

The Agentforce integration playbook

Unlock revenue and better
customer service

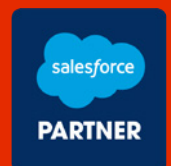


Table of contents

Breaking through AI limitations	03
The integration barriers	04
Assessing your current state	06
Building your integrated Agentforce	07
Implementation blueprint	09
The path to a smart and connected Agentforce	11



Breaking through AI limitations

Imagine how much time you'd save with an AI agent that instantly rebooks disrupted travellers, offers personalised room upgrades during extension requests, or processes payments for tour modifications – all without customer support intervention.

Sadly, most Agentic AI implementations miss the mark, becoming a less helpful FAQ-answering, ticket-creating mess.

But that doesn't mean you should give up.

At Showoff, we've been connecting wider travel, tourism, and hospitality systems — reservation systems, inventory platforms, payment processors — to transform simple question-answer agents into customer service heroes that (actually) help customers, save you time, and generate more revenue through upsells.

And what we've learnt is, the key isn't better AI, it's better connections — more context for AI to work with.

This playbook outlines how to take your Agentic AI from dumb to delightful through data and integrations.



The integration barriers...

and why most implementations fall short

AI agents promise hands-off customer resolutions and upselling opportunities. But most implementations are built on shaky architecture that almost always falls short. These barriers are no different from traditional CRM challenges — siloed data and disconnected systems — but they have a big impact on AI effectiveness.

1.

The system isolation problem

A lot of early stage Agentforce implementations were confined to data within Salesforce, while critical operational information lives elsewhere. Passenger and booking data typically resides in reservation systems, not in your CRM. Real-time availability and pricing information stays locked in inventory platforms. This isolation means digital agents can only see part of the picture, as it tries to solve a puzzle with half the pieces missing.

2.

The capability ceiling

Without connections to operational systems, Agentic AI hits a hard ceiling on what it can accomplish. It can tell customers their flight is delayed but can't offer rebooking options. It can acknowledge a hotel extension request but can't confirm availability. This transforms what could be complete solutions into message-taking. "I'll create a ticket for that" isn't the customer experience anyone wants in 2025.

3.

The missed revenue opportunity

Perhaps the most significant cost of isolation is the revenue left on the table. Upgrade opportunities go unnoticed without access to inventory systems. Cross-sell potential is wasted without visibility into customer preferences. Service interactions end before value can be captured, turning potential revenue moments into cost-only exchanges.

Assess your current state

Before mapping your integration journey, let's understand where you stand today and what an "integrated Agentforce" actually looks like.

What does an integrated Agentforce look like?

An integrated Agentforce has comprehensive visibility across customer data, operational systems, and inventory. It possesses transaction authority to make bookings, process changes, and handle payments directly. The system then pulls in personalisation capabilities based on complete customer context and history, and maintains revenue awareness to identify upsell opportunities.

ASSESSMENT CHECKLIST

Data foundation

- ✓ Is your customer data clean, accessible, and accurate across systems?
- ✓ Can your systems share information in real-time or near real-time?
- ✓ Do you have a unified view of customer interactions across channels?

System connectivity

- ✓ Which operational systems contain data essential for complete service resolution?
- ✓ Do these systems have existing APIs or integration points?
- ✓ What are the security and compliance requirements for these connections?

Business outcomes

- ✓ What is the primary business outcome you want to achieve?
- ✓ What systems does the required data live in to achieve these outcomes?
- ✓ Are the necessary actions (bookings, amendments, payments) accessible via APIs?



SECTION THREE

Building your integrated Agentforce

The integration journey typically follows three levels, each building on the foundation of the previous one

1.

Connecting reservation and inventory systems

The first priority for most travel, tourism, and hospitality businesses is connecting Agentforce to the systems that manage availability and bookings.

What it enables

When Agentforce connects to your reservation systems, it gains the ability to perform real-time availability checks and modification capabilities for changes, cancellations, and rescheduling—all within the conversation flow.



What it delivers

This fundamental integration dramatically speeds up resolution for booking-related inquiries. Organisations typically see decreased cancellation rates during disruption events as alternatives become immediately available.

2.

Enhancing customer experience with operational connections

The second level extends Agentforce's capabilities by connecting to systems that manage customer preferences, loyalty programmes, and connected services.

What it enables

Connecting Agentforce to customer systems creates a foundation for truly personalised service. Customer profile integration brings preferences, history, and status into every interaction. Loyalty programme access provides visibility into points, tiers, and eligibility for perks.



What it delivers

This integration level dramatically improves service personalisation by recognising the full customer context. Organisations typically see higher customer satisfaction scores as interactions become more relevant to individual needs.

3.

Transforming service into a profit centre with payment integration

The final integration level connects Agentforce to payment processing and dynamic pricing systems, enabling it to complete transactions within service interactions.

What it enables

Payment processing for upgrades, changes, and new bookings becomes possible when Agentforce connects to your financial systems. This integration provides access to dynamic pricing for real-time offers and adjustments.



What it delivers

This integration transforms service from a cost centre to a profit driver. Direct revenue generation through service interactions becomes possible as problems convert into sales opportunities.



CASE STUDY

Finnair

By connecting Agentforce to Service Cloud's automation tools and payment processing capabilities, Finnair transformed standard service processes into revenue opportunities. When a customer needs to change a flight, the connected Agentforce can offer premium seats with real-time pricing, handle the payment difference, and confirm the booking—all without human intervention.



Agentforce is going to be the heart of customer service; I see it is revolutionary”

– Taina Kunelius, Head of Before and After Journey CX, Finnair

Implementation blueprint

A successful integration requires a strategic approach that balances technical considerations with business priorities. Here are your options.

Technical options



Salesforce Flow with Apex Actions

Best for direct connections to modern APIs with straightforward data requirements. Advantages include native Salesforce development approach, simplified maintenance, and faster implementation for standard integration patterns.



Heroku AppLink

Ideal for complex integration scenarios requiring transformation or high-volume handling. Offers excellent scalability for high-traffic periods like holiday booking seasons or disruption events.



MuleSoft

Organisations pursuing an enterprise-wide integration strategy beyond just Agentforce should consider MuleSoft. The platform excels at centralised API management across multiple systems and use cases.

The incremental approach

Rather than attempting to build all integrations simultaneously, we recommend an incremental approach:

- ✓ Start with high-impact, low-complexity connections
- ✓ Focus on complete customer journeys rather than system connections
- ✓ Measure and refine as you go
- ✓ Scale progressively as you learn

Measuring full value

Evaluating success requires looking beyond traditional service metrics. Track resolution completion rate, average resolution time, and cancellation recovery rate. Measure revenue per service interaction and customer effort score to capture the full business impact of your integration.



The path to a smart and connected Agentforce

The difference between basic and transformative Agentforce isn't about having smarter AI, it's about connecting that AI to the systems where your business operates. With the right integrations, you can transform service from a cost centre into a revenue engine, turn disruptions into opportunities, questions into sales, and frustrated customers into loyal advocates.



Ready to assess your Agentforce potential?

Contact us at hello@showoff.ie to schedule an Agentic AI Workshop and begin your journey toward an Agentforce implementation that doesn't just answer questions, but drives revenue and an engaging customer experience.

[BOOK A TIME TO CHAT](#)