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# AI Success Stories

Empowering the Salesforce Ecosystem through Artificial Intelligence



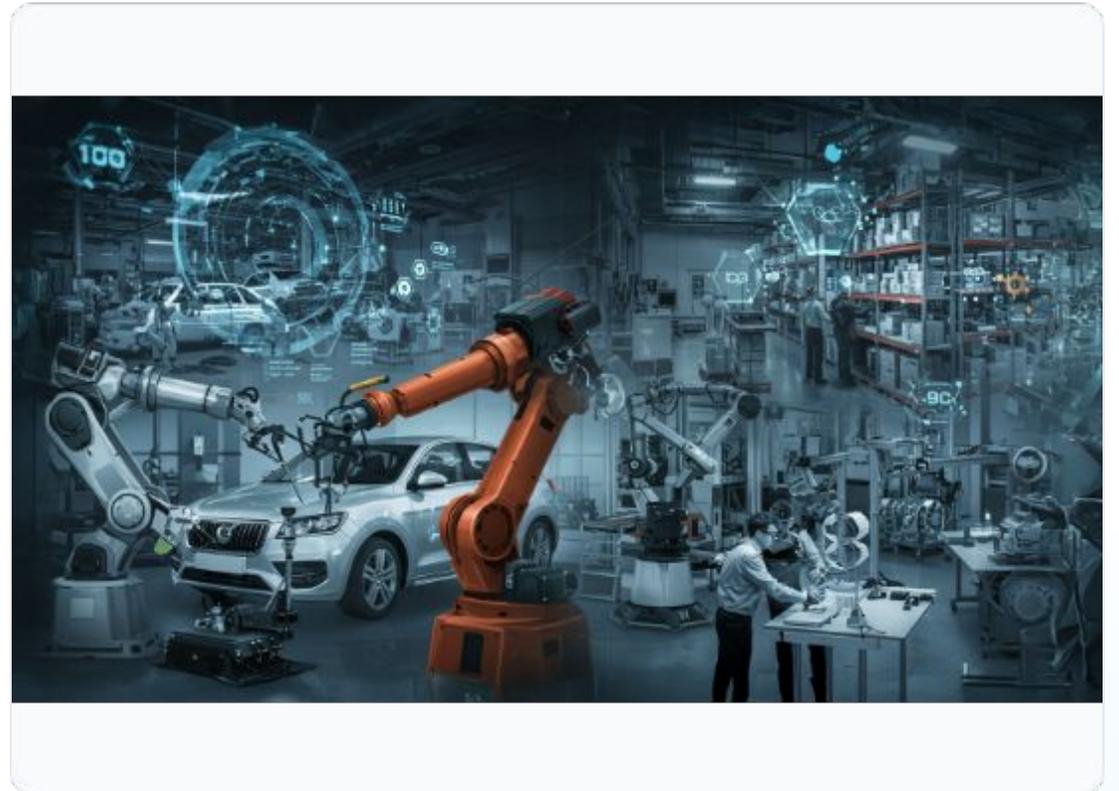
Empowering the Salesforce Ecosystem through Artificial Intelligence

# AI-Powered RFQ Processing

## Automating Industrial Procurement

Processing high-volume inbound RFQs via Email-to-Case orchestrated by Einstein Generative AI.

-  **Intent Classification:** 100% accuracy in separating RFQs from support.
-  **Data Extraction:** Extracts SKUs and quantities from PDFs/Images.
-  **Data Cloud Enrichment:** Autonomous web search for missing specs.



# Copilot AI Agent: Automated Support

Accelerating medical product knowledge and compliance.

## Strict Compliance

Enforced safety guardrails preventing unauthorized clinical advice or off-label promotions.



## Grounded Knowledge

AI grounded in curated SharePoint documents, providing concise, source-cited technical answers.



## 97% Accuracy

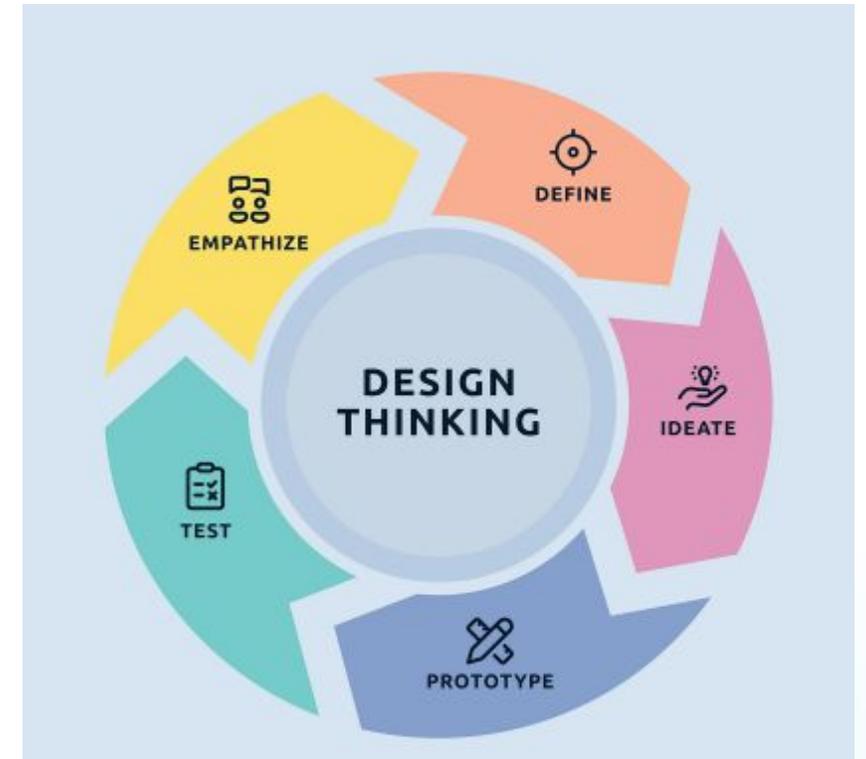
Significant acceleration of the onboarding process for new sales representatives.

# Strategic AI Capability Building

## Modernizing Operations

Designed a custom discovery program to bridge the AI knowledge gap for leadership.

<b>Workshops</b>	Four intensive 2-hour strategic sessions
<b>Exercises</b>	Design Thinking to map operational pain points
<b>Outcome</b>	Prioritized roadmap and AI backlog creation



# Internal Enterprise AI Assistant



## Hybrid Slack Integration

A digital assistant unifying resource management and HR knowledge access.

**Dialogflow-First:** Zero-latency CRUD operations on Salesforce objects.

**Gemini 2.5 Flash:** RAG architecture for HR policy retrieval.

**Latency Optimized:** Reduced Salesforce login time from minutes to seconds.

# Case Summarization

## One-Click Knowledge Capture

Agents struggle with consistent case handovers. We implemented an Agentforce Action to automate context synthesis.

- ✓ Standardized documentation quality.
- ✓ Standardized escalation reporting.
- ✓ Standardized case insights accessibility.

# 100%

## Consistency Achieved

Zero manual drafting required for standard handovers.

# Site Tracker Project Agent

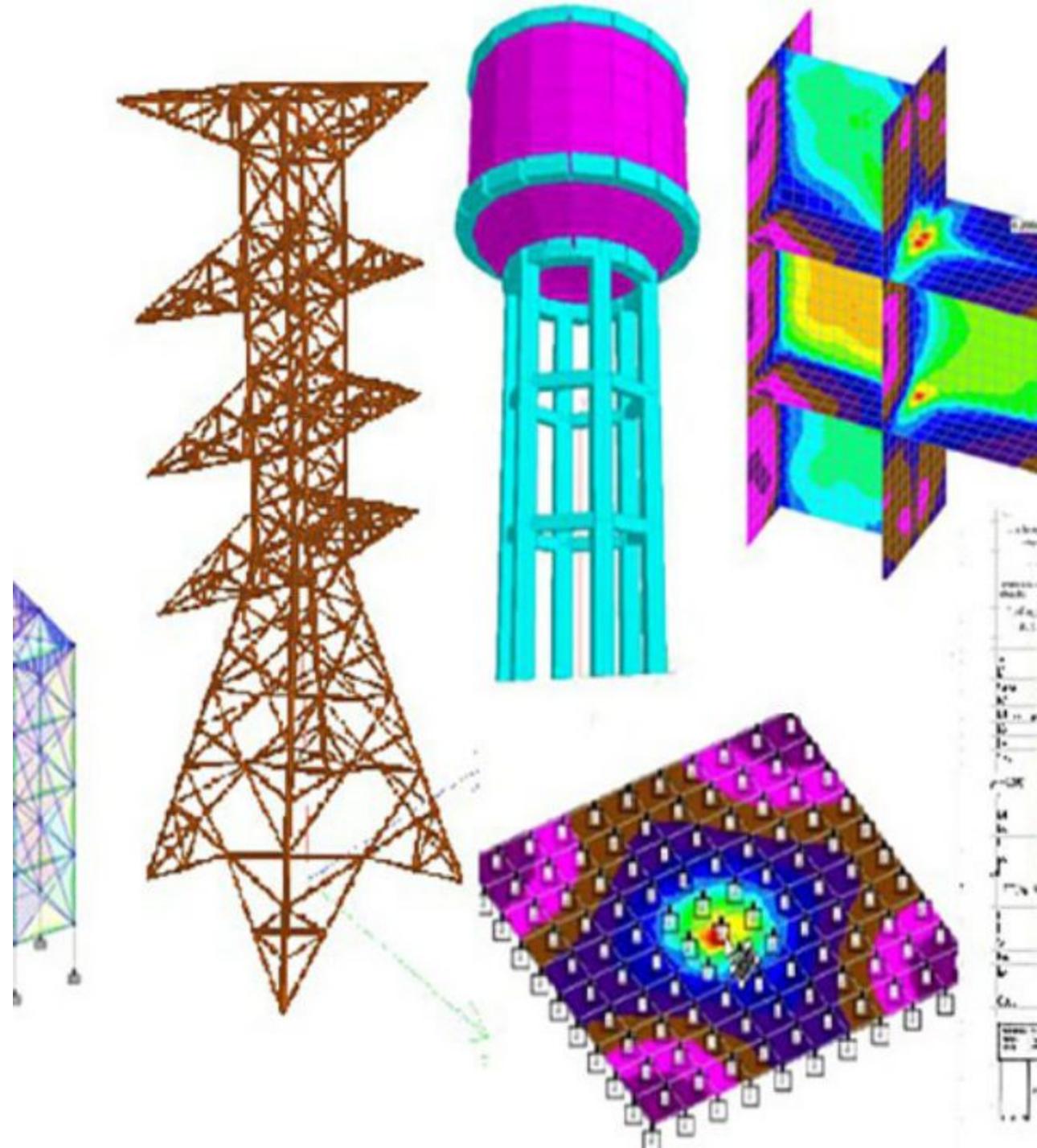
## Real-Time Construction Insights

Project managers needed instant snapshots of tower construction projects without complex navigation.

*"What's the duration and task breakdown for Project 1042?"*

Agent returns computed durations, milestone counts, and critical path items instantly.

**Outcome: Zero-click insights for non-technical stakeholders.**



# AI Solution Architecture Overview

Solution Type	Core Technology	Integration Method	Primary Value
Generative RFQ	Einstein Prompt Templates	Apex Invocable Actions	Reduced response time to <72hrs
Product Agent	Microsoft Copilot Studio	Teams/SharePoint RAG	97% technical accuracy
Digital Assistant	Gemini 2.5 Flash / Node.js	Slack / Qdrant Vector DB	Unified operational workflows
Insight Agent	Agentforce Actions	NLP Site Tracker Query	Zero-click reporting

# Summary of Business Value



**Revenue Growth:** Increased opportunity processing ensures no RFQ goes unattended.



**Operational Scaling:** Handle higher volumes without increasing headcount.



**Risk Mitigation:** 100% auditability through automated Salesforce logs and safety guardrails.



**Efficiency:** Repurposing "Inside Sales" from data entry to high-value closing activities.



**Innovation Culture:** Moving from uncertainty to a clear, actionable path for AI adoption.

# Questions?

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