

AI-Driven Customer & Revenue Operations using **Salesforce Agentforce**



Operations



Salesforce Agentforce



US



Agentforce



Our Customer

A subscription-based digital platform was already running on:

- ✓ Salesforce (CRM + Billing)
- ✓ MuleSoft (integration layer)
- ✓ Multiple external systems (payments, tax, support, communication)

However, despite strong infrastructure, operations were still:

- Reactive
- Manual
- Dependent on human intervention

The client wanted to leverage AI to automate decision-making, improve customer experience, and optimize revenue operations.



Challenges Faced



- ✓ Support agents handling repetitive queries manually.
- ✓ No intelligent recommendations for upsell/cross-sell.
- ✓ Delays in quote-to-cash lifecycle.
- ✓ No proactive issue detection (failures found after customer impact).
- ✓ Billing and subscription changes required human validation.
- ✓ Knowledge scattered, not actionable.

What We Did

- ✓ Implemented Agentforce as an AI layer on top of Salesforce CRM, Billing, and MuleSoft integrations.
- ✓ Configured AI agents for Support, Billing, and Sales to automate routine operations.
- ✓ Leveraged Prompt Builder to generate contextual responses using customer, subscription, and payment data.
- ✓ Enabled autonomous actions (case updates, subscription changes, alerts) via flows and APIs.
- ✓ Integrated real-time data from external systems through MuleSoft for accurate AI decision-making.
- ✓ Built AI-driven copilots for agents to assist with summaries, recommendations, and next-best actions.
- ✓ Established proactive monitoring workflows to detect failures and trigger automated resolutions.

Value We Offered

- ✓ **60–70% reduction in manual support effort.**
- ✓ **30% faster quote-to-cash cycle.**
- ✓ Improved upsell conversion via AI recommendations.
- ✓ Near real-time issue detection and resolution.
- ✓ Reduced dependency on human agents.
- ✓ Scalable AI-driven operations.

Lessons Learned

- ✓ AI without context = useless → **data model matters.**
- ✓ Agentforce works best when:
 - Integrated deeply with CRM + billing.
 - Connected via MuleSoft to external systems.
- ✓ Start with **assistive AI** → **move to autonomous AI.**
- ✓ Knowledge base quality directly impacts AI performance.
- ✓ Governance is critical.

Conclusion

- ✓ Intelligent automation across lifecycle
- ✓ Better customer experience
- ✓ Revenue optimization through proactive insights.

