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5 Tips to Get Started with Agentforce

Heather Rinke
Salesforce Product Director
Sercante

Thanks To Our Incredible Sponsors

AI Evolution

Predictive

"What should I do next?"

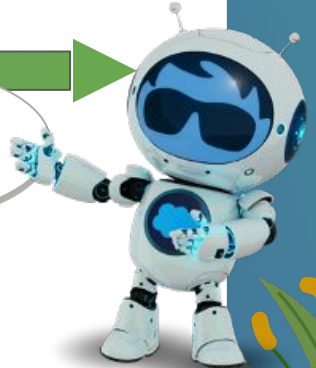Scoring
Next Action
Bots

Generative

"Help me get the job done"

Sales Emails
Call Summaries
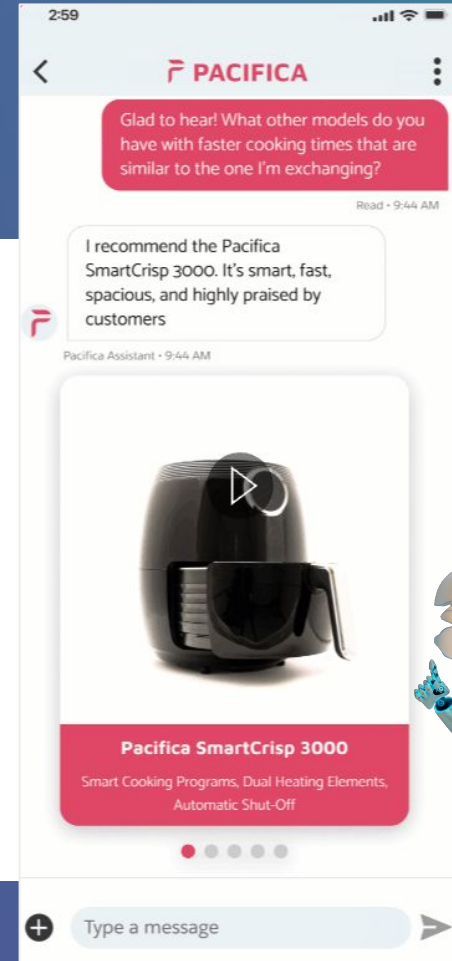Copilots

Autonomous

"Just do the job for me"
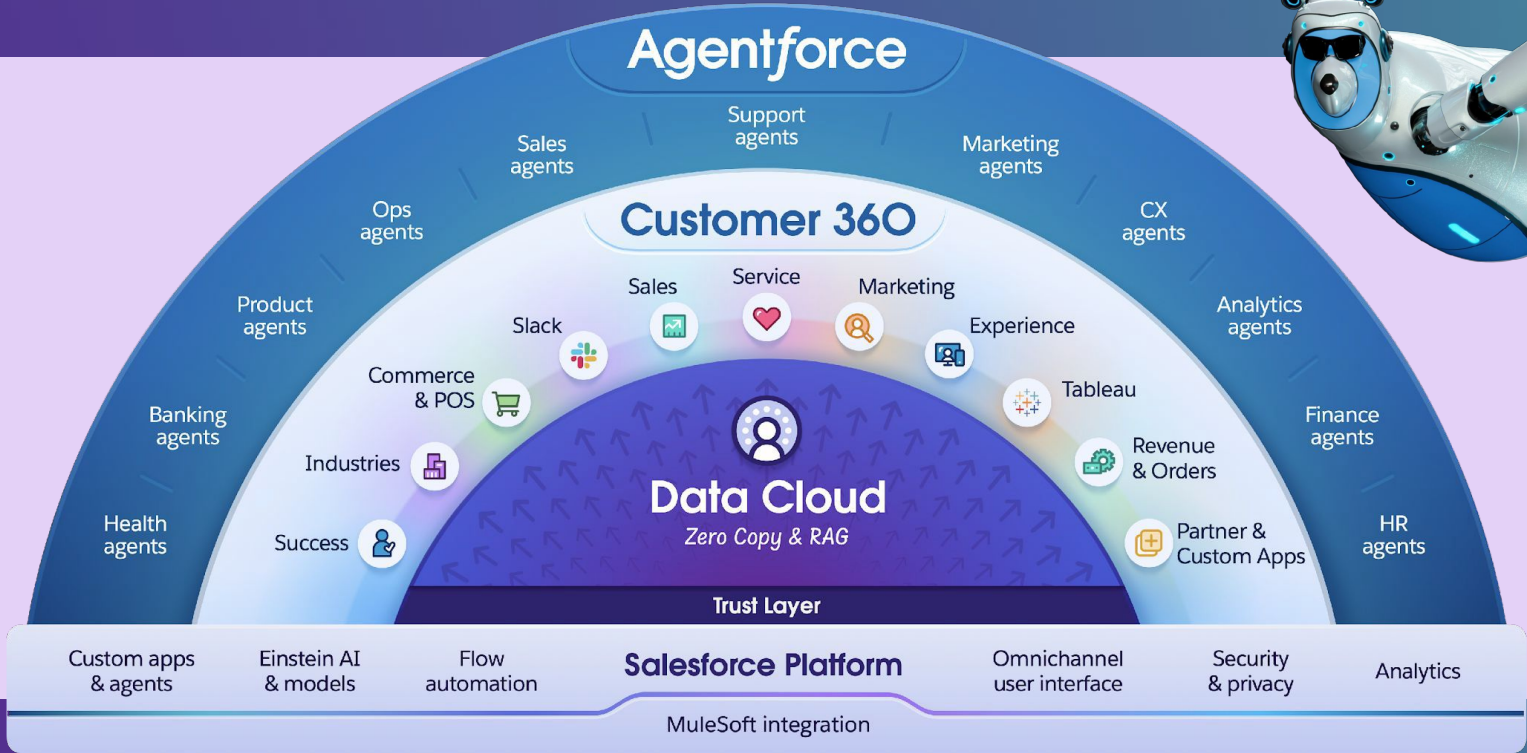
Agents/ Agentforce

What is Agentforce?

- Enables automation of tasks with intelligent 'autonomous' agents

- Deploy out-of-the-box agents or create your own

- Connect agents to enterprise data

- Enable agents to take actions with existing workflows, code and APIs

What is Agentforce?

Agentforce

Customer 360

- Support agents
- Sales agents
- Marketing agents
- Ops agents
- CX agents
- Product agents
- Analytics agents
- Banking agents
- Finance agents
- Health agents
- HR agents

Sales · Service · Marketing · Experience · Slack · Commerce & POS · Industries · Success · Tableau · Revenue & Orders · Partner & Custom Apps

Data Cloud
Zero Copy & RAG

Trust Layer

Salesforce Platform

| Custom apps & agents | Einstein AI & models | Flow automation | | Omnichannel user interface | Security & privacy | Analytics |

MuleSoft integration

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What is Agentforce?

Out-of-the-Box Agents

Autonomous

"Digital Workers" that perform a set of tasks and hand-off to a human

Examples:
- **Service Agent**
- **SDR**
- **Personal Shopper**

Assist & Augment

Helps humans perform tasks more efficiently

Examples:
- **Sales Coach**
- **Case Wrap Up**
- **Campaign Generation**

+

Set of Tools to Create Your Own

Agent Builder

Create, test and deploy custom agents, using:
Topics
Data
Actions
(using Prompts, Flows, Apex, APIs)

Generally Available   Roadmap

Agentforce: Building Blocks of an Agent

Create a
Topic
to define the job to do

Give the topic
Instructions
the Agent must follow

Create & Assign
Actions
the Agent can do and
instructions on when take
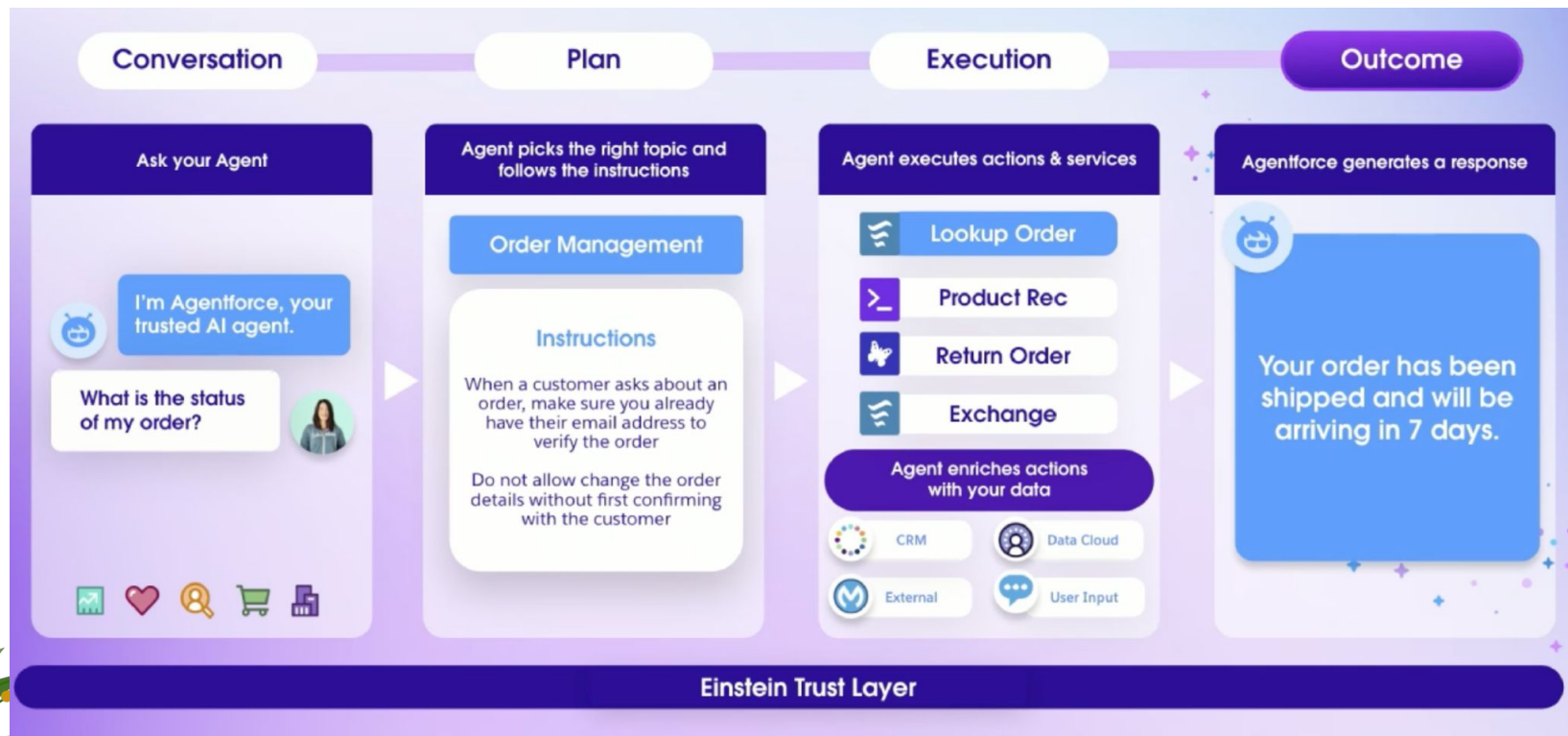that action

Determine the
Channel
where the Agent runs

Order Management

- Always offer to look up order status using either the order number or an email address.
- Always look up return status before creating a return label.
- Before processing a return, educate the customer on the return process using knowledge articles
- If a package is lost, immediately escalate the issue to a live agent.

- Answer Questions with Knowledge
- Escalate to Live Agent
- Lookup Order Status (Flow/Apex)
- Lookup Return Eligibility (Flow/Apex)
- Generate Return Label (Apex)

- Website / Online Store

Agentforce: How It Works

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Conversation — Plan — Execution — Outcome

Ask your Agent
I'm Agentforce, your trusted AI agent.
What is the status of my order?

Agent picks the right topic and follows the instructions
Order Management

Instructions
When a customer asks about an order, make sure you already have their email address to verify the order

Do not allow change the order details without first confirming with the customer

Agent executes actions & services
Lookup Order
Product Rec
Return Order
Exchange

Agent enriches actions with your data
CRM
Data Cloud
External
User Input

Agentforce generates a response
Your order has been shipped and will be arriving in 7 days.

Einstein Trust Layer

Agentforce: Standard Topics & Actions

Standard **Topics**

14+ topics, including:

- Content Creation
- Marketing Campaigns
- Prospect
- Forecast Sales Revenue
- Close and Manage Deals
- Communicate with Customers
- Conversation Explorer
- General CRM

Standard **Actions**

30+ topics, including:

- Answer Question with Knowledge
- Create a To-Do
- Create a Close Plan
- Draft or Revise Email
- Explore Conversation
- Get Activity Timeline
- Review my Day
- Summarize a Record
- Send meeting request

Agentforce: Atlas Reasoning Engine

Agentforce: What it CAN Do

Augment & Automate	Generate Ideas	Enrich & Manage Data
Personalize at Scale	Data Visualization & Analytics	Summarize Data
Create Content	Generate Code	Search & Learn

What it CAN'T Do

Fix Your Data

Automate Everything

Know what to do without Training

Maintain Itself

AI is very capable, but not very "smart"... it's not a magic wand

What's Available Today?

As of Oct 2024*:
- Service Agent
  - First out-of-the-box agent
  - More agents on the roadmap to help sales, service, marketing and commerce
- Agent Builder + Tools
  - Topics, Instructions, Actions
  - To support building your own
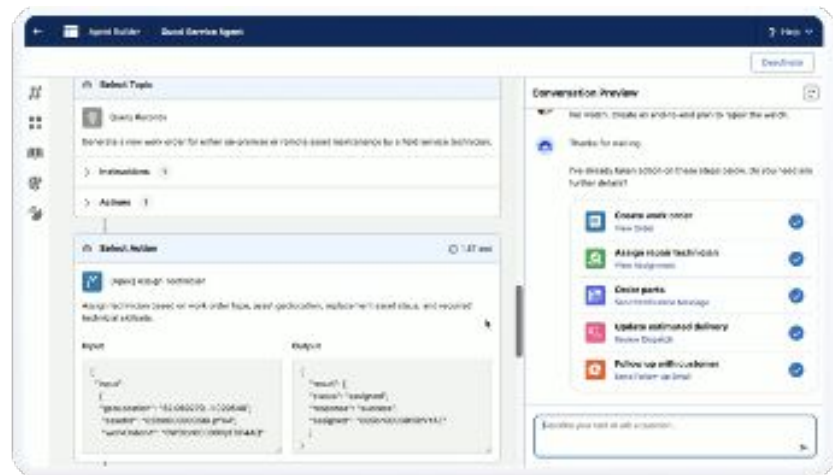
with Einstein 1 Edition or Einstein add-ons

5 Tips for Getting Started

TIP #1

Identify Use Cases

Identify Use Cases

- ❏ Understand pain points today
  - ❏ Where could we reduce costs by automating tasks?
  - ❏ Where could we augment to improve customer/employee experience?
  - ❏ Are there any untapped areas of opportunity?

- ❏ Think of the outcomes
  - ❏ What job should they do?
  - ❏ Where will they work?
  - ❏ What data should they access?
  - ❏ What actions will they need to take?
  - ❏ What actions should they NOT take?

Identify Use Cases

❏ Prioritize use cases based on agreed-to criteria
example:

> low effort or risk *(what data is needed, what are the impacts, what are the costs)*
> vs
> high value *(productivity, customer experience)*

❏ Break down business process to determine where an agent could support

Examples

Sales

Give Sales Reps deal insights & guidance

Automate sales appointment scheduling

Generate sales plans for sales teams

Assist with lead nurturing tasks

Service

Deflect cases by sharing order status

Automatically answer common customer questions

Service appointment scheduling

Automate returns processing

Marketing

Automatically build segments that meet target criteria

Draft Email Content

Generate Campaign Briefs

Identify Personalization recommendations

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TIP #2

Define Success Metrics

Define Success Metrics

How will you measure success?

Questions to ask:

- ❏   What is the problem we are trying to solve?

- ❏   What does success mean?

- ❏   How can we measure today?

📊 Examples

Sales

Lead response time

Deal size

Deal velocity

Pipeline generated

Service

Response rate

Handling time

Abandonment rate

Marketing

Campaign ROI

Lead Conversion Rate

Engagement Metrics

TIP #3

Assess Your Data

Assess Your Data

Agents will only be as good as your data

- ❏ Inventory data needs
    - ❏ CRM data, Knowledge data
    - ❏ Data sources
    - ❏ Locations

- ❏ Assess Your Data
    - ❏ Is it Accessible?
    - ❏ Is it Reliable?
        - ❏ Accurate
        - ❏ Complete
        - ❏ Valid
        - ❏ Unique
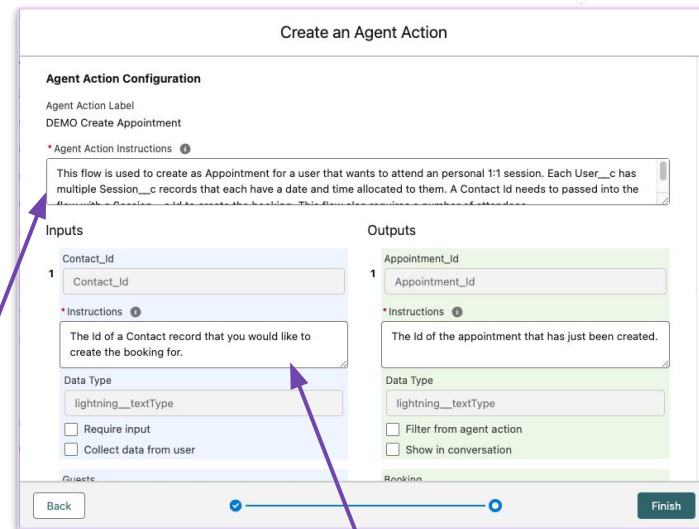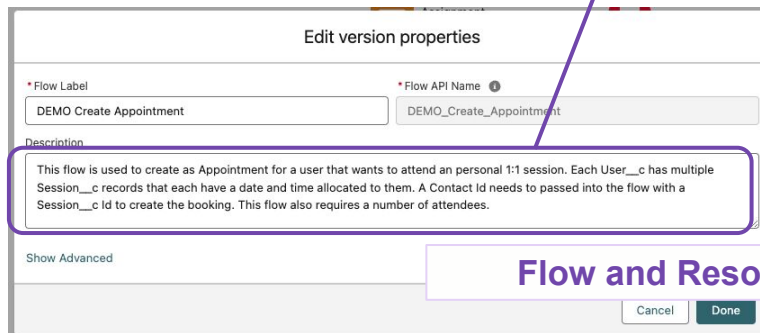
Assess Your Metadata

Custom Actions rely on your prompt templates, flows and Apex
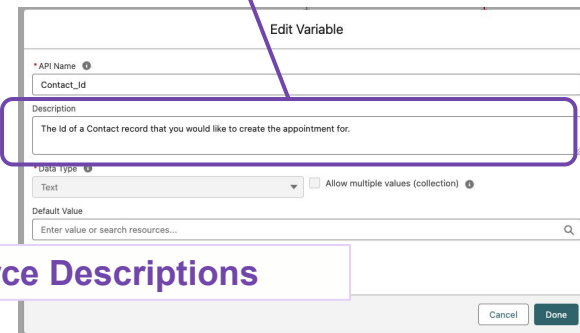
- ❏ Are the Descriptions clear and concise?
- ❏ Are they relevant?
- ❏ Do they describe the action being taken?
- ❏ Are the inputs and outputs clearly defined?

Flow and Resource Descriptions

TIP #4

Start Small

Start Small

What will have the most impact in the shortest amount of time?

- ❏ Pick one use case to pilot
    - ❏ break it down into smaller processes if it makes sense to
- ❏ Start with out of the box agents / topics / actions
- ❏ Build momentum & excitement
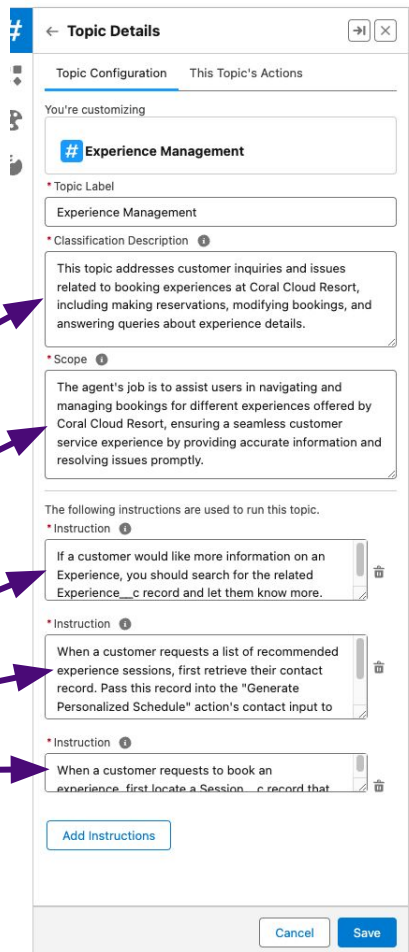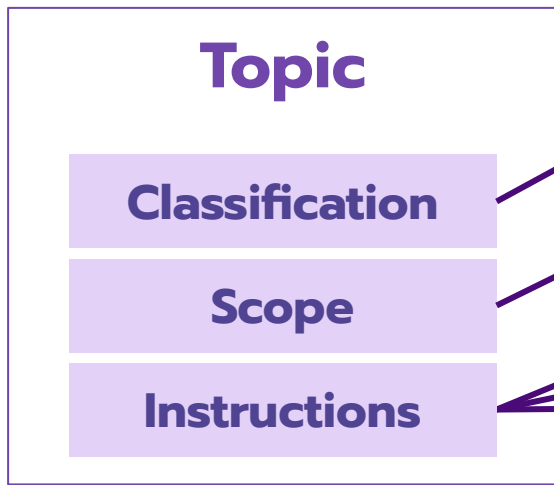- ❏ Track & measure success
- ❏ Use feedback to grow

TIP #5

Make your instructions solid

Instructions are the key to grounding your agent

Topic

Classification

Scope

Instructions

← **Topic Details**

Topic Configuration | This Topic's Actions

You're customizing

\# **Experience Management**

* Topic Label

Experience Management

* Classification Description ⓘ

This topic addresses customer inquiries and issues related to booking experiences at Coral Cloud Resort, including making reservations, modifying bookings, and answering queries about experience details.

* Scope ⓘ

The agent's job is to assist users in navigating and managing bookings for different experiences offered by Coral Cloud Resort, ensuring a seamless customer service experience by providing accurate information and resolving issues promptly.

The following instructions are used to run this topic.

* Instruction ⓘ

If a customer would like more information on an Experience, you should search for the related Experience__c record and let them know more.

* Instruction ⓘ

When a customer requests a list of recommended experience sessions, first retrieve their contact record. Pass this record into the "Generate Personalized Schedule" action's contact input to

* Instruction ⓘ

When a customer requests to book an experience, first locate a Session__c record that

Add Instructions

Cancel | Save

Instructions are the key to grounding your agent

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Actions

Action Instructions

Input & Output Instructions

Create an Agent Action

Agent Action Configuration

Agent Action Label
Initiate Return

* Agent Action Instructions ⓘ

Use Initiate Return for requests to return or refund orders or products in an order.

Input

OrderRecordID

1 | OrderRecordID

* Instructions ⓘ

Populate this input variable with an Order recordId.

Data Type

lightning__textType

☑ Require input
☐ Collect data from user

Output

ReturnSummary

1 | ReturnSummary

* Instructions ⓘ

Populate this input variable with an Order recordId.

Data Type

lightning__textType

☐ Filter from agent action
☑ Show in conversation

Back   Finish

Best Practices

Start Simple

Use Plain Language

Avoid industry or company jargon

Think of all paths

Remember to include guardrails!

TEST TEST TEST! Using the Agent builder

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Get Your Hands On It

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Get Ready for Agentforce

Trail

Get Ready for Agentforce

Learn how Agentforce fits your business goals, launch your first agent, and build a plan for AI success.

Generative AI Basics
Agentforce Agents: Quick Look
Agentforce Service Agent: Quick Look
Quick Start: Build Your First Agent with Agentforce

Virtual Events

salesforce **Join a virtual Agentforce workshop to build your first Agent.**

Sign up here and we'll notify you when our virtual workshop premieres.

Can't make it to Dreamforce? We've got you covered with a virtual workshop guided by Agentforce experts. Sign up to learn:

✓ Automate routine tasks to spend more time building customer relationships.
✓ Quickly and easily catch up on institutional knowledge with the help of generative AI.
✓ Connect with teams, partners, and customers all in one place.

Questions? Call us at 1-800-707-9147.

More Ways to Learn

Agentforce World Tours

Salesforce+

Sessions to Check Out

DAY 1

1:00 – 1:30 PM EST - **The Fifth Element: YOU! + Data + AI + CRM + Marketing**

1:30 – 2:15 PM ET - **AI-Driven Journeys in Marketing Cloud**

1:30 – 2:15 PM EST - **Leveraging Custom GPTs for Efficient Data Cloud Implementations in RevOps**

2:15 – 2:45 PM EST - **An Unsexy AI Presentation: Turning Hype Into Trust**

3:00 – 3:55 PM EST - **Closing Keynote/Panel – Hot Takes: Marketing's Future & AI**

DAY 2

1:00 – 1:30 PM EST - **Smarter Selling, Faster Closing: AI-powered CRM Revolution**

1:30 – 2:15 PM ET - **Build Your First Agent using Agentforce**

Thank You!