



The Fifth Element: YOU! + Data + AI + CRM + Marketing



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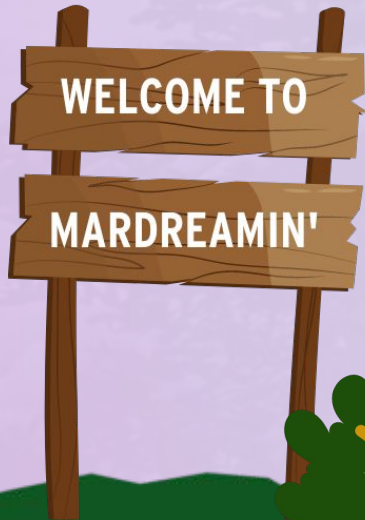
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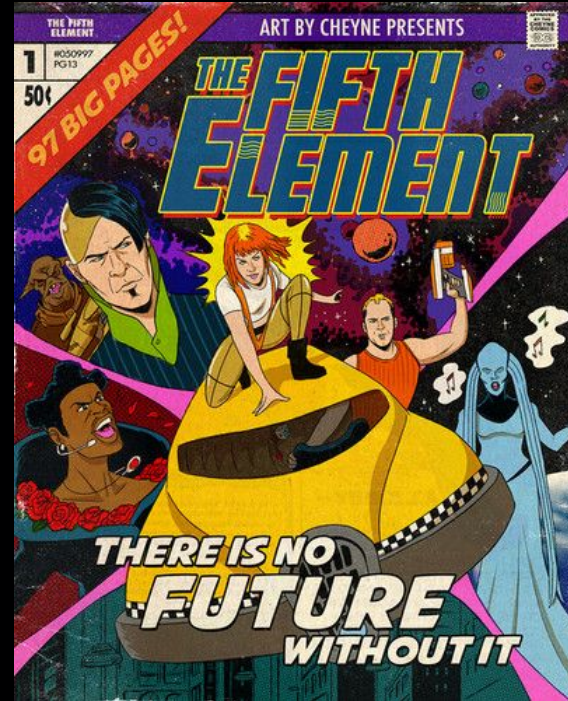
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Agenda

- **YOU! = The Fifth Element**
- **Data & Data Cloud**
- **AI & Agentforce**
- **Plan for the Future**
- **Key Takeaways**



The Fifth Element: YOU! + Data + AI + CRM + Marketing



YOU! = The Fifth Element



The Fifth Element: YOU!

- **YOU** are the most important part!
- Bring **YOUR** unique background and perspective to your job
- Get to know **your** company's data
- AI can't replace **YOU**
- **YOU** can bring the '4 elements' together for success!



What do you want to accomplish?

- ★ What are your top use cases?
- ★ What data do you need to support those use cases?
- ★ Is the data available and reliable? How many sources of data?
- ★ How often will you need to refresh the data?
- ★ Is the data structured or unstructured?
- ★ What systems can accelerate, enhance, or transform what you're trying to accomplish?



Data + AI + CRM + Marketing



Let's talk "Data"

- ★ Companies usually have TONS of Data
- ★ Structured vs. Unstructured
- ★ How bad is 'bad' data?
 - 94% of businesses data is inaccurate
 - 18% of all telephone numbers change
 - Bad data costs U.S. businesses over \$3T /yr
- ★ How to measure data hygiene?:
 - Data Accuracy
 - Data Completeness



Things to Know about Data Cloud

1. Data Cloud is a **usage-based** product, meaning that you pay for what you use. There's a difference between credits and 'unified profiles'.
2. Data Cloud **Doesn't Merge** Records - it harmonizes data
3. Need to Understand Basic **Data Modeling**
 - a. Primary Key vs Foreign Key
4. Data Cloud is **Not** a Data Lake
 - a. Data Cloud is a Data Lakehouse
5. Data Cloud is **not** always the right answer



Data Cloud: Structured Data



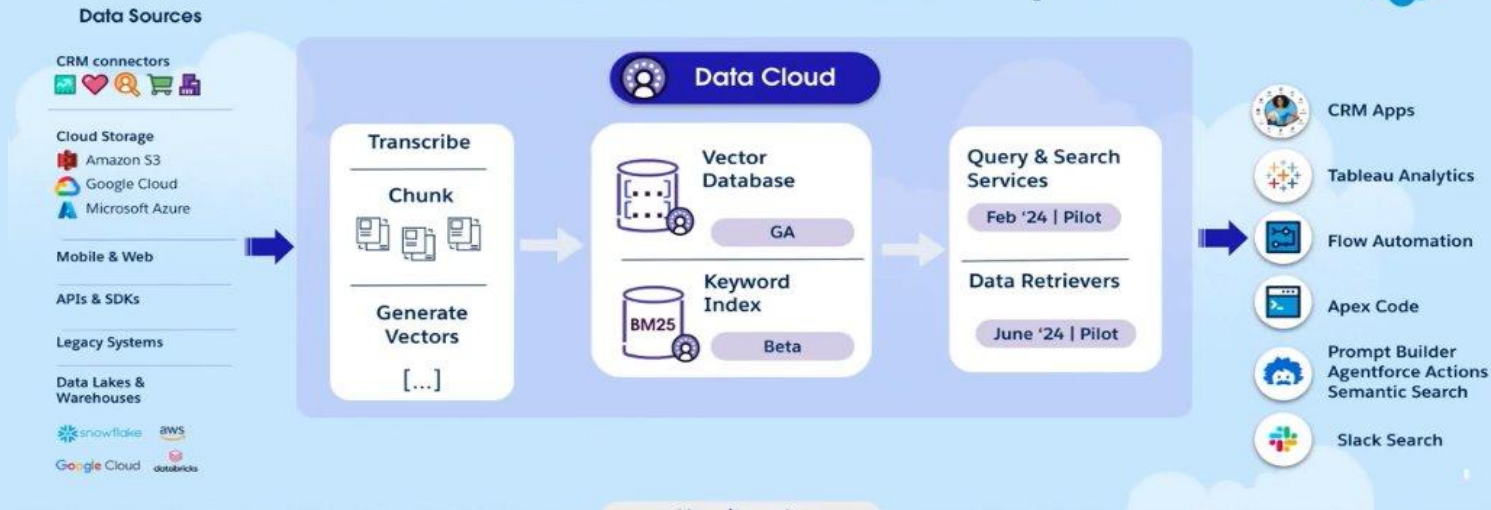
How Data Cloud Works



Data Cloud: Unstructured Data



Activate Unstructured Data Anywhere



How it works

Connect and Ingest

Bring data from CRM, hyperscaler BLOB stores, and major Knowledge sources

Transform and Index

Chunk the text, generate embeddings(vectors), create vectors and keyword index

Activate

Use pro-code and no-code mechanisms to ground AI, build automations, and analyze content with highly relevant responses

AI

- ★ Advances in AI are fast-moving.
- ★ 87% of analytics and IT leaders say advances in AI make data management a high priority.
- ★ 'Clean' data is critical to successful use of AI.
- ★ AI is only as good as the data provided.
- ★ 97% of companies reported benefits from AI: increased productivity and efficiency, improved customer service, and reduced human error.

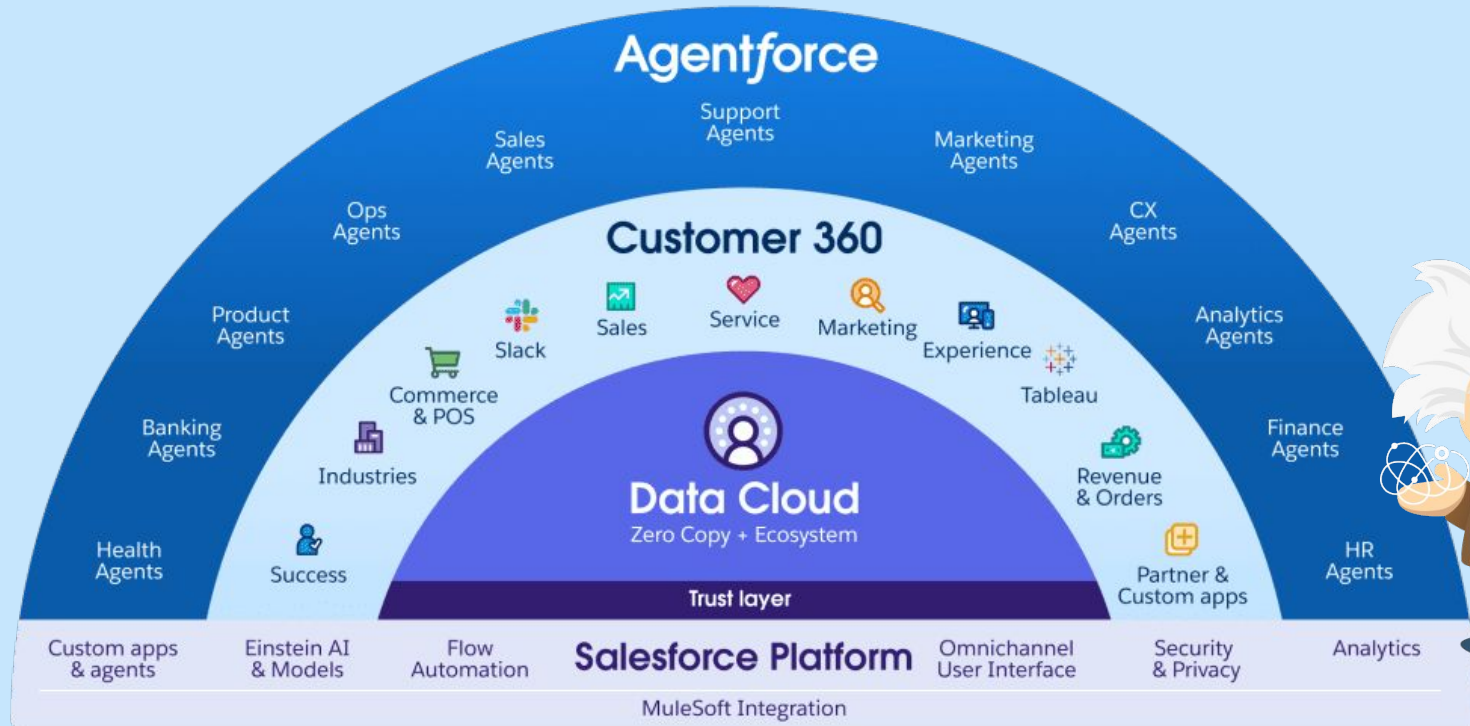


Is AI Right For Your Company?

- Are you data ready?
- Have you identified goals and use cases best suited for AI?
- Do you have the right skill set/team in place to support AI?
- Have you consider the Legal and Ethical Implications of AI?



Agentforce: The No Code Engine of Salesforce



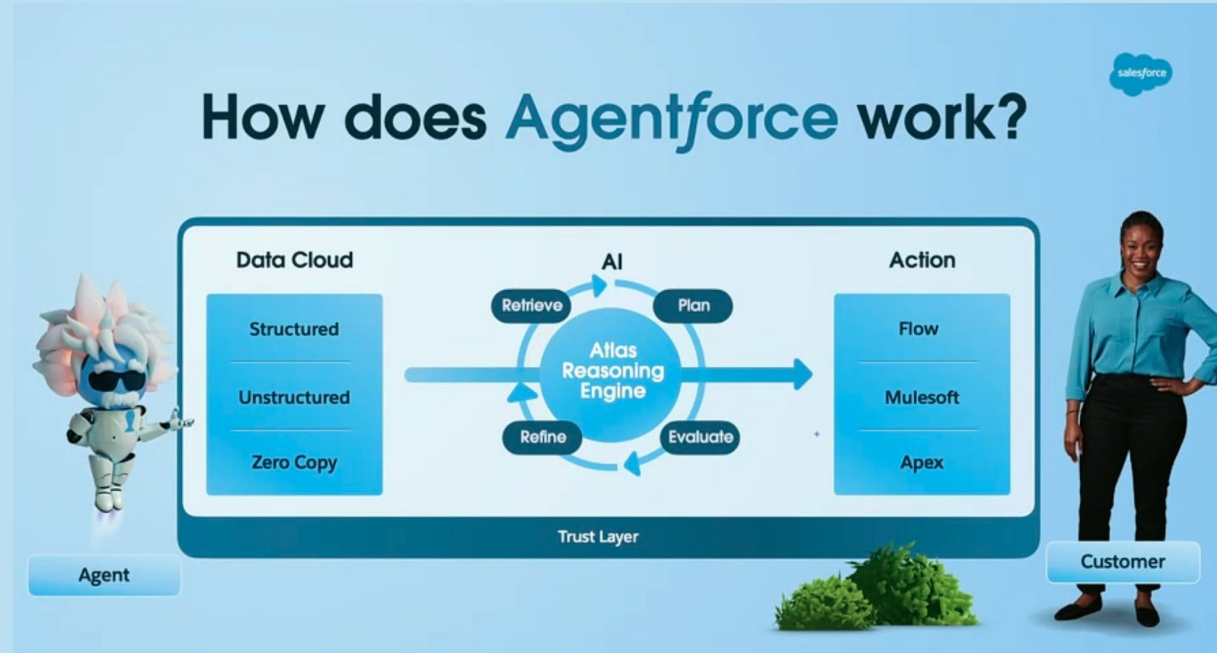
Key Features of Agentforce

1. **AI-Powered Assistants** – equipped with AI agents that can handle repetitive and time-consuming tasks such as data entry, scheduling, and customer inquiries.
2. **Real-Time Data and Insights** - By analyzing real-time data, Agentforce can provide personalized recommendations, forecast customer needs, and proactively address potential issues.
3. **Atlas Reasoning Engine** – AI-powered decision-making tool in Agentforce used to find, evaluate, refine, stitch together and validate quality of the data before sending to user.
4. **Low-Code Customization** – easily customize AI agents using low-code tools like Flow and Apex. This allows organizations to tailor their AI assistants to fit their specific workflows and processes.
5. **Integration with Existing Salesforce Tools** – integrates seamlessly with other Salesforce products like Sales Cloud, Service Cloud, and Einstein GPT.

Agentforce: The Atlas Reasoning Engine



- Conversational experience powered by large language models (LLM)
- Reasoning Layer used to set guardrails for what Agents can't do
- Advanced reasoning, retrieval, decision making, and validate data quality

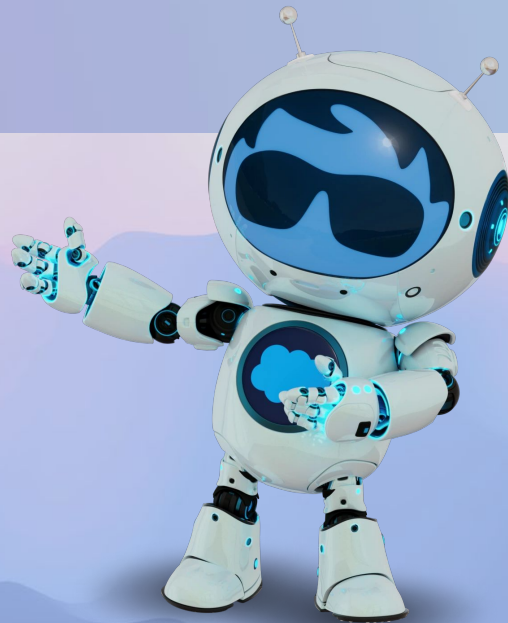


You! + AI + Agentforce

An agent is only as good as you define it to be.

- **Role:** What job should they do?
- **Data:** What data can they access?
- **Actions:** What capabilities do they have?
- **Guardrails:** What they shouldn't do?
- **Channel:** Where do they work?

You are directing the agent's personality and how it represent your brand.



Plan For The Future



Key Takeaways

- ★ **Start with the Use Case** - What does your organization want to achieve?
- ★ **Know your own perspective (you're the Fifth Element)** - Use your knowledge of organizational goals, department priorities, and Salesforce capabilities (and pricing model) - to quickly weigh between them to advise on projects.
- ★ **Get comfortable with Data** - Data will power the future
- ★ **Know what Technology and Resources are available**

Identify a Business Use Case

- ★ Enable Service Agent Visibility into NPS and other Insights
- ★ Optimize customer engagement channels
- ★ Generate AI-powered cross-sell recommendations
- ★ Improve conversion rates among customers with high propensity to purchase
- ★ Identify and engage customers who are likely to churn
- ★ Leverage AI-powered pricing to capture more revenue
- ★ Automatically trigger workflows and communications



YOU! are essential to effectively using AI at your organization



- ★ Your perspective and context of your organization
- ★ Identifying the highest value use cases for AI
- ★ Maximizing existing tools vs. AI capabilities and cost
- ★ How AI should be used responsibly and effectively



Questions?



Salesforce Resources

★ **Move your Career Forward with a Cert in next 6 months:**

- AI Associate - *FREE! Through 2025*
- AI Specialist - *FREE! Through 2025*
- Data Cloud Consultant
- Go to Webassessor and log in to your account and sign up for exam.

★ **Trailhead**

- AI Associate Trail Mix
- AI Specialist Trail Mix



Thank You!

