



Don't **DIY** Your AI

How the Salesforce Platform
allows **humans with agents**
to drive customer success
together

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Forward Looking Statements



This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, anticipated growth and industry prospects, and our strategies, expectation or plans regarding product releases and enhancements. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, results or outcomes could differ materially from those expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: our ability to meet the expectations of our customers; uncertainties regarding AI technologies and its integration into our product offerings; the effect of evolving domestic and foreign government regulations; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including related to AI and Agentforce; our ability to execute our business plans; the pace of change and innovation in enterprise cloud computing services; and our ability to maintain and enhance our brands.





Session Agenda

- 01 Salesforce Company Overview
- 02 Salesforce Platform Overview
- 03 Salesforce AI – Agentforce Demo
- 04 Q & A
- 05 Resources

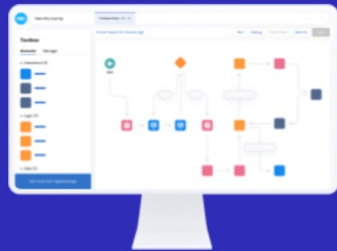




Register for a FREE Salesforce **Development Environment (DE)**

<http://developer.salesforce.com/signup>

Terminology: Salesforce Organization ("Org") | Salesforce Instance | Salesforce Environment | Salesforce Account | Salesforce



Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for a free Salesforce Platform Developer Edition Environment

<https://developer.salesforce.com/signup>



Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

First Name*

Last Name*

Email*

Role*

Company*

Country*

Postal Code*

Username*

By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#) and to the storing and processing of your personal data by Salesforce as described in the [Privacy Statement](#)



Salesforce Company Overview



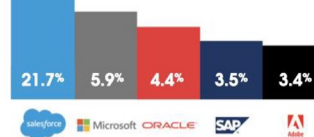
Our vision since 1999

Connect with
your customers
in a whole
new way



Build a Customer 360

Salesforce.
#1 CRM.



Ranked #1 for CRM Applications based on
IDC 2023 Revenue Market Share Worldwide.

Source: IDC, Worldwide Semiannual Software Tracker, April 2024. CRM market includes the following IDC-defined functional markets: Sales Force Productivity and Management, Marketing Campaign Management, Customer Service, Contact Center, Advertising, and Digital Commerce Applications.



Get Connected to Your Dream Job

The Salesforce Economy is Booming

“For Salesforce, it’s not only about creating new technology and career opportunities; we have to pave pathways to these new jobs,”

KRIS LANDE, SVP TRAILBLAZER ECOSYSTEM, SALESFORCE



Global Jobs
11.6M
New Salesforce economy jobs by 2028

Global Economic Impact
\$2T
New business revenue by 2028

IDC | ANALYZE THE FUTURE

*Source: IDC White Paper, sponsored by Salesforce, “The Salesforce Economic Impact,” doc #US48214821, September 20, 2021.



SALESFORCE ADMINISTRATOR

Admins know their Salesforce Org inside out. They spend time automating business processes, and support their users



\$122,000
\$97,000



£53,000
£38,000

SALESFORCE DEVELOPER

Developers come to the rescue when requirements go beyond declarative (point-and-click) configuration tools.



\$144,000
\$109,000



£77,000
£52,000



BUSINESS ANALYST

'The technical translator', forming the bridge between business stakeholders and the technical team. BAs need both business thinking & knowledge of Salesforce platform capabilities.



\$134,000
\$109,000



£68,400
£56,000



salesforce

PROJECT MANAGER

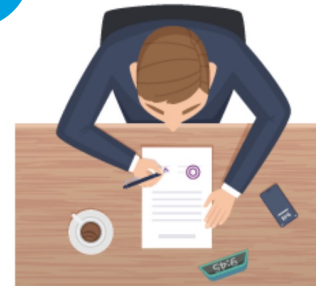
PMs will oversee every element of larger Salesforce projects, including functional/technical resource, timelines, and budget.



\$141,000
\$120,000



£87,000
£70,000



SALESFORCE CONSULTANT

Consultants are brought in to solve client problems with a fresh pair of eyes. They need to adapt to changing environments and have a broad knowledge of the platform.



\$145,000
\$123,000



£70,000
£54,000

TECHNICAL ARCHITECT

Referred to as the 'one percent', TAs need to construct superior Salesforce infrastructure, interwoven with related technologies.



\$167,250
n/a



£142,200
£110,700



<https://www.salesforceben.com/average-salesforce-salaries-infographic/>

Learn Salesforce with Trailhead. For Free.

Build Skills & Get Certified

Comprehensive Learning Platform

Free, gamified learning platform that empowers anyone to skill up for the future

Companion Mobile App: Trailhead Go

Learn marketable skills from anywhere on the Trailhead GO mobile app

Trailhead LIVE

Reinvented classroom experience with live-streamed expert-led classes on today's most in-demand skills

Earn Resume-worthy Skills and Credentials

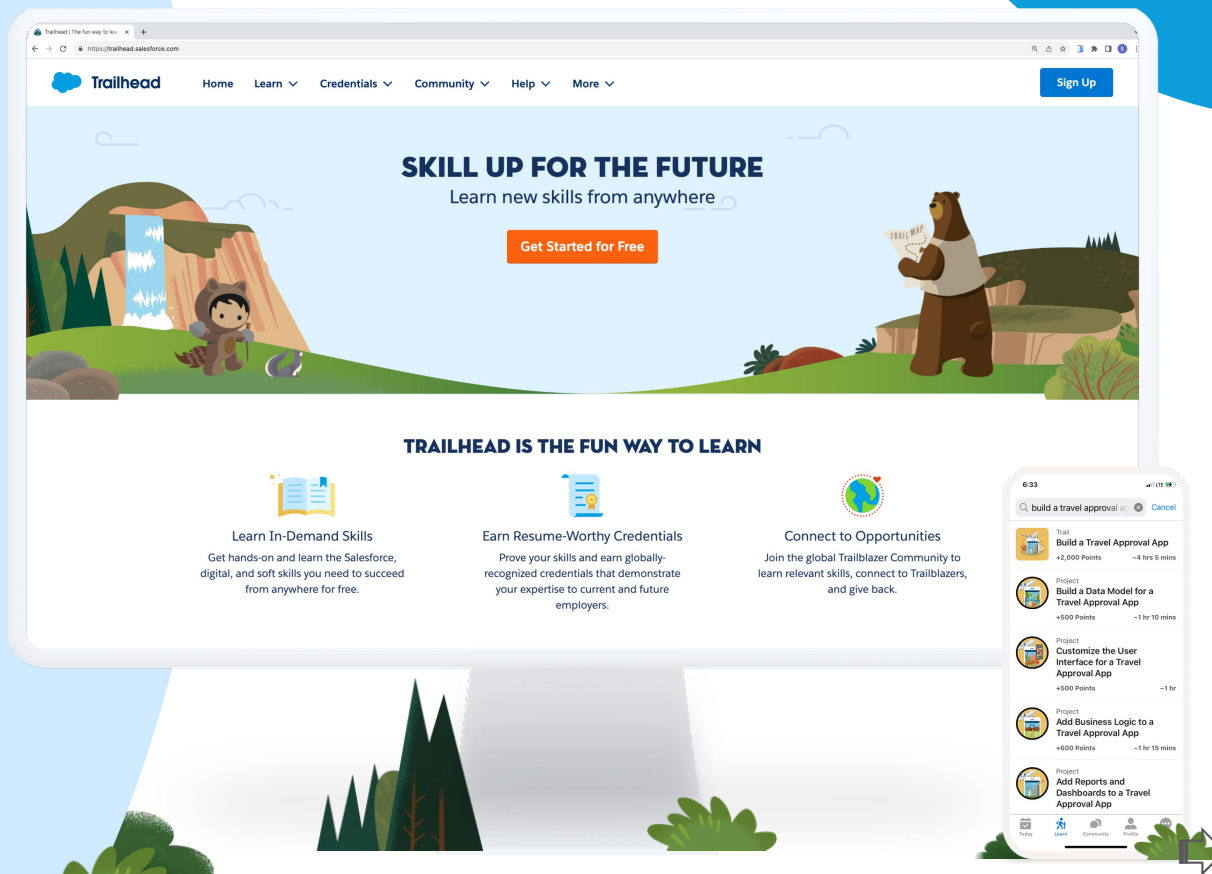
Build and practice the in-demand skills that your company needs to go digital fast



Build a Travel Approval App

<http://sfdc.co/TravelApp>

<http://www.trailhead.com>





What does Salesforce do?

Salesforce Customer 360 Platform Overview

Trailblazers

Innovate with the Customer 360 Platform

salesforce

-  Get Support with
CUSTOMER SUCCESS
-  Accelerate Time to Value with
PROFESSIONAL SVCS.
-  Install Apps and Tools from
APP EXCHANGE
-  Learn Skills & Get Certified with
TRAILHEAD



SaaS

Trailblazers Innovate with the Customer 360



Core Platform Services

Clicks, not Code Configuration for Building Powerful Apps



SALESFORCE
MOBILE



SERVICE CLOUD
VOICE



MESSAGING FOR
IN-APP/WEB



SMS
MESSAGING



KNOWLEDGE
MANAGEMENT



EINSTEIN AI /
TRUST LAYER



EINSTEIN
STUDIO



PROMPT
BUILDER



GENERATIVE
SERVICE REPLIES



CONVERSATION
SUMMARIES



EINSTEIN
BOTS



KNOWLEDGE
RECOMMENDATIONS



SEARCH
ANSWERS



NEXT
BEST ACTION



EINSTEIN FOR
DEVELOPERS



SCHEMA
BUILDER



FLOW
BUILDER



FLOW
ORCHESTRATOR



FLOW
INTEGRATION



FLOW RPA



BACKUP &
RESTORE



CODE
BUILDER



DEVOPS
CENTER



DATA
MASK



MAPS &
GIS



HYPERFORCE



SECURITY &
COMPLIANCE
(FedRAMP)



SECURITY &
PRIVACY CENTER



SALESFORCE
SHIELD



SANDBOX

PaaS

Schema Builder

The no-code builder to design, visualize and edit your own data model

Visual Data Modeling

Graphical interface for visually designing and modifying a data model. Users drag and drop objects, fields, and relationships onto the canvas.

Object Creation and Modification

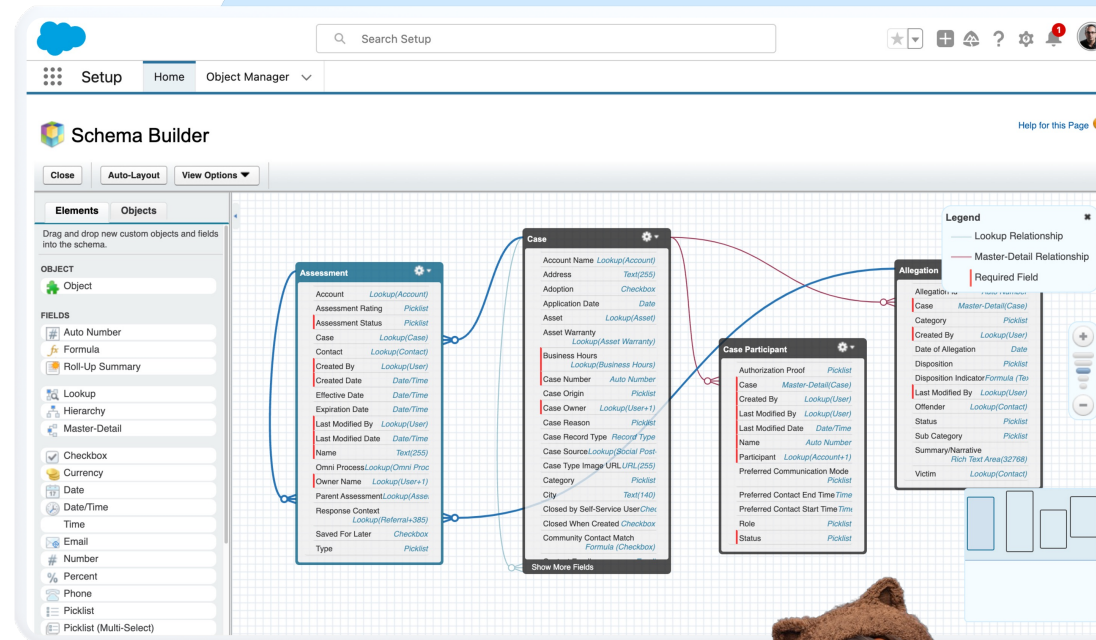
Create new custom objects or modify existing ones directly within the Schema Builder.

Relationship Mapping

Visualize and create relationships between objects, such as master-detail or lookup relationships.



Learn More
<http://sfdc.co/THSchemaBldr>



Flow Builder

Transform your organization with data-driven automation

Create triggered automation

Automatically update records or send communications based on triggering criteria

Digitize workflows with guided forms

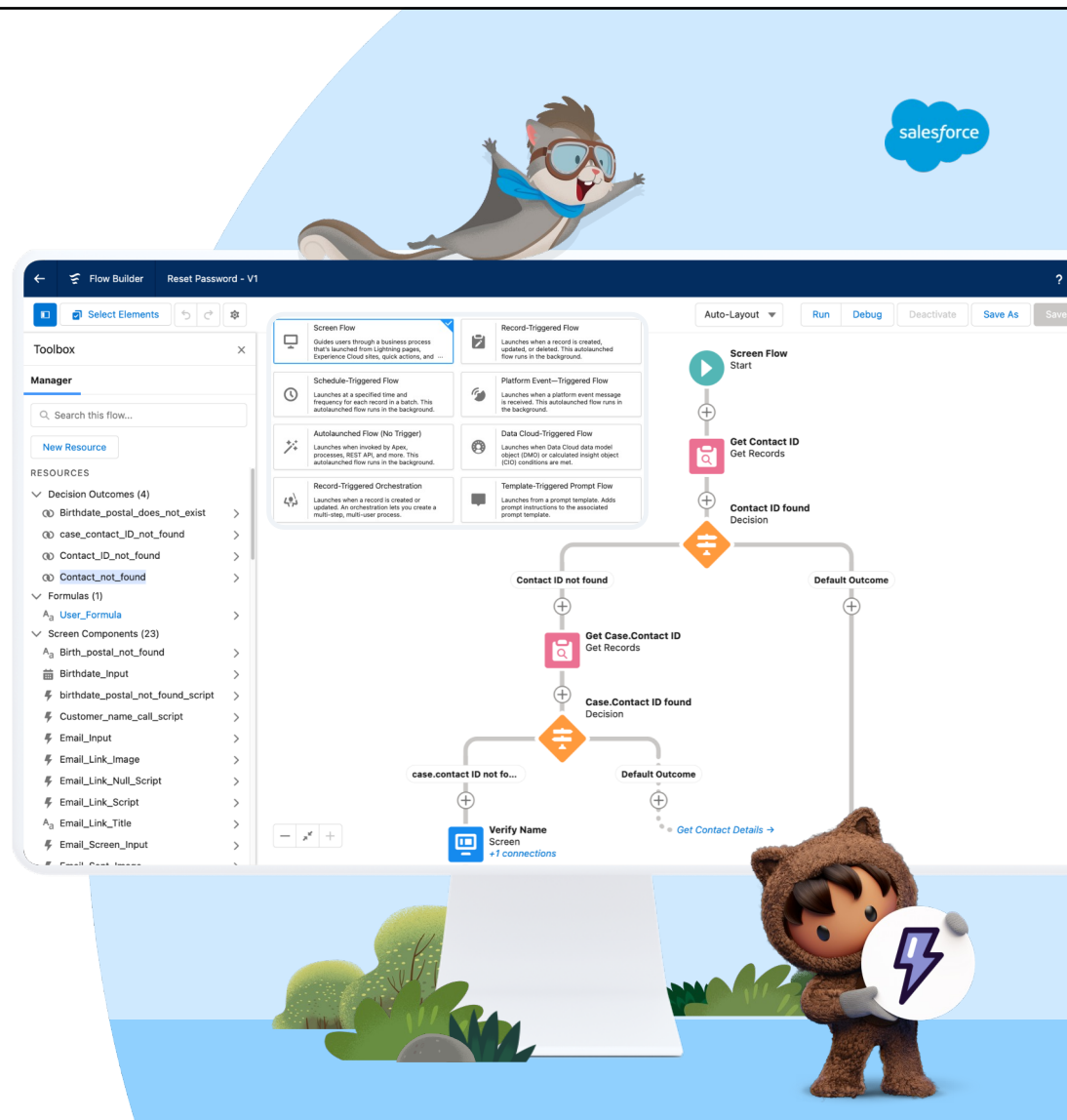
Enhance user experience and business agility with guided interactions

Automate across connected systems

Automate workflows and take actions across multiple systems



Learn More
<http://sfdc.co/THFlowBldr>



Trailblazers Innovate with Einstein 1 Service



Service Cloud

Deliver Omni-Channel Service to Your Constituents and Partners

Modernize Constituent Services on the #1 AI Service Platform



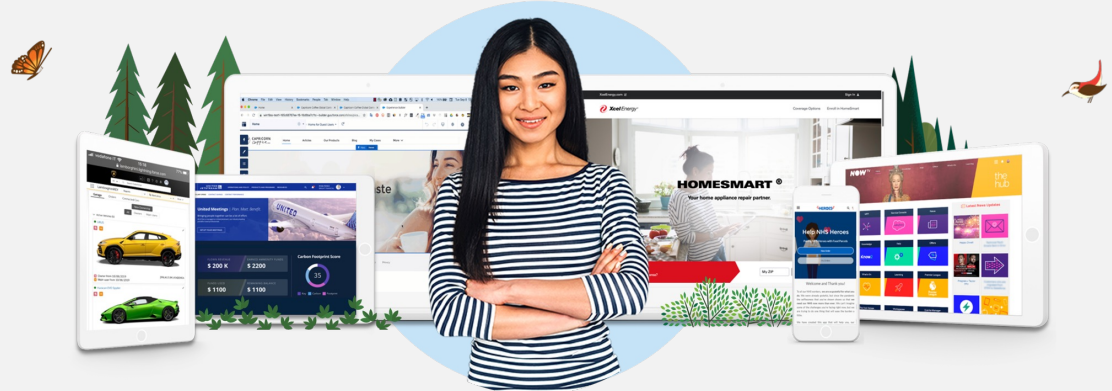
Trailblazers Innovate with Experience Cloud



Experience Cloud Portals

Bespoke Mobile Web-Responsive Sites for Customers & Partners

Deliver CRM-connected digital experiences. Fast.



Websites | Portals | Communities | Forums | Content | Process



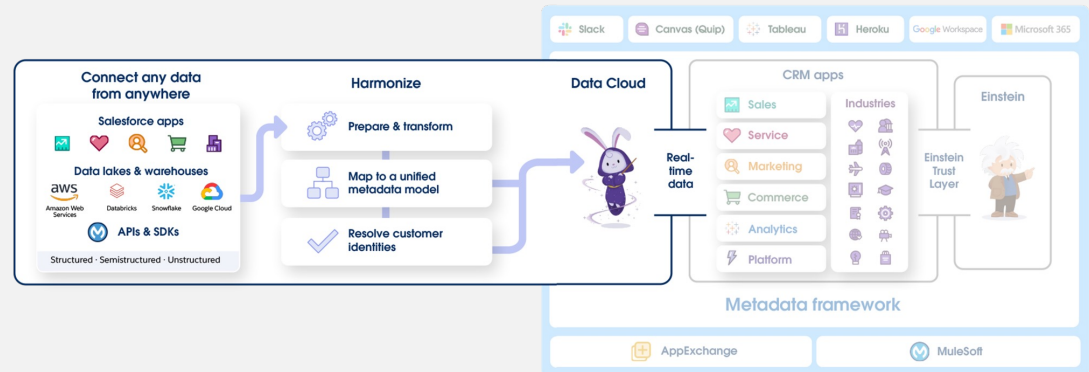
Trailblazers Innovate with Data Cloud



Data Cloud

A hyperscale data platform built into Salesforce

Data Cloud Unlocks Your Trapped Data



salesforce

The Hidden Costs Of
Implementing AI In Enterprise
Forbes

Airline held liable for its chatbot giving
passenger bad advice - what this means
for travellers

B B C

AI in the Enterprise is not so easy

A CIO canceled a Microsoft AI deal.
The reason should worry the entire
tech industry.

BUSINESS INSIDER

The Billion-Dollar Price Tag of Building AI

TIME

Manufacturers slow Gen AI rollout on
rising accuracy concerns, says study

 **Reuters**

Salesforce Einstein: Pioneering AI for CRM Since 2014

2 Trillion+

AI results per week

salesforce

xGenSales
xLAM
LLMs
CodeT5+
LLMs

Tableau
GPT

Slack
GPT

Einstein
GPT

CodeGen
LLM

ProGen
Paper

Einstein
Search

Recommendation
Builder

Conversation
Insights

Acquired
Bonobo

Paved way for
prompting with
DecaNLP paper

Prediction
Builder

Bots

Vision and
Language

Acquired
PredictionIO
& MetaMind

RelateIQ
Acquired

SFDC AI
Research
Founded

2016
Salesforce
Einstein

210 AI
patents

227 AI research
papers

2014

2015

2016

2017

2018

2019

2020

2021

2022

2023

2024



Don't DIY Your AI

Agentforce



Build AI agents, apps, & automations

Scale sales & service teams 24/7

Omni-channel engagement

Easy to build with low-code

Trusted & accurate with real-time data

Seamless handoff to humans



What is an Agent?

salesforce

Agents are proactive autonomous applications that provide specialized, always-on support to employees or customers and are equipped with the necessary business knowledge to execute specific tasks according to their role



Role

An agent's purpose on your team



Knowledge

The data an agent needs to be successful



Actions

The goals an agent can fulfill



Guardrails

The guidelines an agent can operate under



Channel

The applications where an agent gets work done



What is an Agent?

salesforce

Agents are proactive autonomous applications that provide specialized, always-on support to employees or customers and are equipped with the necessary business knowledge to execute specific tasks according to their role



Role

Service Agent
for Retail



Knowledge

All of your data
and case
history



Actions

Answers
questions &
process returns



Guardrails

Refunds up to
\$100 without
approval



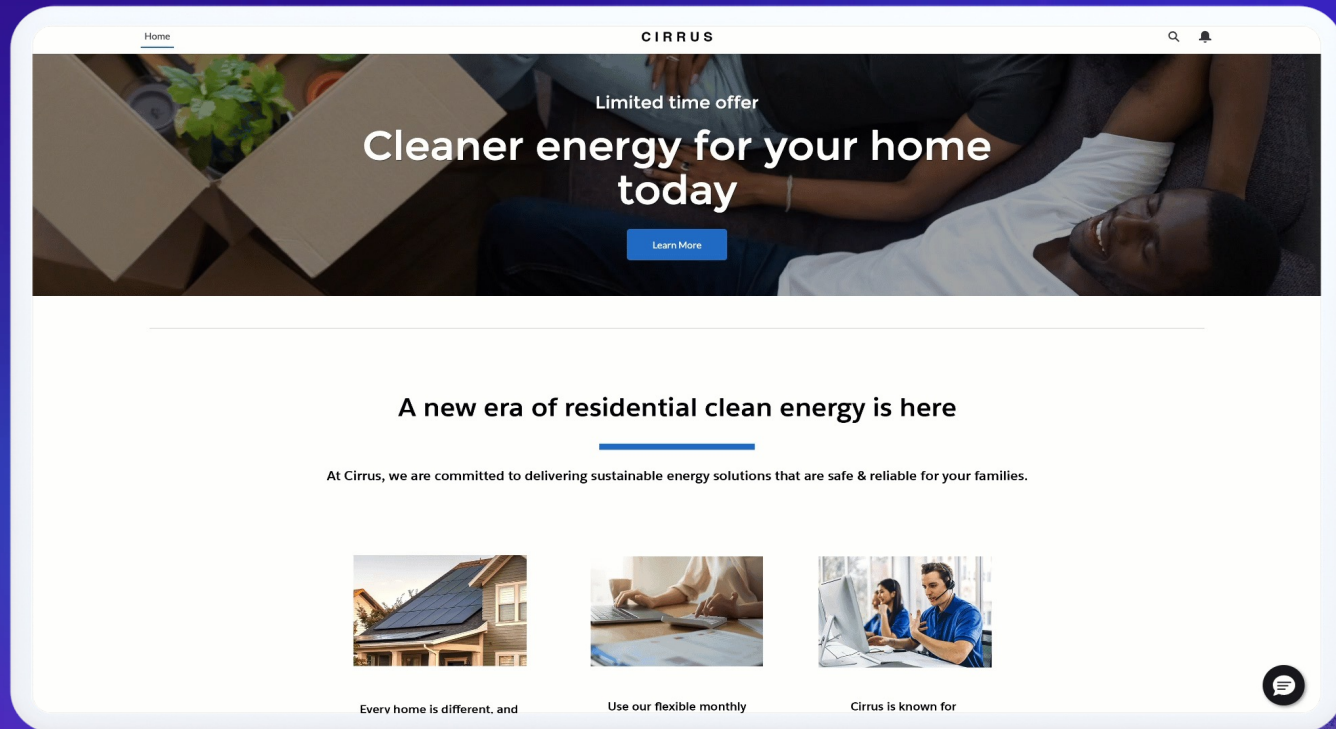
Channel

Web, Mobile,
WhatsApp,
Slack



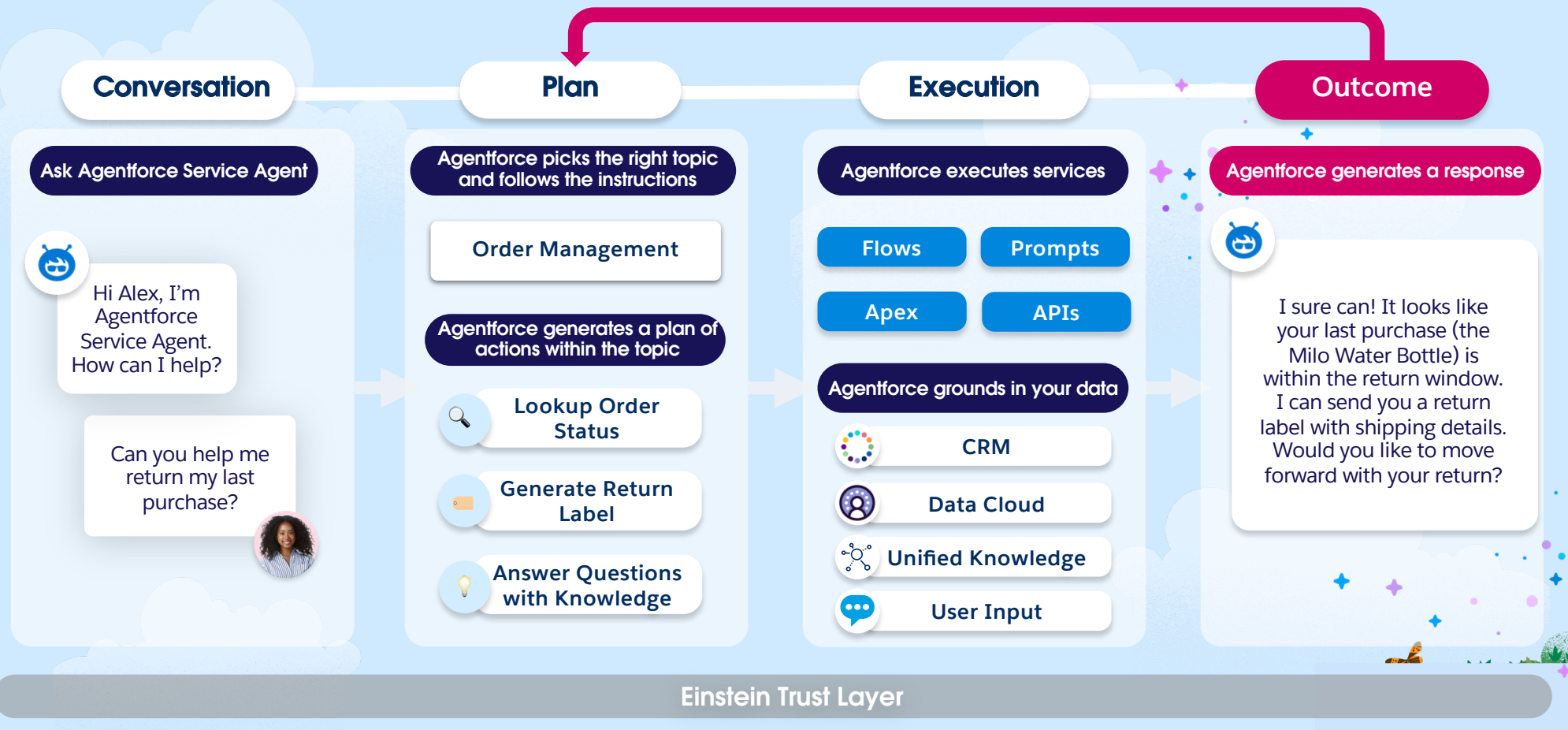
Agentforce

salesforce

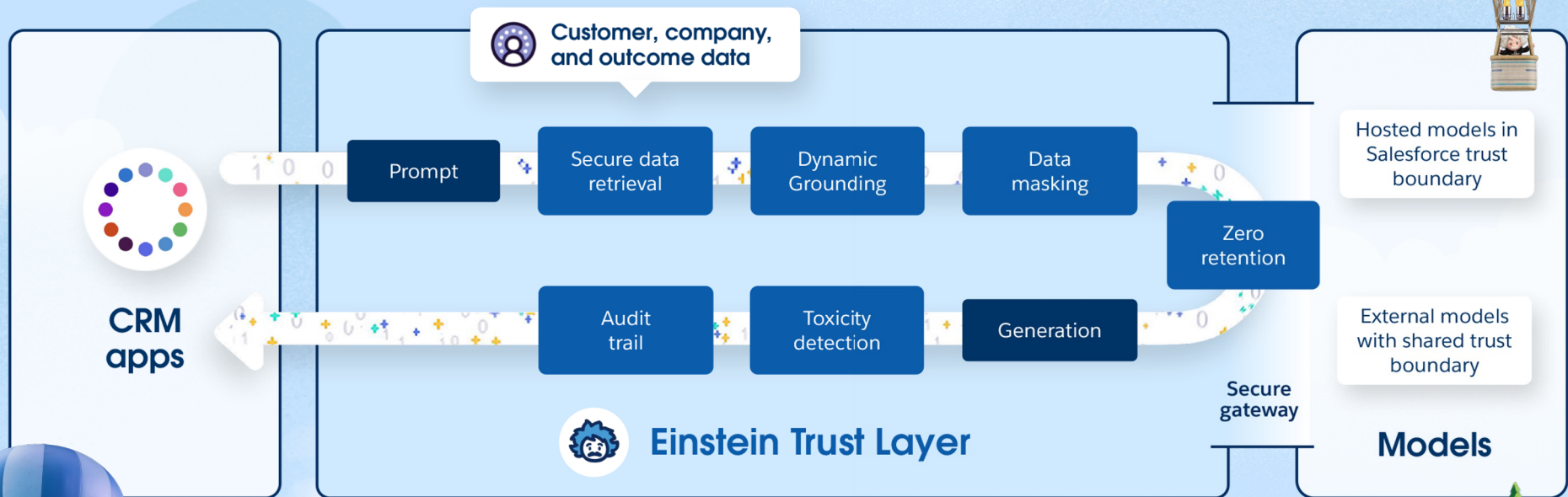


How does Agentforce work?

salesforce



How the Einstein Trust Layer Works



Trust Layer Explained (Animation)
<http://sfdc.co/TrustLayerExplainedFigma>

Agentforce

Let's Build an Agent

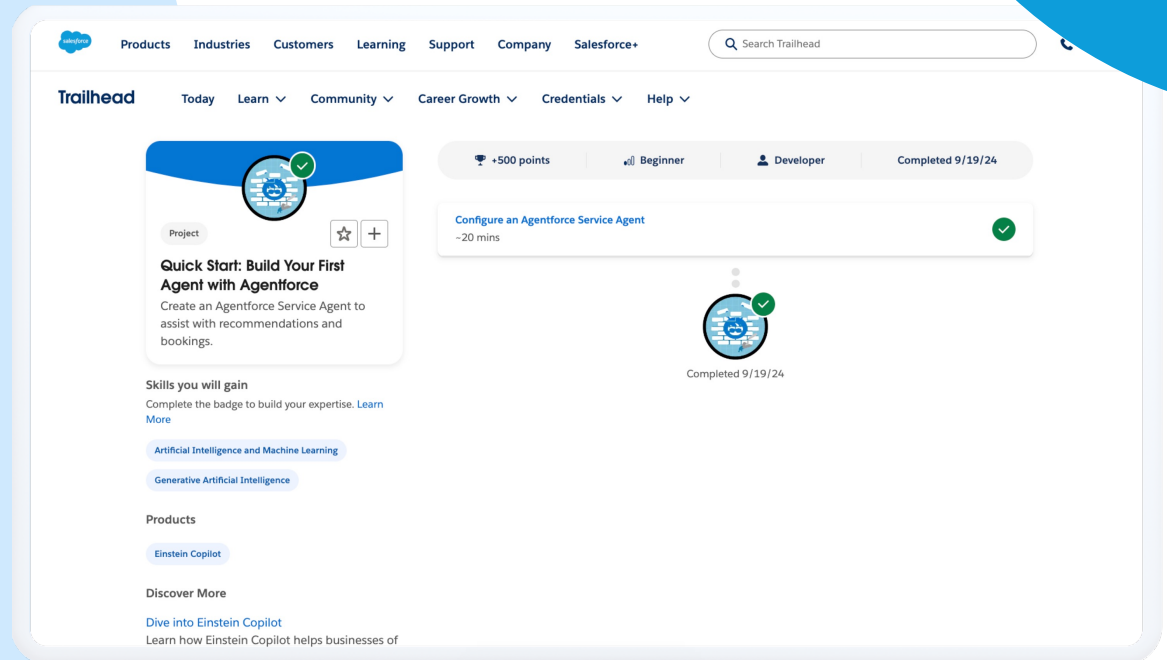


Build Your First Agent with Agentforce

Create an Agentforce Service Agent to assist customers with resort experience recommendations and bookings



<http://www.trailhead.com>



Announcing

100+

Industry-specific prompts for Agentforce

Automotive

Vehicle Telemetry Summary
Vehicle Service and Warranty Summary
Driver Profile Summary
Driver Interaction Summary
Asset Warranty Summary
Sales Agreement Summary

Media

Account Summary
Opportunity Summary
Account Competitive Summary
Market Analysis Summary
RFP Management

Nonprofit

Program and Benefits Summary
Major Donor Engagement Summary
Board Version of Application
Funding Award Summary
Programs Notes Summary
Grantmaking Notes Summary
Fundraising Notes Summary
Major Gift Proposal

Consumer Goods

Account Summary
Upsell Recommendations
Account Health Assessment
Inventory Check

Communications

Billing Anomaly Summary
Data Consumption Summary
Call Usage Summary
Running Balance Summary
Serviceability Analysis
Customer Needs Analysis
Customer Needs Summary
Product Recommendation
Competitive Pricing & Promotion Analysis
Personalized Offer Generation
Sales Pitch Generation
Offer Margin Analysis
Service Level Objective Analysis
Upsell Recommendation & Activation

Financial Services

Client Financial Plan and Goal Summary
Complaint Summary
AI Autofill Complaint Titles and Descriptions
Business Relationship Plan Interaction Summary
Client Relationship Summary
Dispute Acknowledgement Email
Dispute Resolution Email
Policyholder Account Summary
Insurance Claim Summary
Wealth Client Interaction Summary
Asset Allocation Summary

Energy & Utilities

Energy Account Service & Interaction Overview
Customer Interaction Summary
Energy Account Service Case Summary
Service Chat Summaries
Billing Summary
Bill History Insights
Rate and Usage Insights
Post Work Summary
Clean Energy Program Recommendations

Education

Recruitment Inquiry and Opportunity
Management
Intelligent Question Generator
Student Summaries
Alumni Engagement Insights
Mentoring Summaries
Skills Recommendation

Healthcare & Life Sciences

Patient Medical History
Patient Medication Summary
Patient Pre-call Summary
Healthcare Provider Summary
Patient Email Generation
Insurance Benefit Summary
Patient Assessment Generation
Patient Benefits Summary
Program Outcome Summary
Patient Outcome Summary
Call Script Generation
Candidate Auto-Matching

Manufacturing

Sales Agreement Summary
Asset Service Summary
Asset Telemetry Summary
Forecast Summary
Interaction Summary

Net Zero

ESG Report Accuracy Assessment
ESG Disclosure Report Generation
ESG Disclosure Response Refinement
ESG Disclosure Draft Generation
Emissions Categorization
Emissions Factor to Procurement Item Association
Information Library Snippet Refinement

Public Sector

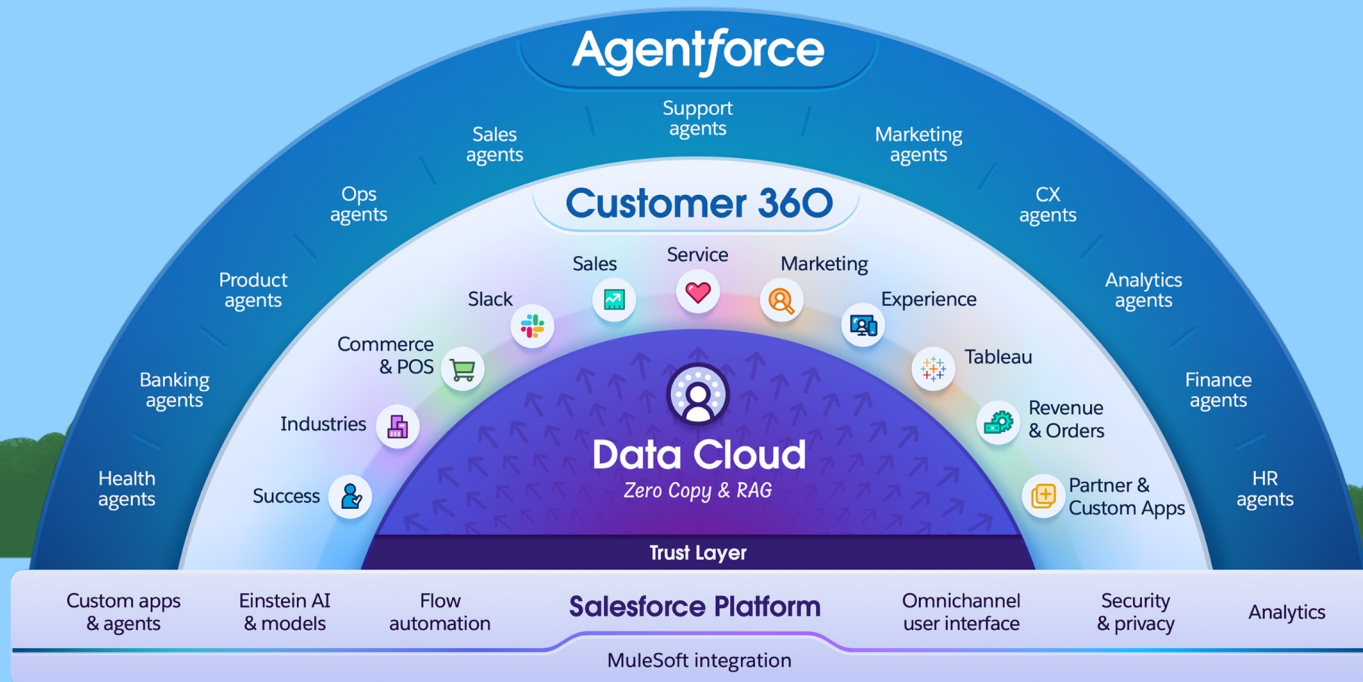
Prior Violation Report
License Compliance Summary
Application History Overview
Application Version Comparison
Document-based Digital Assessment Builder

salesforce



Browse the
Industry AI
Use Case
Library

Only the Salesforce Platform brings together Customer 360 + Data + Analytics + Agents



Agentforce

What AI was meant to be.

75%

of AI's value is in
the front office



**Augmented
employees**



**Better customer
experience**



**Higher
revenue**





Training Resources

Learn the Salesforce Platform. For Free.

Be a Trailblazer in the Salesforce Ecosystem

Build your career, community, and company with Salesforce



Learn In-Demand Skills

Start and grow your career with guided pathways and free learning from Trailhead and Salesforce+.

Connect to a Global Community

Share knowledge and support, and give back with a network of Trailblazers with the Trailblazer Community.

Create Growth and Opportunity

Succeed with the trusted Salesforce Platform and innovative AppExchange -- from building a career to launching a business.



21M
Trailblazers

Aaron McGriff
Salesforce Consultant

Gaurav Kheterpal
Architect

Sandi Zelner
Solution Architect

Trailblazer.Salesforce.com

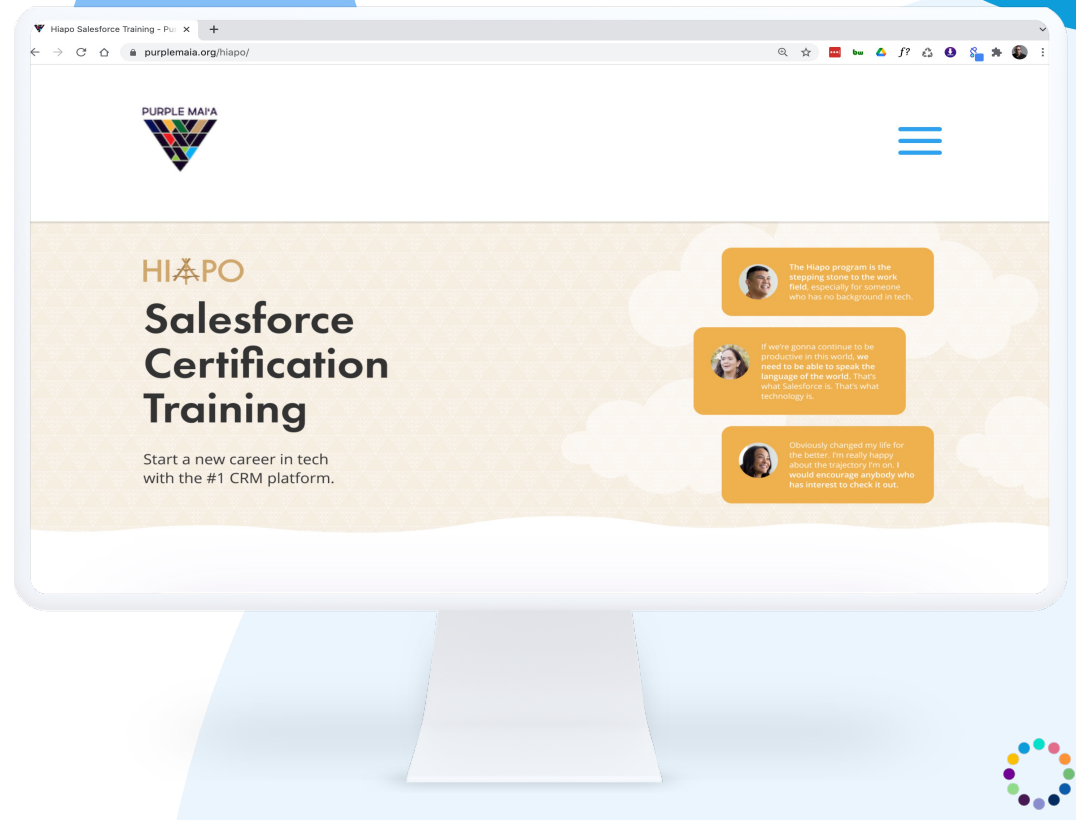
Purple Mai'a

Salesforce Certification Training

PURPLE MAI'A



<https://purplemaia.org/hiapo/>





Mahalo

