Leverage Your Data to **Build Your Agentforce**
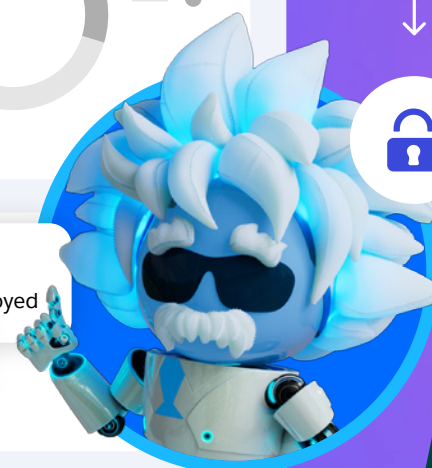
Transform customer and employee experience with Agentforce – built on your business data

salesforce

Jacob Rae · 2 min
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Future of AI

Contents

Introduction

A new bar is being set for customer and employee expectations. With AI advancements coming at breakneck speed, customer expectations are on the rise. They're looking for companies to anticipate their needs with predictive insights, suggesting relevant products or services before they express interest. They also want seamless omnichannel experiences so every interaction across websites, mobile apps, social media, and physical stores feels consistent and harmonious. If an issue occurs in their experience, they expect a quick resolution with minimal wait time.

Behind the scenes, employees are looking for better tools to help deliver great experiences for their customers. They expect solutions that provide them instant access to customer data to handle interactions with speed and personalization. They want AI to help them reduce manual workloads so they can focus on strategic, creative, and high-value work.

The ability for organizations to deliver on the vision of what customers and employees want has been limited in the past waves of AI – predominantly built around predictive capabilities, bots, and copilots. They often fell short of empowering users beyond simple suggestions and recommendations to help them complete tasks. Now, in the latest wave of AI, what was once visionary is now possible: say hello to AI agents.

Today, you can build your Agentforce – the agentic layer of the Salesforce Platform for building, securing, deploying, and managing agents – fueled by your business data that can perform tasks, uncover insights, and do work without detailed instructions for each action. Agentforce will help deliver the types of experiences your customers are looking for, at scale, while allowing your employees to spend time on delivering better outcomes and moving strategic initiatives forward. Best of all, Agentforce can do this autonomously.

This guide will discuss how, as customer and employee expectations rise, businesses turn to Agentforce, powered by their data to meet the moment. To help launch your Agentforce journey, we'll explore some of the challenges organizations have historically faced when implementing AI and explain how building your Agentforce and agentic apps on a single platform helps overcome these barriers.

01

Elevating experiences across the board with Agentforce

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Elevating experiences across the board with Agentforce

To meet rising expectations from both sides, many organizations are looking to **Agentforce** and agentic apps to leverage their data and CRM to offer unparalleled levels of personalization, efficiency, and responsiveness.

IT teams clearly understand the impact of AI and solutions like Agentforce can have on their business. In fact, **86% of IT professionals** say their job has become more important since the introduction of generative AI. With Agentforce as a game-changing AI tool that goes beyond generative AI, new external and internal use cases have become possible.

With Agentforce, you can transform how your business engages with customers and empower employees. For instance, you can deploy an agent to handle routine customer inquiries, predict customer behavior, and proactively engage with personalized solutions.

This ensures customers experience tailored, efficient service at scale. You can use Agentforce to drive campaign personalization by analyzing real-time customer data to recommend offers and promotions that align with individual preferences. In the world of commerce, Agentforce can act as a 24/7 personal shopping assistant – offering product recommendations, assisting with purchases, and tracking orders to enhance the customer experience.

Demand for external and internal apps and agents is growing, with an expected 69% increased demand for customer-facing solutions and 63% for employee-facing solutions.

3rd State of IT Report

01

Agentforce can also streamline internal operations. For example, Agentforce can summarize product availability, predict shipment delays, and provide real-time updates for your logistics teams. You can connect Agentforce with your enterprise resource planning (ERP) systems to analyze inventory levels, summarize sales trends, and support data-driven stock management decisions.

By utilizing Agentforce across your organization, every interaction is powered by a consistent and trusted data model tailored to your business. This helps maintain the accuracy, relevance, and alignment of insights, automations, and outcomes with organizational goals. With capabilities extending to every department in your organization, Agentforce not only reduces manual workloads but also delivers strategic value by allowing employees to focus on high-impact initiatives.

Next, let's look at what's been holding many businesses back from getting the most out of their AI investments and how you can better prepare your organization for success.

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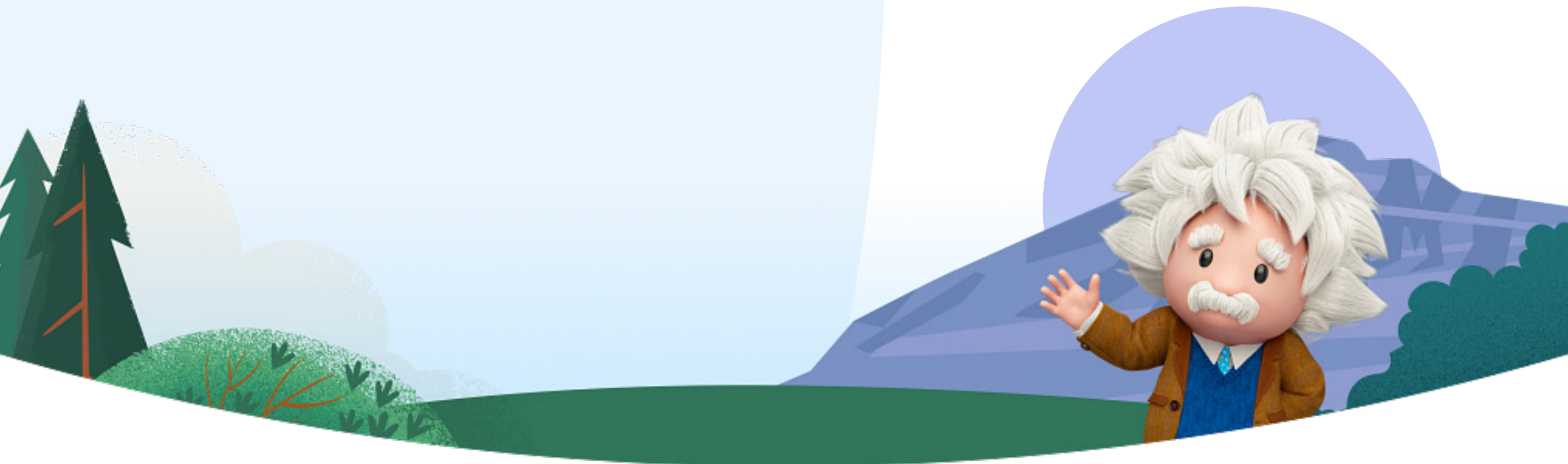
What's preventing organizations from getting the most out of AI?
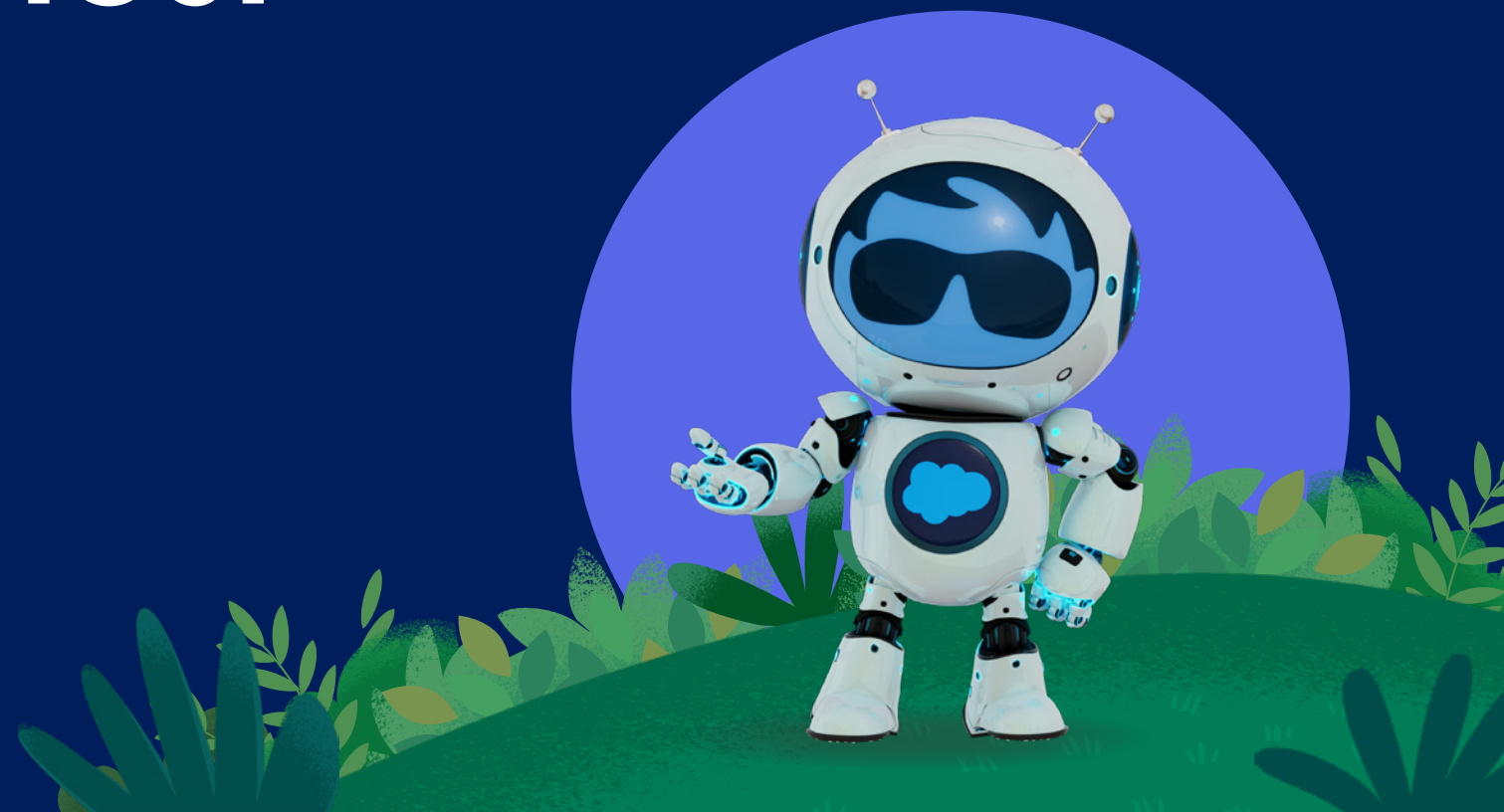
02 What's preventing organizations from getting the most out of AI?

Amid all the excitement around AI's opportunities, it's important to remember that most app development processes weren't built to accommodate AI-driven strategies. Building AI solutions requires considering the challenges that might slow your progress or reduce the value of those solutions. Then, you must map out a strategy that helps your team avoid those roadblocks and support fast, reliable AI app and agent development.

As organizations strive to build AI solutions that deliver value, they often encounter challenges that complicate the process. These challenges include data silos, inconsistent data formats, poor data quality, and difficulties in data integration. Such issues hinder the ability of AI solutions to access and learn from the necessary information, leading to less accurate and useful outcomes.

Challenge: Fragmented customer data, disconnected systems, and difficulty integrating processes and workflows

Building fast, exceptional AI experiences relies on having well-connected data, as well as integrated systems, processes, and workflows. Unfortunately, integration also happens to be one of the biggest hurdles in development. According to the 3rd State of IT Report, **80% of IT leaders** say that integration challenges slow down their transformation initiatives.

Fragmented data and disconnected systems prevent the seamless integration of customer data across different platforms – both on and off the cloud – which complicates the development of effective AI solutions. Today, only around **29% of applications** are connected, and a staggering 95% of IT leaders report integration as the top barrier for integrating AI into existing processes.

Data fragmentation results in inconsistent and incomplete customer data, which AI needs for training and decision-making. As a result, the potential for AI to provide accurate and actionable insights goes down. The inability to integrate and harmonize data means that most organizations aren't adequately equipped to effectively build AI apps and agents internally, limiting the overall effectiveness of their solutions in enhancing customer and employee experiences.

81% of organizations identified data integration as one of the most significant challenges they face when implementing AI.
MuleSoft Connectivity Benchmark Report

88% of IT leaders view system and application integration as critical for both customer and employee experiences.
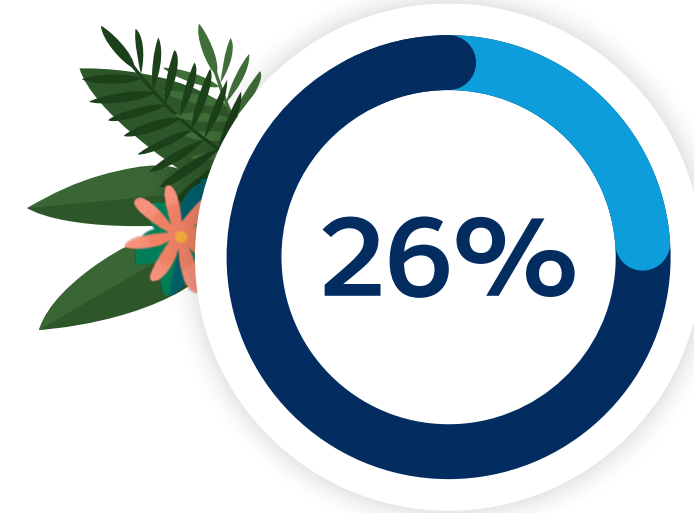3rd State of IT Report

02

Challenge: A gap between business expectations and IT resources

Another major challenge is a lack of developer resources amid a growing demand for IT innovation. According to the 3rd State of IT Report, most IT leaders feel they can't keep pace with the growing demands from the business side, with **62% acknowledging** a gap between what is being asked for and what can be done. This issue is magnified in the realm of AI, where specialized skills are needed to develop and deploy effective solutions.

Nearly three in five IT professionals feel that business stakeholders have unrealistic expectations regarding the speed and agility of new technology implementations, including AI. This disconnect can lead to unmet expectations on both sides, as business leaders push for rapid AI adoption while IT teams face a growing backlog of projects.

These backlogs can get highly problematic in AI development, where timely delivery is crucial for maintaining a competitive edge. The strain on IT resources means that many AI projects are delayed,under-resourced, or scrapped altogether. Addressing this challenge requires giving developers the necessary resources for AI innovation and improving the alignment between IT capabilities and organizational goals.

26%

Only 26% of IT departments can support all development requests.

3rd State of IT Report

79%

About 79% of IT professionals cite business leadership's demand for AI implementation as a significant stressor.

AI-IT Disconnect

02

Challenge: IT teams need time to understand the AI landscape

While it's thrilling to imagine the possibilities that AI has for building exceptional customer and employee experiences, there are still many unknowns. Fast innovation is necessary for staying competitive, but balancing speed with security is also important. AI comes with some risks, and developers need adequate time and tools to hone new skills and learn how to avoid AI pitfalls.

It's understood today that AI solutions can potentially create ethical concerns. Issues like bias, privacy violations, and unintended consequences in decision-making processes have the potential to affect individuals and society negatively. With **64% of IT leaders** acknowledging that they're worried about the ethics of generative AI, it's clear that developers need time to acclimate to the AI landscape.

Without proper training and time to adapt, developers risk creating AI solutions that perpetuate biases or produce inaccurate results, such as hallucinations. To minimize these risks, investing in continuous learning and development programs is important so developers stay updated with best practices and ethical guidelines in AI development.

It also helps to use developer tools with safety and privacy mechanisms built into their features, allowing developers to uphold ethical standards as they build. This approach not only improves the quality of AI solutions but also instills trust in customers and stakeholders who are increasingly vigilant about the ethical implications of AI.
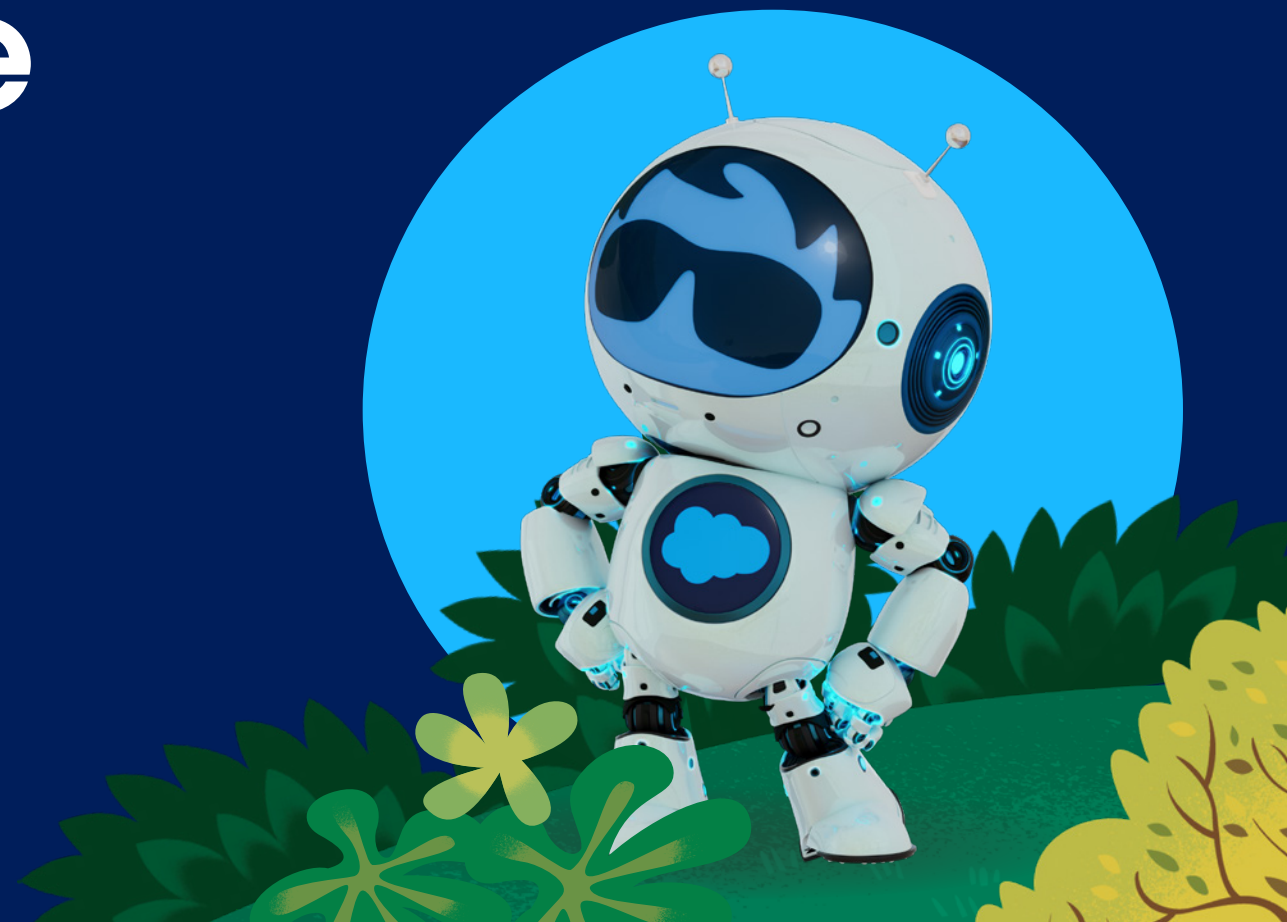
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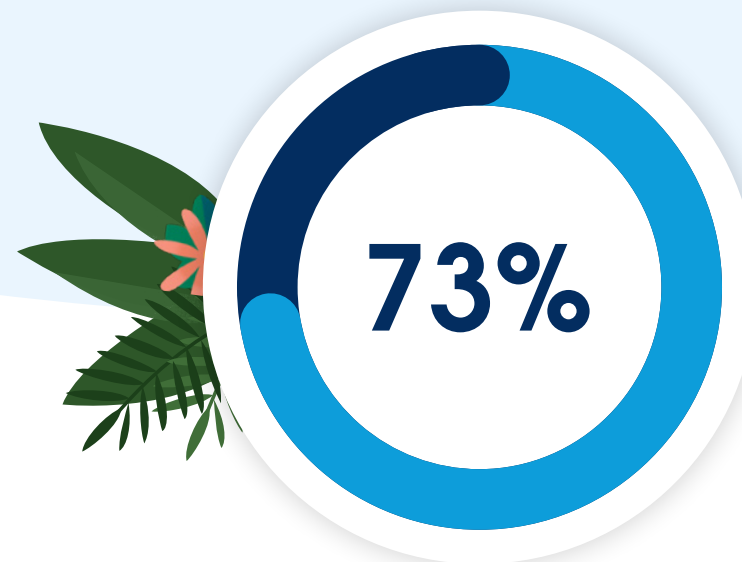
Approximately 73% of IT leaders are concerned about bias in AI.
Generative AI in IT Survey

03

Four strategies to effectively build your Agentforce

03

Four strategies to effectively build your Agentforce

Building AI solutions comes with challenges, especially if your organization is trying a DIY approach. However, with the right partner and strategy, getting the most out of your AI investments is within reach.

Enter Agentforce.

By following these four strategies and building your Agentforce on the Salesforce Platform, you can streamline AI development and transform your customer and employee experiences.

1: Build trust from day one

In the rapidly evolving landscape of AI, trust is the cornerstone of any organization's strategy to implement AI into their business processes. As AI agents become more autonomous and capable of independent action, robust governance frameworks that ensure ethical use, data security, and unbiased decision-making are key.

Organizations must prioritize trust from day one by adopting transparent, applicable, and auditable AI practices. Stakeholders should have clarity into how AI decisions are made. Meanwhile, developers also play a critical role in this trust ecosystem. They need tools that promote innovation, ensure data protection, and uphold ethical standards in a trusted environment for building and testing AI solutions before deployment.
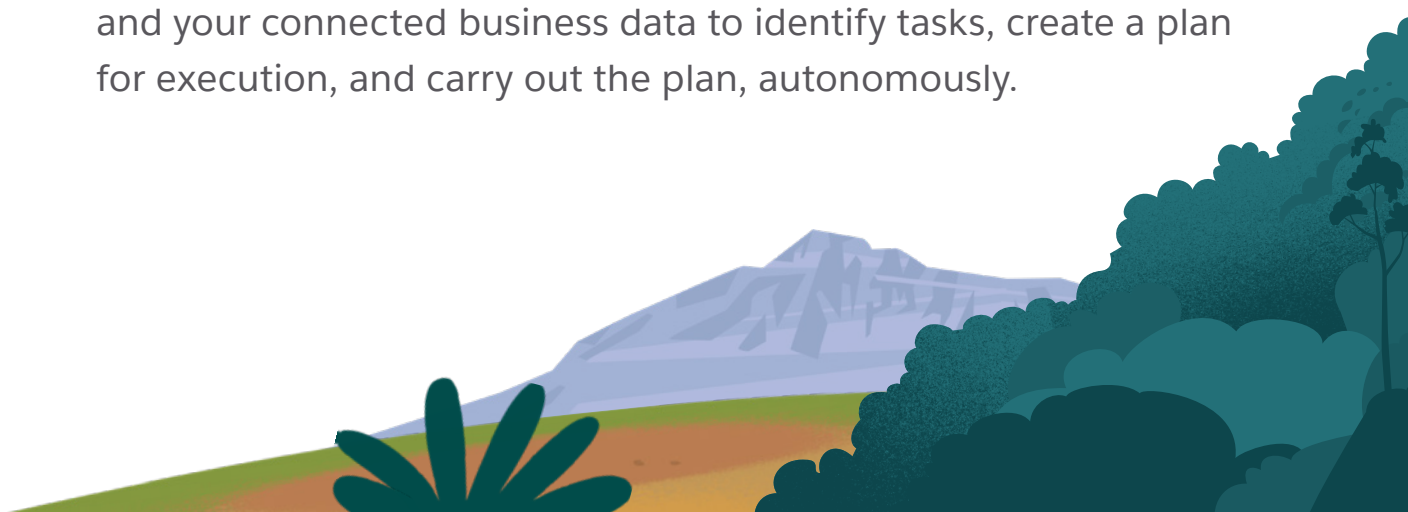
68% of customers say advances in AI make it more important for companies to be trustworthy.

State of the Connected Customer Report

The **Einstein Trust Layer** acts as a guardrail that helps organizations balance AI safety and productivity. It does this by gating data access through user permissions, masking AI prompts to protect personally identifiable information (PII) and other sensitive data, retaining zero data used in LLMs outside of Salesforce, performing toxicity checks on outputs, and storing interactions with AI in a customer-owned audit trail and feedback store.

Agentforce is the complete AI system that integrates data, AI, automation, and humans to deploy AI agents for concrete business outcomes, all built on our Trust Layer. It equips your teams with tools, services, and agents that can tap into the power of an LLM and your connected business data to identify tasks, create a plan for execution, and carry out the plan, autonomously.

03

2: Govern your AI app and agent lifecycles effectively

Creating reliable, ethical, and effective AI apps and agents requires governance at every development and deployment stage. It involves establishing policies, procedures, and standards to guide the development process, ensuring accountability and transparency.

Governance in AI app and agent development is particularly important in DevSecOps processes and application lifecycle management (ALM), where integrating and continuously delivering AI solutions requires rigorous testing, quality assurance, and compliance with regulatory standards. Governance helps balance speed and stability, allowing teams to deploy AI apps and agents quickly while meeting quality and ethical benchmarks.

Low-code tools are vital in governance and AI app and agent development. They democratize the development process by allowing administrators and individuals without app development expertise to build AI solutions. Low-code platforms often include pre-built governance frameworks, helping maintain consistency, compliance, and control over AI solutions. These tools reduce reliance on specialized development teams and help eliminate project backlogs, accelerating the deployment of AI applications and agents to meet organizational needs.

77%
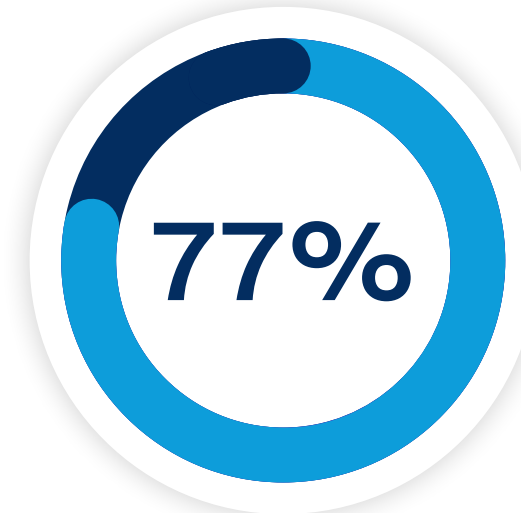
77% of IT departments use low-code and no-code tools to reduce development timelines.

3rd State of IT Report

Agent Builder is the low-code builder for Agentforce. It gives your teams the power to create and customize autonomous AI agents for any role, industry, or use case. It allows you to integrate structured and unstructured data, add capabilities through topics and action libraries, and build, engage, and amend agent actions all in natural language.
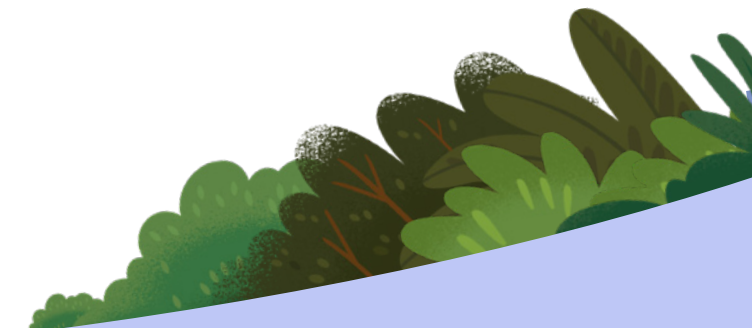
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3: Turn Salesforce into your single source of truth for all AI-driven experiences

Your CRM is a central component of building AI-powered customer experiences. It collects and analyzes data to create a 360-degree view of customers, helping you better understand their needs so you can consistently deliver better experiences. Integrating your AI apps and agents with your CRM will enhance your ability to predict customer needs, provide timely solutions, and automate responses.

However, your customers aren't the only ones looking for better experiences. Building employee apps on the same platform as your CRM apps can add significant value. When employee tools are integrated with CRM data, employees gain access to comprehensive customer insights that empower them to deliver personalized and efficient service in their workflow.

Integration also helps keep departments aligned, reducing misunderstandings and improving communication. When employees leverage the same trusted data, they're better positioned to make informed decisions, enhance productivity, and contribute to a consistent customer experience.

For our customers, Salesforce delivers a single source of truth by uniting data across your business into one view of the customer across departments. Agentforce and employees can take action around this shared customer view to improve experiences, increase productivity, and drive revenue.

Using your CRM as a single source of truth eliminates data silos and establishes an authoritative data source that everyone in the organization can reference and trust.

03

4: Prepare your data for Agentforce and AI innovation

Data is critical in developing AI solutions that drive business impact. It fuels algorithms that drive personalized experiences, predictive analytics, and intelligent automation.

Structured data – such as customer demographics, purchase history, and interaction logs – is typically organized in databases and easily searchable. This data is used to identify patterns and make predictions. Unstructured data, including text, images, audio, and video, is leveraged by AI for tasks like natural language processing, sentiment analysis, and visual recognition. Both data types are essential for creating comprehensive AI solutions that understand and anticipate customer needs.

Many organizations, however, are not using their data to its full potential. To effectively store and connect both structured and unstructured data, they need a data platform native to their CRM.

Using a data lakehouse native to AI development, like **Salesforce Data Cloud**, allows businesses to connect CRM data with external data lakes and warehouses seamlessly. This allows them to harness more value from their data, regardless of where it's coming from or what type it is.

A data lake can store vast amounts of structured and unstructured data in its natural format. With unstructured data specifically, teams can use low-code AI builders to create retrieval augmented generation (RAG) workflows. This facilitates the fast retrieval of contextually relevant information the moment it's needed, such

as in the middle of a customer call or while troubleshooting a product issue, driving productivity through semantic search against your data.

The benefits of using a native data lakehouse architecture alongside CRM to build AI apps and agents are significant. It provides a unified repository of data that can be accessed and analyzed in real time, allowing organizations to respond swiftly to customer behaviors and market trends.

Additionally, an open and extensible architecture helps organizations to innovate more effectively in a rapidly evolving technological landscape. With the ability to use data from existing lakes and warehouses without creating duplicates, teams can build apps faster using their current data and AI models. This extensibility helps create stronger AI solutions that use diverse datasets for accurate, comprehensive insights.

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With Data Cloud, you can bring together all of your structured and unstructured data from any source and harmonize it to create unified customer profiles. These profiles are the trusted data source that will power your Agentforce and every agent action, automation, and insight.

Following these four strategies will help you leverage your organization's data to build your Agentforce and confidently execute your AI vision. Now, let's dive into the tools that help you on your journey.

94%
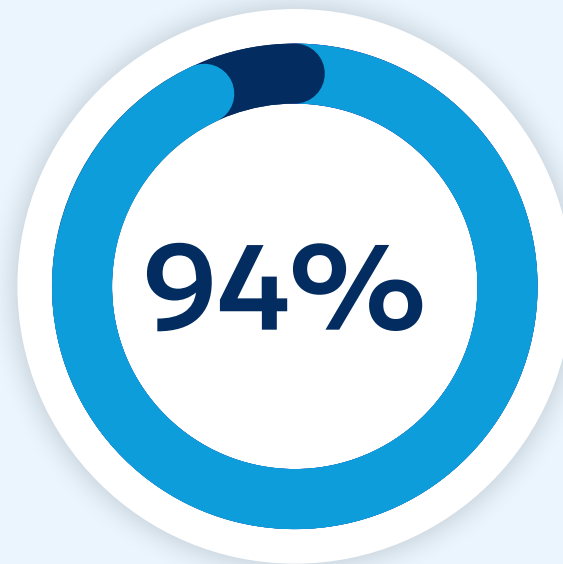
94% of business leaders believe they should get more value from their data

State of Data and Analytics Report

04

How the Salesforce Platform helps

04 How the Salesforce Platform helps

The **Salesforce Platform** empowers IT teams to simplify the complex landscape of AI app development, providing a suite of robust tools that streamline the app-building process. By integrating best practices for data management, solution testing, and deployment, the Salesforce Platform mitigates common AI challenges, helping developers and business leadership bring their AI app strategies to life while avoiding roadblocks and delays.

Using a single platform for AI app development can significantly speed up your ability to deliver apps tailored to the specific needs of different business units. The Salesforce Platform provides a unified, collaborative environment that supports everyone involved, from coding beginners to seasoned professionals. This means you can build AI apps more efficiently, ensuring that all parts of your organization benefit from the power of AI.

No-code and low-code tools

Agent Builder: Enhance CRM functionality with easy drag-and-drop features and create agents that automate business processes or help customers access vital information.
Learn more

Flow: Use out-of-the-box, reusable building blocks to create automated solutions that can be extended across any app, document, or legacy system.
Learn more

Prompt Builder: Empower admins and developers to create trusted, reusable AI prompts that summarize and generate content without coding.
Learn more

Pro-code tools

Code Builder: Enable admins and developers to collaborate on the same project in the cloud and manage your code in a single central repository.
Learn more

Agentforce for Developers: Use Apex code generation to help developers translate ideas into code using natural language prompts and enforce coding best practices.
Learn more

Code Analyzer: Automate code review and analyze source code in different languages to ensure quality and security.
Learn more

DevOps tools

DevOps Center: Track the entire app lifecycle management process in one place from design to deployment.
Learn more

Scale Test: Reduce the risk of costly downtime or data loss during high-traffic periods by identifying potential issues before they affect operations.
Learn more

Sandboxes: Give developers a risk-free space to hone their skills with specialized environments that mirror the production setting of a Salesforce instance.
Learn more

04 Customer stories

Learn how these organizations used the Salesforce Platform to overcome IT obstacles and power their app development initiatives.

V VONAGE

Vonage, a global leader in cloud communications, aims to create seamless technology for users. When a round of acquisitions introduced new tools and systems, the company found itself with siloed datasets and increased manual processes. Without a comprehensive view of customer data, the company turned to Salesforce Platform to unify its teams around a single customer view and manage its change at scale. With Salesforce Platform's low-code capabilities, anyone in the business can build quickly, freeing engineers and IT to focus on developing innovative solutions.

Read the story

A | THE ADECCO GROUP

Adecco Group, a global recruitment leader serving clients like Amazon and Uber, struggled to provide personalized, scalable services to millions of applicants, responding to only a fraction of 300 million annual applications due to limited tools and sheer volume. With Agentforce, Adecco has revolutionized its recruitment process, automating administrative tasks like resume screening, shortlisting, and posting jobs across multiple platforms. This frees recruiters to offer 1:1 support at scale, suggest alternative roles to rejected candidates, and deliver empathetic, tailored experiences. By customizing Agentforce's features and fine-tuning preferences, Adecco fulfills its mission to be a trusted, lifelong career partner for every job seeker.

Read the story

Accelerate your
Agentforce journey

Accelerate your AI journey

Salesforce Platform is a trusted, dynamic platform designed to help IT teams overcome common roadblocks to fast, efficient AI app and agent development. Its integrated CRM capabilities unify data, processes, and workflows across the organization, ensuring a single, comprehensive view of customer information. It also provides a range of low-code tools, empowering teams to quickly build Agentforce, freeing them to further focus on innovation.

The platform's robust governance, security, and compliance features also help ensure your AI solutions are developed responsibly and ethically.

Successfully executing on your vision for AI relies on having a solid foundation. Before starting development, assess your organization's unique challenges, IT skill sets, architecture, and app and agent development toolkit. Explore the Salesforce Platform's tools and capabilities to see how it can support and accelerate your initiatives.

Learn more about Salesforce Sandboxes

Learn more about Salesforce DevSecOps

Explore Agentforce

Contact an Expert