salesforce

The Agentforce Guide for Healthcare and Life Sciences

How to become an agent-first health organization with always-on, digital labor support for patients, employees, and customers

The priorities of healthcare and life sciences organizations have evolved and grown over the past decade. What began as the industry's Triple Aim – focused on reducing healthcare costs, enhancing patient experiences, and improving population health – has gradually expanded to a Quadruple Aim that now includes improving the provider experience.

Yet, achieving this aim in an already strained industry is no easy feat. Between an aging patient population and a growing workforce shortage, there are often more jobs to be done than resources available, forcing healthcare professionals to further allocate their time to a growing list of administrative tasks. Combine this with fragmented data, disparate applications, paper forms, and manual tasks, and it quickly leads to mounting inefficiencies and staff burnout.

Who pays the price? Patients, members, and customers – who must endure longer wait times, inaccessible or more expensive care, disconnected experiences, and slower time to therapy. And providers suffer too, as they're constantly pulled away from their most important job of providing care.

Healthcare and life sciences organizations are well aware of one key solution: to find ways to boost efficiency by doing more with less. In fact, over 80%[1] of healthcare leaders believe organizations that effectively adopt AI will be more efficient and agile, and that AI will positively impact the patient/member experience (79%) and patient/member outcomes (75%). Yet, until now, AI has taken a reactionary role, responding to rules and human prompts to complete tasks.

What if AI could act as a digital labor force, taking autonomous action to make healthcare and life sciences processes easier?

[1] Applications of AI in healthcare& Life Sciences, 2024 Study

Contents

CHAPTER 01

The Next Wave of AI

For more than a decade, Salesforce has been at the forefront of AI and healthcare innovation, from pioneering the first predictive AI for CRM to introducing generative AI tools like chatbots and copilots. Chatbots opened the door to conversational AI, simplifying common tasks and personalizing patient interactions based on pre-defined rules. Then, copilots upped the ante with assistant-like automation that could answer questions and generate content using natural language grounded in customer data.

But none of these solutions could reason or take action independently.

AI's third era? Agentic AI, bringing together the versatility and flexibility of large language models (LLMs) and the precision of traditional programming. Agents are built to achieve specific goals and even consider the consequences of their actions to make smarter decisions. This means AI can now be fully autonomous, working beside humans as a digital labor force to relieve administrative burdens without compromising trust.

From jumpstarting patient recruitment and scheduling appointments to streamlining clinical trials and advanced therapy, Agentic AI plays a pivotal role in enhancing efficiency, reducing errors, and personalizing patient care.

Know Your AI

Chatbots
automate repetitive tasks via fixed rules

Copilots
offer tailored, intelligent assistance

AI Agents
take action autonomously at scale through learning and reason

CHAPTER 02

Agentforce for Healthcare and Life Sciences

Agentforce isn't simply a new solution. It's a paradigm shift – an all-new layer in the Salesforce Platform and a game changer for the way healthcare and life sciences organizations get work done. Unlike copilots, Agentforce acts as a digital workforce that can reason over data and tap into workflows to take action on behalf of overwhelmed teams.

Agentforce supports countless use cases in healthcare and life sciences out of the box, while providing endless opportunities for further customization. By deploying Agentforce, you can:

- **Bring relief to your strapped workforce** with intelligent assistance that works alongside humans to get jobs in patient and member services, provider education, care coordination, sales and market engagement, public health data management, and other areas done faster and more efficiently.

- **Make smarter, faster decisions** with Agentforce, which can anticipate, plan, and reason by adapting to new information, operating within guardrails defined by your organization.

- **Automate entire workflows** and ensure seamless coordination and hand-off between Agentforce and human employees, facilitating trusted collaboration across every department in your healthcare or life sciences organization.

Connect Agentforce to any of your enterprise data without having to train AI models first. Then, let Agentforce take action on your existing workflows, code, and APIs and augment any business function powered by the Atlas Reasoning Engine, the brain behind Agentforce.

Whether you're taking your first steps into AI or you're well into your adoption, you can deploy Agentforce at any level of human intervention. Whereas autonomous agents are programmed to perform actions with human-like skills within set guardrails, assistive agents are embedded in the flow of work as buttons and conversational UI to augment human actions.

🤖 **AGENTFORCE IN ACTION**

TRANSCEND

Transcend offers always-on personalized telehealth with Agentforce.

Transcend connects people with licensed professionals for wellness services like hormone replacement, thyroid management, and sexual health through personalized telehealth. The company's extensive growth during the pandemic revealed inefficiencies in manual processes like juggling multiple systems and platforms, which hindered patient care and employee productivity. With Agentforce, Transcend can streamline workflows, improve response times, and automate eligibility checks, reducing specialists' workloads. Data Cloud and Health Cloud further enhance efficiency by centralizing patient data, improving safety, and ensuring HIPAA compliance, while enabling personalized care. The new system is expected to increase patient satisfaction, reduce manual tasks by 40%, and speed up the ordering process, helping Transcend meet growth goals and provide better service.

Keep Reading >>

100% **boost in specialist productivity**
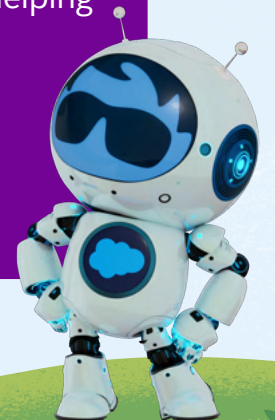
CHAPTER 03

Health AI is an Agentforce Multiplier

Agentforce	+	Health AI	=	Outcomes
Roles & Topics		Domain-specific user personas & workflows		Solve domain-specific customer problems
Data Cloud		Industry data models & 3rd party connectors		More accuracy with better grounding
Actions		Industry features & process library		Agentforce "just works" w/ plug & play actions
Channels		Industry apps & external extensions		Intuitive value, where work already happens
Trust Layer		Industries compliance (e.g. HIPAA, FedRAMP)		Enhanced Trust for regulated customers

The true power of Agentforce lies in its industry-specific applications and ability to understand clinical data and processes out of the box. Salesforce's healthcare and life sciences industry applications and AI capabilities come together to inform Agentforce so you can:

- Solve domain-specific challenges.

- Increase data accuracy with better grounding in industry data models.

- Plug and play across a library of more than 2,000 industry processes.

- Provide intuitive value where work already happens, resulting in an instinctive user experience.

- Enhance trust and compliance in industry-specific regulations like HIPAA and FedRAMP.

When applied to the healthcare and life sciences industry, ready-to-use AI helps automate time-consuming tasks like matching the right patients to clinical trials, retrieving electronic health records for contact center staff, or verifying pharmacy benefits before a new clinical trial starts. And by building on industry-specific data models, workflows, APIs, and prompt templates, autonomous AI agents can take action without having to worry about HIPAA or FedRAMP compliance.

AGENTFORCE IN ACTION

Precina

Precina Health transforms diabetes care management with Agentforce and Health Cloud.

To scale its high-touch diabetes care services into underserved rural areas, Precina needed to update its infrastructure, integrate clinical data and patient management processes, and improve communication with insurers – without hiring thousands of people. Now, Agentforce will enable daily connections between providers and patients to improve their health faster. Agents will work seamlessly with Health Cloud and Data Cloud to instantly access patient data, surface important interventions from FAQs, and create tailored health plans – all while maintaining HIPAA compliance.

Keep Reading >>

95% cost reduction in patient acquisition

CHAPTER 04

Where Can Agentforce Help in Healthcare and Life Sciences?

Salesforce brings humans with agents together to help you contextualize clinical and non-clinical data into a 360-degree view, automate processes, and drive actionable intelligence.

Agentforce addresses both out-of-the-box and customized solutions for:

Patient/Member Access and Services

- Finding the right provider
- Contact center inquiries and FAQs with EHR data fetching and patient summaries
- Medical/pharmacy/DME coverage verification
- Financial assistance
- Care plan creation and updates aligned with industry standards
- Prior authorization and reimbursements

Provider Engagement and Education

- Provider identification and onboarding
- Roster file management
- Healthcare provider (HCP) and key opinion leader (KOL) insights and pre-call planning
- Continuing medical education for licensure and health system requirements
- Provider data feedback for quality management, triaging, and responding to HCP/patient questions

Clinical Trials

- Site selection and activation
- Candidate matching
- Participant recruitment
- Study startup and design
- Safety and compliance monitoring
- Budgeting and contract management

Care Coordination and Management

- Appointment scheduling
- Home health coordination
- Behavioral health immediate client response

Sales and Market Engagement

- Benefits sales and administration
- Life sciences commercial operations and order management
- Patient acquisition

Public Health Data Management

- Disease surveillance case classification and deduplication
- Trend identification and intervention recommendations
- Immunization campaign generation

CHAPTER 05

Trusted Data Powers Trusted Results

Data is the fuel for all AI capabilities – and the healthcare and life sciences industry generates more than its fair share. That's why we've built the Atlas Reasoning Engine with a proprietary form of retrieval augmented generation (RAG) to search across all your data. This includes both structured data (like CRM, third-party apps, and APIs in data lakes and warehouses) and unstructured data (like conversation apps, emails, and meeting software), which now accounts for 90% of an enterprise's information, according to IDC[2].

Unlike traditional RAG systems, the Atlas Reasoning Engine offers improved accuracy, completeness, and adaptability, resulting in the highest accuracy and lowest hallucinations possible. Plus, a secure trust layer makes it possible for healthcare and life sciences organizations to achieve the highest levels of trust with their patients, providers, members, and customers. And because Salesforce's data solutions are embedded alongside your proprietary data, you can benefit from both predictive and generative AI without compromising patient data.

Rising Trends

According to recent Salesforce customer insights[3], generating business value from unstructured data is a top priority for CIOs across industries.

[2] The Untapped Value of Unstructured Data, IDC (sponsored by Box), 2023
[3] Salesforce CIO Interviews, November 2024

Built for Compliance

Salesforce remains committed to the secure protection of your data. That's why Agentforce is designed to adhere to industry-specific regulations and standards, including:

☑ HIPAA with coverage in our Business Associate Addendum (as of November 2024)

☑ SOC 2, SOC 3, and ISO 27001

☑ General Data Protection Regulation (GDPR)

Visit our compliance page for the latest standards updates.

🤖 **AGENTFORCE IN ACTION**

Pacific Clinics

Pacific Clinics provides immediate mental health support with Agentforce.

Pacific Clinics, a leading provider of behavioral health and support services, directly addresses California's mental health crisis. As a nonprofit, the agency focuses on providing care, hope and solutions to communities that need their services. Agentforce will advance Pacific Clinics' Enhanced Care Management (ECM) program's capacity through Compassionate Autonomous Agents with 24/7 outreach, offering immediate resources to information and connecting individuals to the agency's dedicated clinical team. Agentforce takes action on leads from Salesforce's Marketing Cloud-powered outreach, allowing the agency and its partners to increase its reach in its statewide ECM program, ensuring round-the-clock scheduling and information access at any time.

The Role of Data Cloud

Data Cloud plays a critical role in Agentforce's next-generation capabilities. A hyperscale data engine on the Salesforce Platform, it provides all of the data and metadata Agentforce needs to produce actionable insights grounded in your organizational records.

With Data Cloud, Agentforce not only has access to every relevant piece of your organization's trusted enterprise knowledge, but also understands its context, enabling intelligent, actionable, and trusted recommendations in real time.

The role of Data Cloud is three-fold:

1. Connect

Connect data at scale, from internal and external sources, with declarative connectors and programmatic APIs. This includes all sources, from existing Salesforce data and zero copy data lakes to third-party apps and unstructured sources like PDFs, emails, and chats.

2. Harmonize

Build unified patient, provider, member, and customer profiles that adapt to behavioral activity in real time, enabling a true 360-degree view of your constituent.

3. Activate

Use unified data across the 360-degree view for intelligent marketing and CRM experiences, robust visualizations at scale, and grounded AI prompts in applications like patient engagement, care management, medtech sales, clinical trials, and more.

By providing deep platform integration, trusted contextual data, and autonomous actions in the flow of work, Data Cloud ensures Agentforce has access to the most comprehensive patient, provider, or member views to enable smarter, more impactful agents.
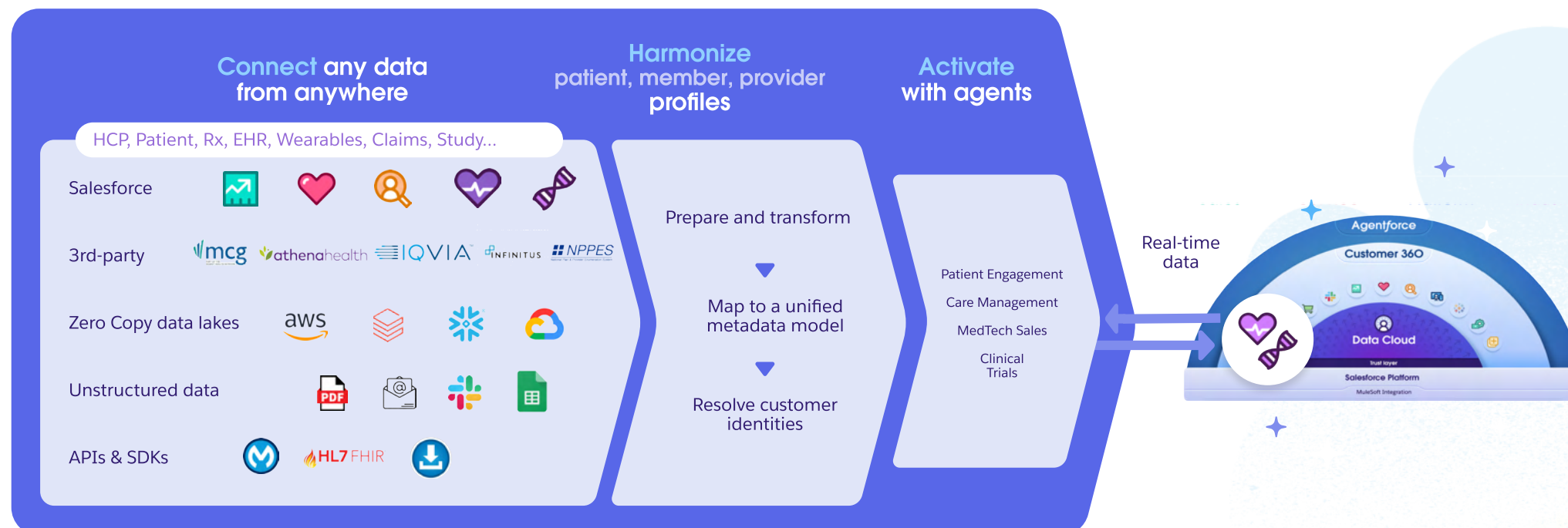
CHAPTER 06

Agentforce Promotes Smoother Change Management

No AI adoption happens overnight. Naturally, challenges arise as humans learn to work with changing technology and adapt to a new normal. In fact, executives say 70% of all AI transformations fall short of expectations, according to Boston Consulting Group[4].

Traditionally, teams have faced challenges at all levels when adopting any new process, especially AI. Individual employees may be resistant to change, fearing job displacement or skill gaps that require additional training. Or, a lack of true understanding around how AI models work can lead to ethical concerns and lack of trust. Sometimes, the process of change management itself can demotivate teams, as traditional methods place too much emphasis on data and process overhauls or risk mitigation, losing sight of the end goal.

A values- and outcomes-based approach can bring faster and easier Agentforce success.

Instead of leading with a "change mindset," healthcare and life sciences leaders should adopt a "learning mindset," tracking adoption value along the way. A successful Agentforce adoption will include:

- **Starting and iterating** as you go instead of waiting for total preparedness

- **Measuring KPIs** along the way

- **Educating stakeholders** about your project goals and the long-term implications of AI to build stronger internal support

- **Encouraging feedback loops** and demonstrating how stakeholders will receive value from the AI
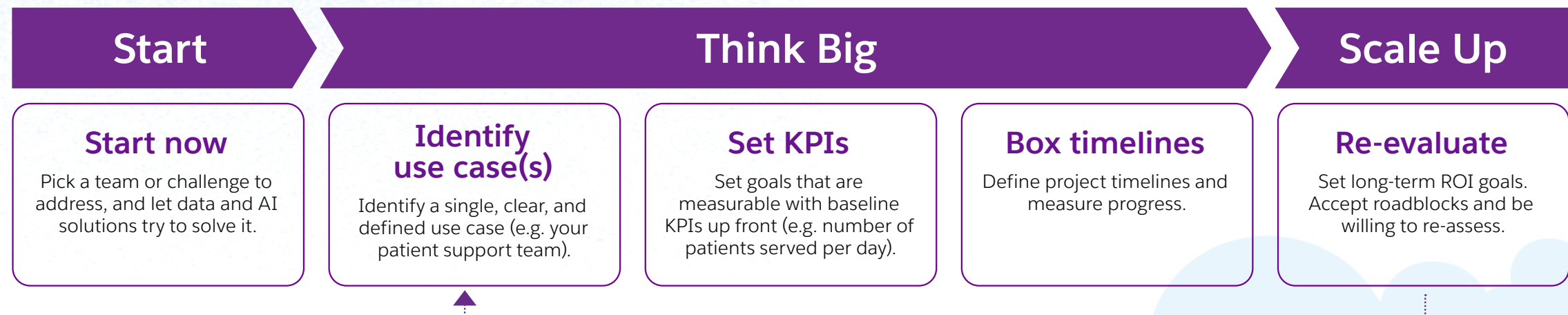
Lastly, give your transformation efforts a broader purpose. By telling the stories of patients, providers, members, and customers who can benefit from Agentforce and an always-on digital labor force, you can achieve a healthier and more values-based approach to change. Lives change when AI takes on use cases that affect entire families or society as a whole – from predicting disease progression to better managing chronic illnesses.

---

[4]   Artificial Intelligence at Scale, BCG, 2024

CHAPTER 07

Realize Value by Taking the First Step

Successfully adopting Agentforce starts with simply putting it in practice.

Start	Think Big			Scale Up

Start now	**Identify use case(s)**	**Set KPIs**	**Box timelines**	**Re-evaluate**
Pick a team or challenge to address, and let data and AI solutions try to solve it.	Identify a single, clear, and defined use case (e.g. your patient support team).	Set goals that are measurable with baseline KPIs up front (e.g. number of patients served per day).	Define project timelines and measure progress.	Set long-term ROI goals. Accept roadblocks and be willing to re-assess.

Assess Your Potential with the Agentforce ROI Calculator

See what Agentforce can do for your healthcare or life sciences organization with your unique variable, such as number of employees, costs, and time.

Try the ROI Calculator

🤖 AGENTFORCE IN ACTION

WELLNESS EXTRACT

Wellness Extract uses Agents to inform practitioners, educate patients, and improve support.

Wellness Extract needed to drive website traffic and personalized recommendations for its vitamin and supplements customers. The company also needed to offer 24/7 customer service and self-service options to keep up with online competitors. With Agentforce, the company can autonomously manage inquiries and educational questions from consumers, practitioners, and wholesalers through its website. And with access to Wellness Extract's knowledge base, Agentforce will deliver personalized, insightful customer responses with recommended dosages, tailored FAQ responses, and relevant products based on the customer's preexisting conditions.

Keep Reading>>

> " Agentforce is the only tool which can take us to that kind of scalability where we are able to touch the highest number of lives. "
>
> **Virender Dass**
> CEO

CONCLUSION

Build Healthier Connections with Agentforce

AI is no longer an experimental idea of the future. It's here and now. Getting started can be daunting, but necessary considering the changing tides of the healthcare and life sciences industry, from aging populations to rising costs. Payers, providers, pharmaceutical, medical technology, and public sector health companies alike must find avenues to incorporate AI into their daily processes in a way that's equally fast, efficient, and compliant to meet the needs of patients and employees.

Agentforce is the industry's answer to getting more work done and providing better care without exhausting more resources.

Through Agentforce, our groundbreaking suite of customizable skills, Salesforce brings autonomous AI, unified data from any source, and best-in-class Customer 360 apps together on a single, integrated, and compliant platform. We harmonize all your healthcare and life sciences data – from EHRs and CRMs to claims databases and clinical trial management systems – to take action across every process and customer touchpoint. With Agentforce, you can finally provide the autonomous, intelligent assistance to optimize patient relationships, augment care teams, reduce administrative burden, and improve margins.

Learn More