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Become An Agentic Enterprise

A discussion guide for your team

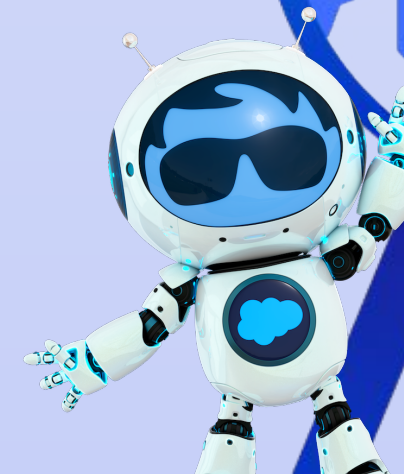


Chapters

1 Welcome to the Agentic Enterprise

2 How Do You Become An Agentic Enterprise?

3 More Resources



Welcome to the Agentic Enterprise

Where humans & agents drive
success together

No lead left behind

Service that never sleeps

IT tickets resolved in seconds

Engineering at the speed of thought

Every employee is elevated



Why Every Enterprise Must Become An **Agentic Enterprise**



Scale

Do more with less - automate manual work, reduce costs, and handle higher volumes without adding headcount

**VOLKSWAGEN
GROUP**

**3x faster
case resolution**

Monetize

Drive revenue - accelerate sales, improve conversions, and expand your market reach with intelligent insights



**Zero Leads
left behind**

Simplify

Make work easier, streamline complex processes, enable self-service, and create seamless experiences for employees and customers



**75% customer
satisfaction scores**

Salesforce's top agentic use cases



We enable our
Sellers



Sales

Automates and streamlines lead to cash processes for Sellers

Lead Nurturing

Automates pipeline 24/7 through personalized product Q&A, meeting booking, and emails

Sales Coach

Provides consistent coaching for every rep through: role play, handling objections, and negotiation

We improve the
Employee Experience



Employee

Streamlines employee knowledge access, automates routine tasks, & drives career development



IT Support

Provides human-free instant issue support for IT Support requests

HR Support

Drives HR support case resolution by reviewing similar cases and proposing next steps



Manager

Supports manager effectiveness by providing relevant data & analyzing employee sentiment

We streamline our
External Engagement



Salesforce Help

Accelerates 24/7 case resolution for **60M** annual visits

Salesforce.com

Provides 24/7 conversational product support, handing off to Sales

Events

Acts as Dreamforce & global events concierge, with session ideas, agenda mgmt, & venue navigation

Partner Community

Supports Partners with 24/7 self-service Q&A, tailored responses, and automation of Trial Org Extensions

We drive
Operational Efficiency



Engineering

Provides proactive insights and drives actions to drive developer productivity

Procurement

Tracks PR status, supplier onboarding, and answering FAQs

Audit

Automates select audit tasks, generates insights, and supports auditors



Data

Provides unified interface for all data, reporting, and analytics needs



Services Delivery

Drives program mgmt success by automating routine tasks



Agent Available in Slack & Web

How Do You Become An Agentic Enterprise?



Become An Agentic Enterprise

Your step-by-step guide

1 Envision Your AI-Powered Future

2 Prepare & Inspire Your People for the Future

3 Begin With The Right Use Case

4 Create Business Processes That Think

5 Ground Agents in Trusted, Reliable Data

6 Elevate Teams with Humans & Agents Together

7 Test, Tune, and Iterate

8 Measure Value and Impact

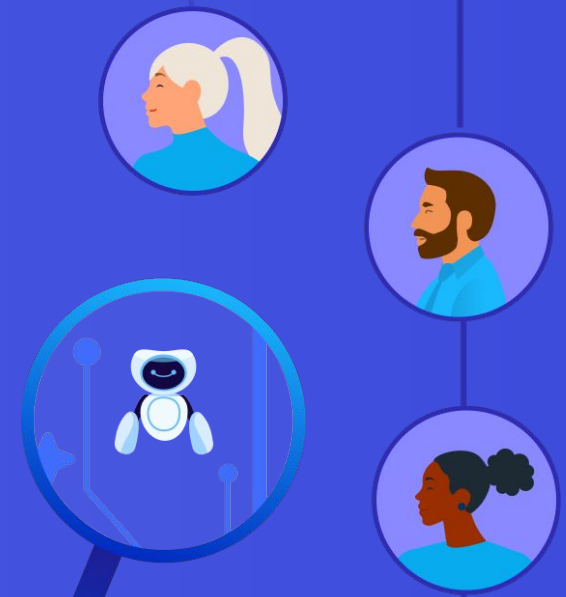
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Become An Agentic Enterprise

Your step-by-step guide

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Envision Your AI-Powered Future

Align on a Vision and Operating Model

Begin with “What If” - Start with vision, not tech

Start with a clear vision for why your organization is pursuing AI agents, focused on core business outcomes, not just new technology. Position agents as scaling capabilities across teams, and think about how AI adoption can expand business and team impact.

Stand up your operating model

Create a network of leaders across the business to define functional strategy and drive momentum.

Build on a trusted, unified platform

Assess your AI readiness, and then implement a framework for ethical use and governance to build trust. Integrate data and systems to fast-track your AI adoption and impact. Connect every new tool to your single source of truth.



Zota, a global payments platform and POS provider, is an Agentic Enterprise:

1 agent → 30+ agents

180k inquiries handled

500k merchants supported

Scaling 140 employees to perform like 800.

What We Did

Envision Your AI-Powered Future



As a company, our vision centered around Humans and Agents driving success together, assembling an enterprise-wide A-team of business and technology leaders to prioritize and build agents.

Our Year 1 Focus

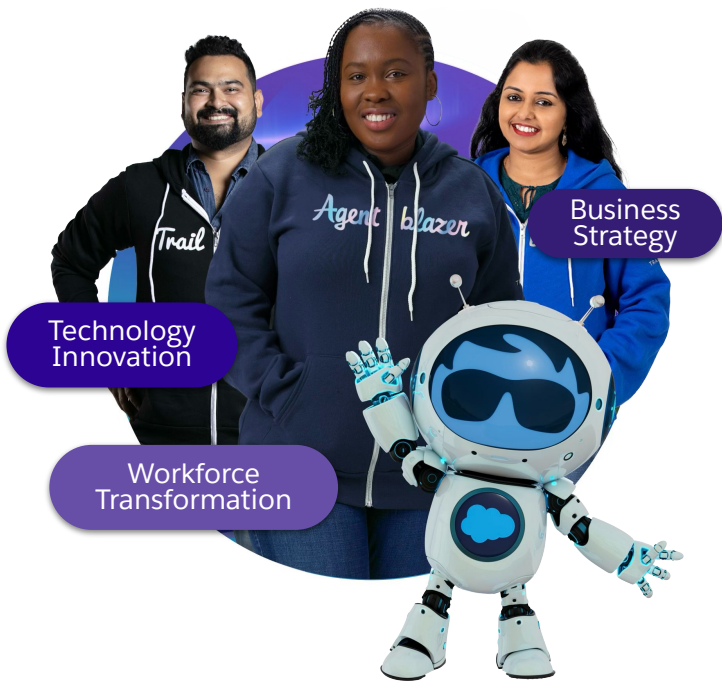
We focused on making a small number of Hero Agents great, embracing new ways of working, and thoughtfully expanding our portfolio

- Scaling of Hero Agent
- Product Innovation
- New Ways of Working
- Testing, Tuning, Refinement

Looking to Year 2

We're building a cohesive & unified user experience, orchestrated by a master intelligent routing agent, creating a future of limitless growth and capacity

A Broad Network of Collaboration



- Legal
- Customer Service
- Finance
- Global Security
- Marketing
- Real Estate
- Sales
- Events
- Technology
- Professional Services
- Partner
- Security
- M&A
- HR
- Impact

We're all responsible for prioritizing & building agents

Get Started

Envision Your AI-Powered Future

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Discussion

What are the primary business outcomes you'd like to see from pursuing AI agents for your organization?

Who across your organization should be involved in developing and implementing your AI strategy?

What's your organization's current AI maturity & readiness?

ACTIVITY! Complete your [AI vision statement worksheet](#) - define your strategic vision, cross-functional goals, and expected impact.

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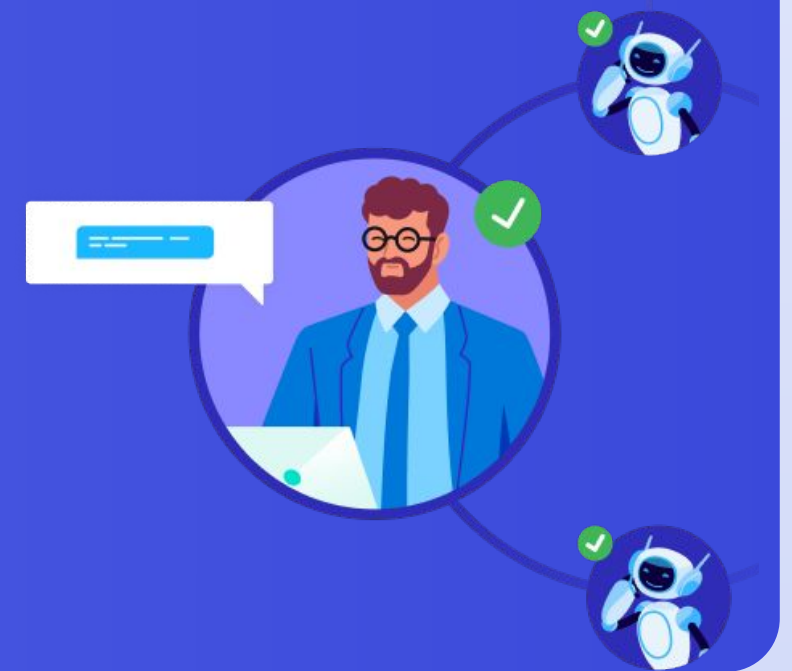
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Prepare & Inspire Your People for the Future

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Build a Human + Agent Workforce

Be transparent from day one

Create a shared understanding of your vision - and provide your employees with AI training, learning sessions, and regular updates.

Create safe spaces to experiment

Offer hands-on, low-risk sessions, frame failures as learning opportunities.

Build clear decision frameworks

Define criteria for when to use AI agents vs. human judgment; otherwise, employees will either over-rely or avoid AI entirely.

Establish feedback loops

Show impact by having employees report agent feedback; without this, trust in technology and leadership will erode.

Follow the 4Rs of Workforce Transformation

Use our Playbook to redesign work, reskill your employees, redeploy talent, and rebalance human and agent work

The image shows the Salesforce logo, which consists of the word "salesforce" in its characteristic blue font. In this version, the letter "o" in "on" is replaced by a blue circle containing the word "on" in white, creating a visual pun on the word "online" or "on-demand".

Our “Four Rs” for Workforce Transformation:

- Redesign jobs for human-agent collaboration
- Reskill employees via learning programs
- Redeploy talent to growth roles with AI support
- Rebalance human-digital workforce mix

Prepare & Inspire Your People for the Future

To successfully achieve this transformation, we prepared our people to embrace new ways of working by redesigning, reskilling, redeploying, and rebalancing the partnership between humans and agents.

Redesign how work gets done.

Build the human and agent workflow.
Augment human judgement and creativity with AI speed and scale.

Reskill your people.

Equip employees with the skills needed to guide, lead, and scale with agents.

Redeploy talent to unlock agility.

Move beyond static roles to enable people to flex, adapt, and focus on high impact work.

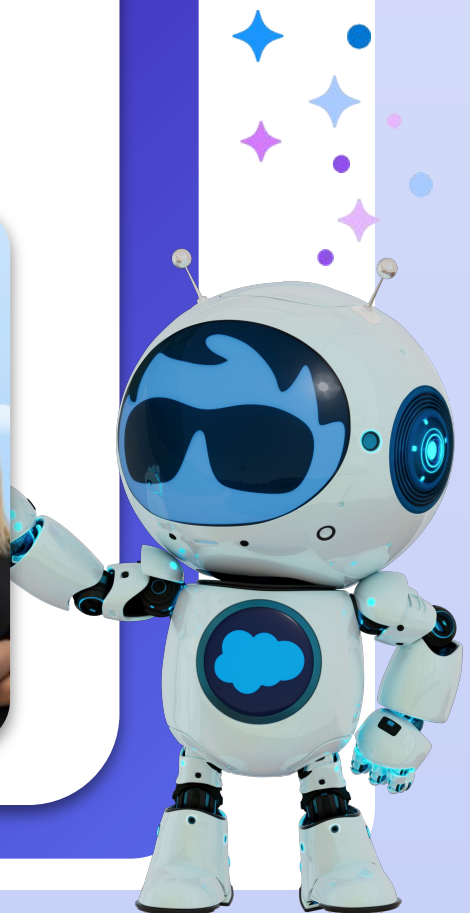
Rebalance human + agent work.

Orchestrate the right partnership between agents and humans to ensure each does what they do best. Know the outcomes with tools, such as [Agentforce Command Center](#).*

Agentforce
Command Center



View the 4R Innovation Playbook



Prepare & Inspire Your People for the Future

Discussion

How can you position AI as an opportunity for business transformation?

What are the key skills your employees need to thrive in an Agentic Enterprise?

What training or development opportunities can you set up to ensure your employees are prepared to work alongside agents?

ACTIVITY! Build your [alignment plan worksheet](#) - Map stakeholders affected by AI, assess impact, readiness, and concerns; identify skill gaps; develop engagement strategies

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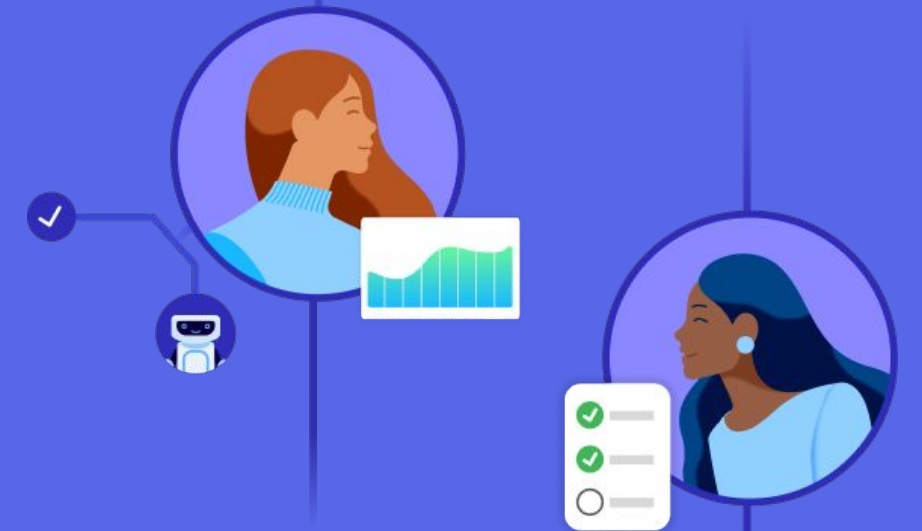
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Begin With The Right Use Case

Prioritize your use cases, quality > quantity

Start small, build momentum

Resist rolling out AI everywhere at once. Identify the personas that could most benefit from agents, and then prioritize high-value use cases based on their potential for a transformative impact and probability of success. Use these as proof points to scale for broader adoption.

Ask the right questions up front

Set your agent up for success by asking:

- What business goal will this agent address?
- What's our organization's risk tolerance?
- What data does the agent need to succeed?
- How will our employees engage with this agent?

Measure what matters

Plan for both leading and lagging indicators for each of your prioritized use cases. Eg: engagement rates, escalation patterns, or feedback score.



Engine, a corporate travel management platform, is an Agentic Enterprise:

- First AI agent built in 12 days for 1 use case; test-learn-scale approach
- Handles cancellations in seconds → 15% faster than before.
- Supports 70% YoY growth without extra headcount

What We Did

Begin With The Right Use Case



We first prioritized four hero agents to address major opportunities and personas, then expanded to use cases across other functions based on potential, feasibility, and ROI

Hero Agents —> Our Broader Agent Landscape

Sales Agent

DEMO

Lead Nurturing Agent

DEMO

Salesforce Help

DEMO

Salesforce.com

DEMO

Salesforce's top agentic use cases

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Services Delivery

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Agent Available in Slack & Web

Categories of ROI

Simplify

Scale

Grow

Discussion

Which repetitive or high-impact tasks could benefit most from an AI agent?

Which use case should you work on *first*? Think through what will deliver measurable results and build momentum.

How will you measure the impact of your agent?

ACTIVITY! Build your [use case selection worksheet](#) - Brainstorm use cases, map opportunities on the matrix, prioritize 3–5 use cases, create a roadmap, define success criteria, resources, timelines.

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Create Business Processes That *Think*



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Create Business Processes That *Think*

Optimize business processes before adding AI

For each prioritized use case

Focus on the outcome

Define the result you want from an optimized process.

Identify pain points and map the future

Document your current workflow, pinpoint the bottlenecks, duplicative tasks, and data silos that hinder productivity, and map out an ideal future state.

Define accountability & handoff rules

Be precise about what agents and humans do, and when control shifts to humans (eg: complexity, stakes, empathy, urgency).

Don't over-engineer upfront

Start simple and let agents learn from real usage. Overbuilt systems frustrate users and block improvement.

Pilot and create ways for agents to improve

Test the streamlined process on a small scale to confirm it's working. Enable learning from both wins and failures, with humans giving feedback.



Precina, a virtual chronic care clinic, is an Agentic Enterprise.

Agentforce pilot delivers outsized results

- Smart AI workflows clear human→AI handoffs
- \$80K/year in est savings per 5k patients
- Patient outcome: A1C drops 3X faster vs previous

What We Did

Create Processes That *Think*

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We optimized business processes before adding AI - ensuring that we agentified streamlined ways of working.



Agents aren't going to fix your bad processes. You have to be in the business of deduplicating and documenting.

Nathalie Scardino

President and Chief People Officer



Our promotion process before

Data spread across 5 systems

Managers tracked promotions in 4 places

Nomination form was long and duplicative

With the Manager Agent

All data consolidated by Agent

One place for manager Q&A

Streamlined nomination form



Case Study: Streamlining promotions before adding agents supercharged our impact

Discussion

For each prioritized use case

Think about your current state process - what feels frustrating? Now, reimagine it. What's the ultimate goal?

What parts of the process are broken? What does an optimal version of this process look like, from both a people and technology perspective?

Where should the agent handle it, and where should humans step in?

ACTIVITY! Build your [Outcome-Focused Workflows](#) worksheet - use this to design intelligent business workflows.

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Ground Agents
in Trusted,
Reliable Data



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Ground Agents in Trusted Data

Build a unified knowledge foundation

Connect fragmented data into one unified platform. Without this, agents may surface facts, but fail to deliver meaningful insights that drive value.

Harmonize and unify profiles

Transform your data into a single, unified profile for each customer.

Ensure data hygiene

Maintain clean, consistent data across every team, and establish clear rules for how data is tagged, accessed, and used. Messy data confuses agents, leading to bad output/conflicting content.

Don't let perfect be the enemy of progress

Agents don't need all your data. Identify what matters most and prioritize that vs. waiting for perfection.

Use decades of past decisions

Deploy agents with trusted, contextual data so they can provide relevant and personalized experiences. Train agents on historical choices and institutional knowledge to ease decision making.



Good360, that locates and redistributes corporate surplus to nonprofits, is an Agentic Enterprise.

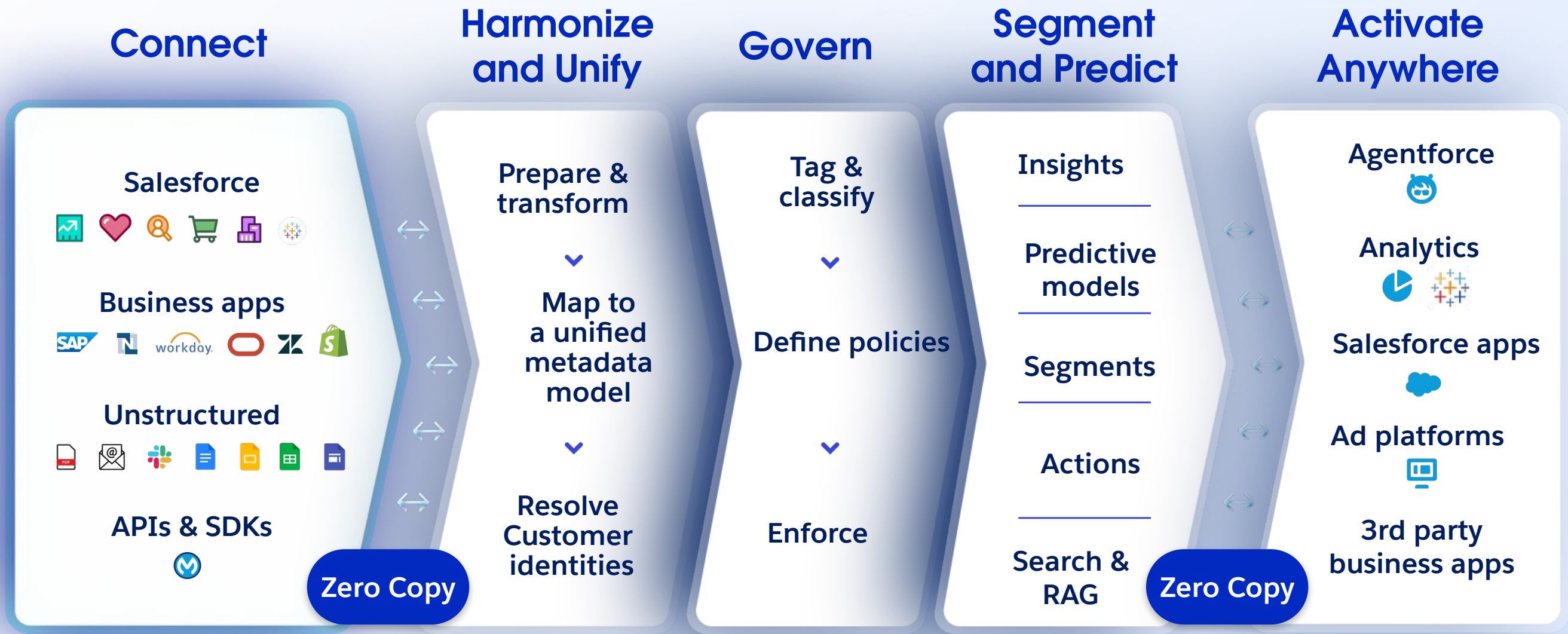
- 3x faster routing of disaster donations
- 1,000+ hours saved annually through automation
- 20% drop in carbon footprint during disaster response.

What We Did

Ground Agents in Trusted Data



We used Data 360 is our data activation layer, connecting all data and activating apps and experiences with Zero Copy, ultimately delivering trusted, contextual data for Agentforce.



Discussion

For each prioritized use case

What are the 3–5 essential data sources the agent needs to be successful (e.g., customer profiles, product info, case history)?

Rate each on Accuracy, Accessibility, Security, Governance (1–3 scale).

Choose one high-impact improvement for each, and assign an owner.

ACTIVITY! Build your [Essential Data Sources](#) worksheet. For each data source your agents will need, score its readiness from 1 (needs significant improvement) to 3 (well established).

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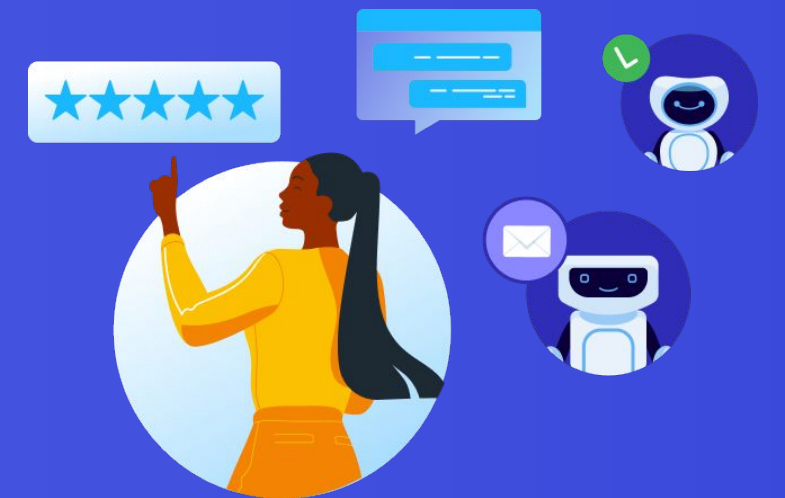
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Elevate Teams with Humans & Agents Together



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Elevate Teams with Humans & Agents Together

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Build agents in the flow of work

Identify where your employees spend the most time, and design agents to live within existing, heavily trafficked platforms.

Technical accuracy alone isn't enough

Agents need emotional intelligence and a service mindset. Train them like human employees with values and empathy.

Provide full context on escalations

When agents escalate cases, provide full summaries and analysis. This context speeds up customer resolution and keeps employees focused.

Measure both sides of the dividend

Track customer metrics (e.g. wait times and resolution rates), and employee metrics (e.g. time on strategic work and job satisfaction) to show how transformation benefits everyone.



1-800Accountant, an online accounting and tax service provider, is an Agentic Enterprise.

- Scaled service support with nuanced AI agents + human experts
- Chatbot solved 10% of inquiries; Agentforce resolves 50%
- 1,000+ client engagements in 24 hours of launch
- CPAs level-up roles to be more strategic

Elevate Teams with Humans & Agents Together

We built and surfaced agents where users spend the most time to augment, not interrupt. We manage them like they're members of the team, training on both the job to be done and designing for the experience.



Slack is the window to the Agentic Enterprise for all employees

20+
Agents Deployed
in Slack



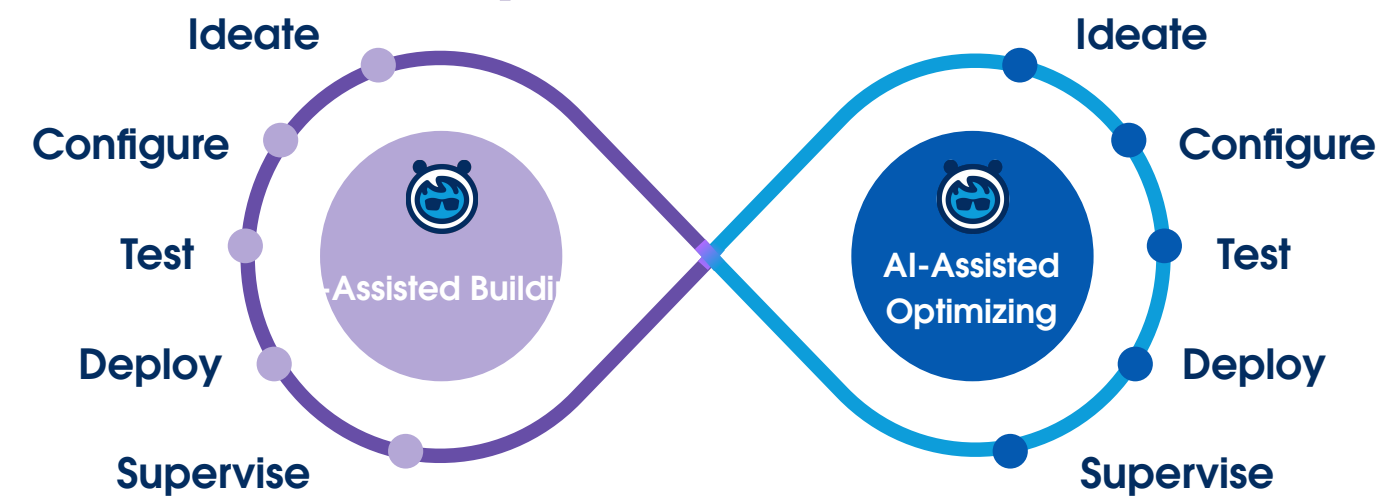
Agents are also built into our CRM, right where our employees work



Our customers interact with Agents where they interact with us most - our website, help.salesforce.com, and in their inboxes

Agents are trained to be smart and serve

Multi-Variant Testing, Tuning & Experimentation



Elevate Teams with Humans & Agents Together

Discussion

For each prioritized use case

Examine the core business processes for your prioritized use case. Discuss what systems are currently used for each, and how agents can be built in those existing systems?

List which steps could be agent-led vs. human-led.

Discuss: What non-technical qualities do we want our agents to display? How should we design them to act and behave?

ACTIVITY! Build your [Team Orchestration](#) worksheet - help your teams collaborate with AI Agents.

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6 Augment Human Potential & Customer Loyalty

7

Test, Tune and Iterate



8 Measure Value and Impact

Test, Tune, and Iterate to Drive Quality

Implement a refinement cycle

Constantly Ideate, Configure, Test, Deploy, Supervise – to improve and evolve your agents over time.

Monitor agent performance

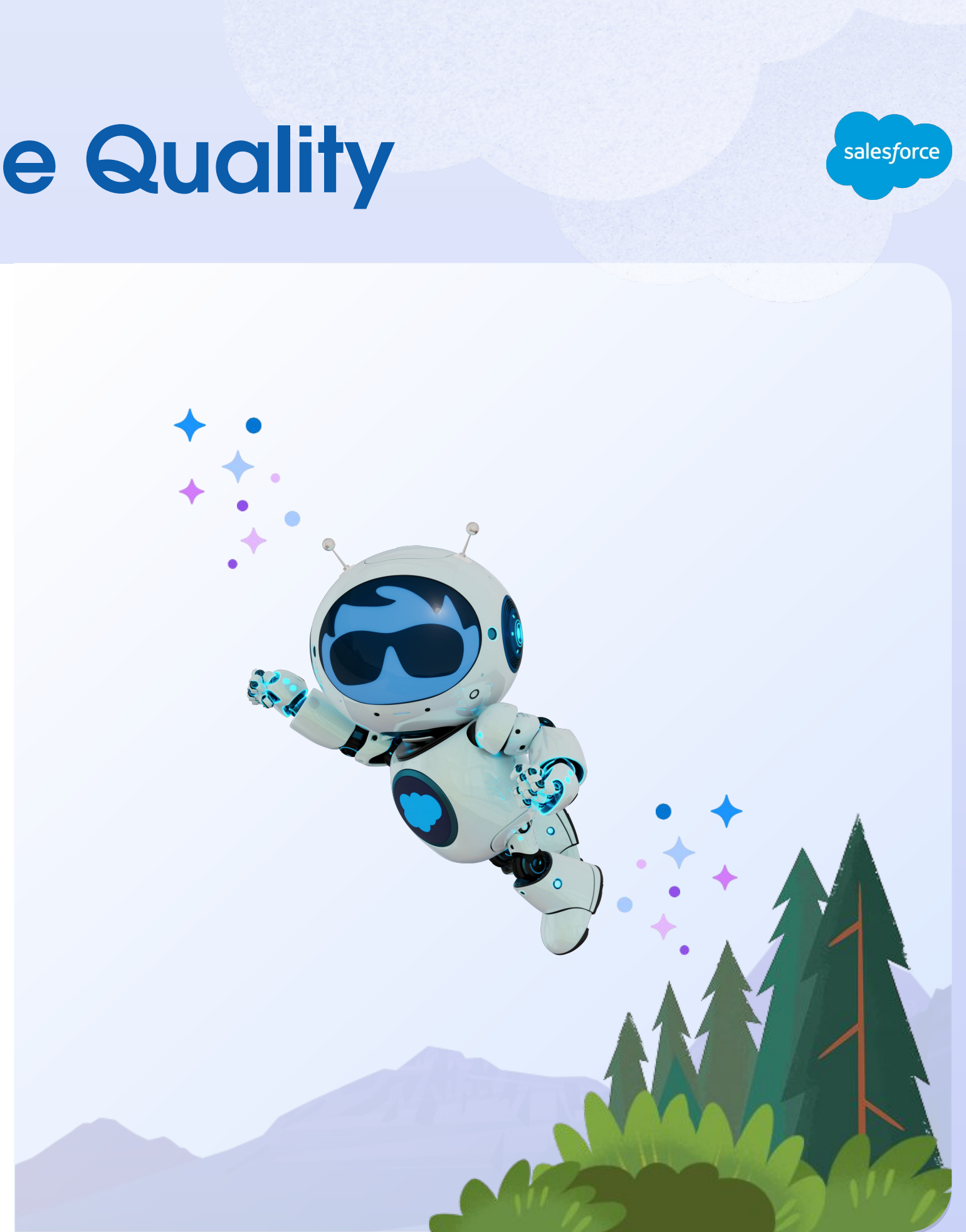
Supervise agent performance in real-time, focusing on key metrics like prompt rates and latency.

Enhance with structured data

Improve accuracy by providing richer, more structured content.

Capture and scale lessons learned

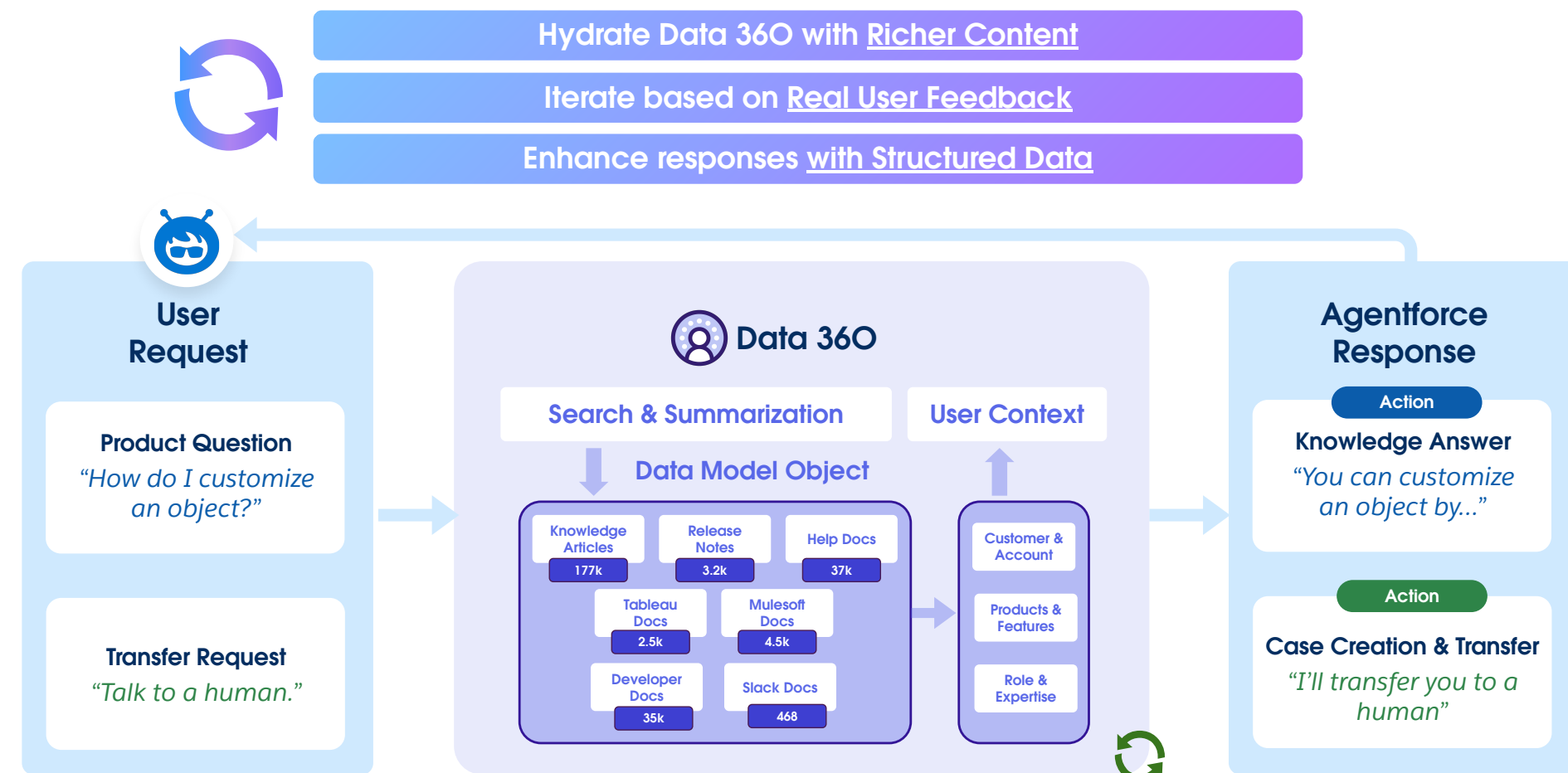
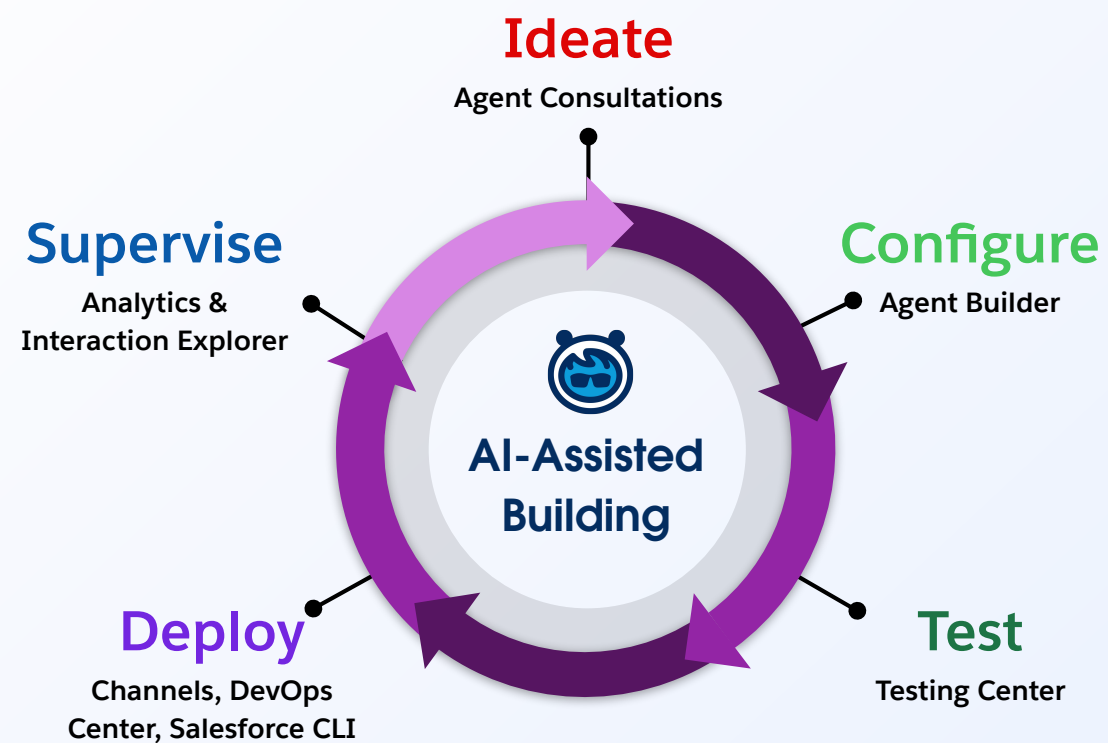
Identify innovations that improved the quality of agents, and share with agent builders across the company to scale lessons learned.



Test, Tune, and Iterate to Drive Quality

We brought our business, IT, and product teams together to continuously innovate our product.

Our agent refinement cycle



Test, Tune, and Iterate to Drive Quality

Discussion

Who should be involved in testing, tuning, and iterating the agent over time? What is the cadence for engagement?

How are you gathering user feedback? What forums do you have set up to discuss and implement potential changes?

What additional, richer content and structured data can you use to hydrate the agent and improve its accuracy and performance?

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Measure Value and Impact



Measure Value & Impact

Define quality and establish a rubric

Create a clear, data-driven rubric that articulates agent quality, going beyond simple usage to also measure adoption, retention, and the overall impact (ROI) of your agents.

Activate dashboards

Implement centralized dashboards that provide a clear view of agent performance and activity - learn more about what's available to our customers [here](#).

Use insights for decisive action

Analyze the dashboard to generate realistic goals and drive continuous improvement for each agent.



What We Did

Measure Value and Impact

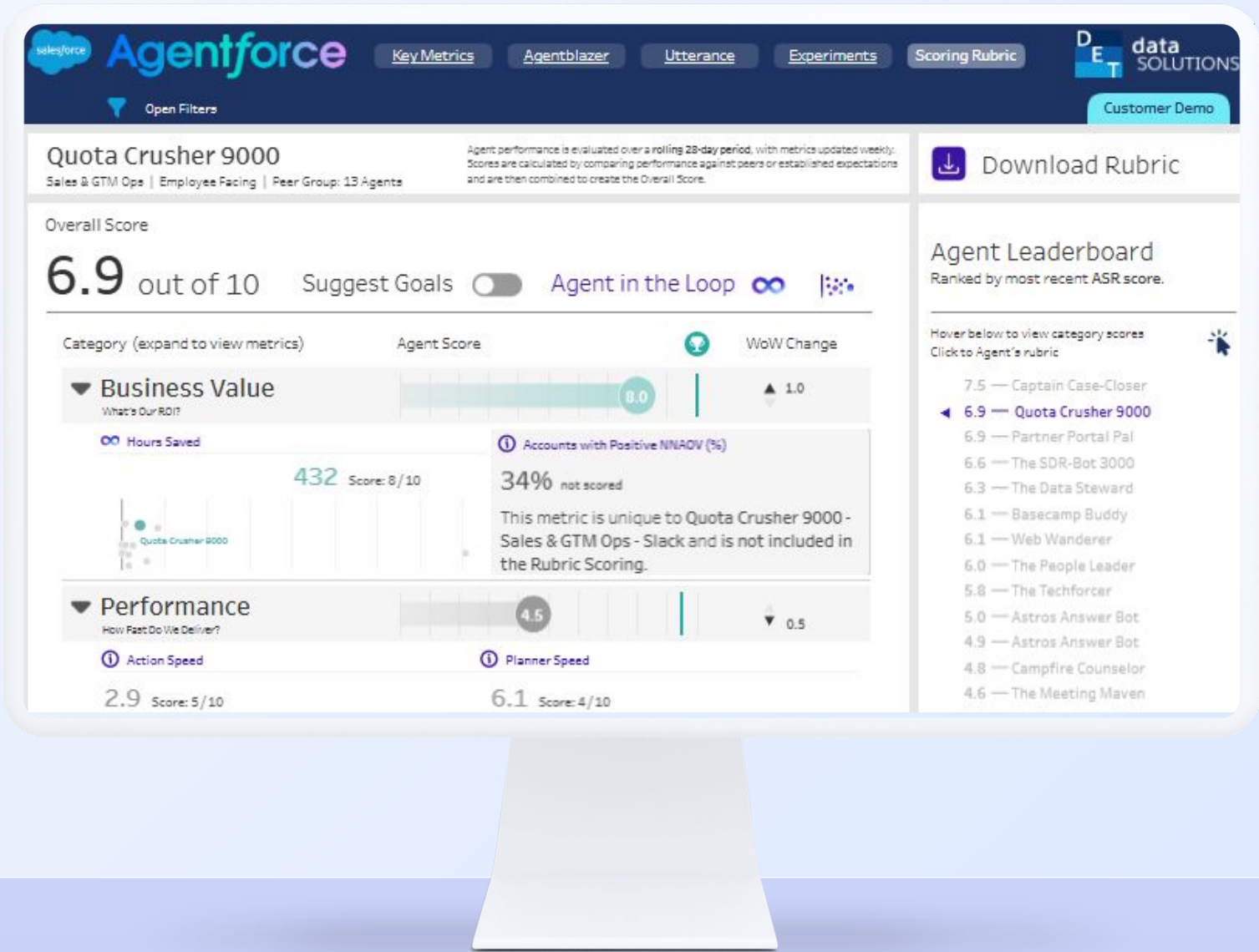


We built an Agentforce Dashboard to measure value and impact, ranking agents to identify top performers and pinpoint areas of improvement - which has directly informed our product.

What we track

- ROI
- Speed and Performance
- Relevancy of Responses
- User Satisfaction
- Adoption and Retention

How we track



Discussion

What metrics can be used to define the quality of an agent, e.g., usage, efficacy, performance, business value, and satisfaction

How are you gathering and visualizing this data to drive transparency and decision-making?

What forums can you set up to promote and discuss the quality of your agents to celebrate successes and drive decisions about your Agent portfolio?

What's Next & Resources

What's Next? Agent Ecosystems & EGI

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Prepare for agent ecosystems

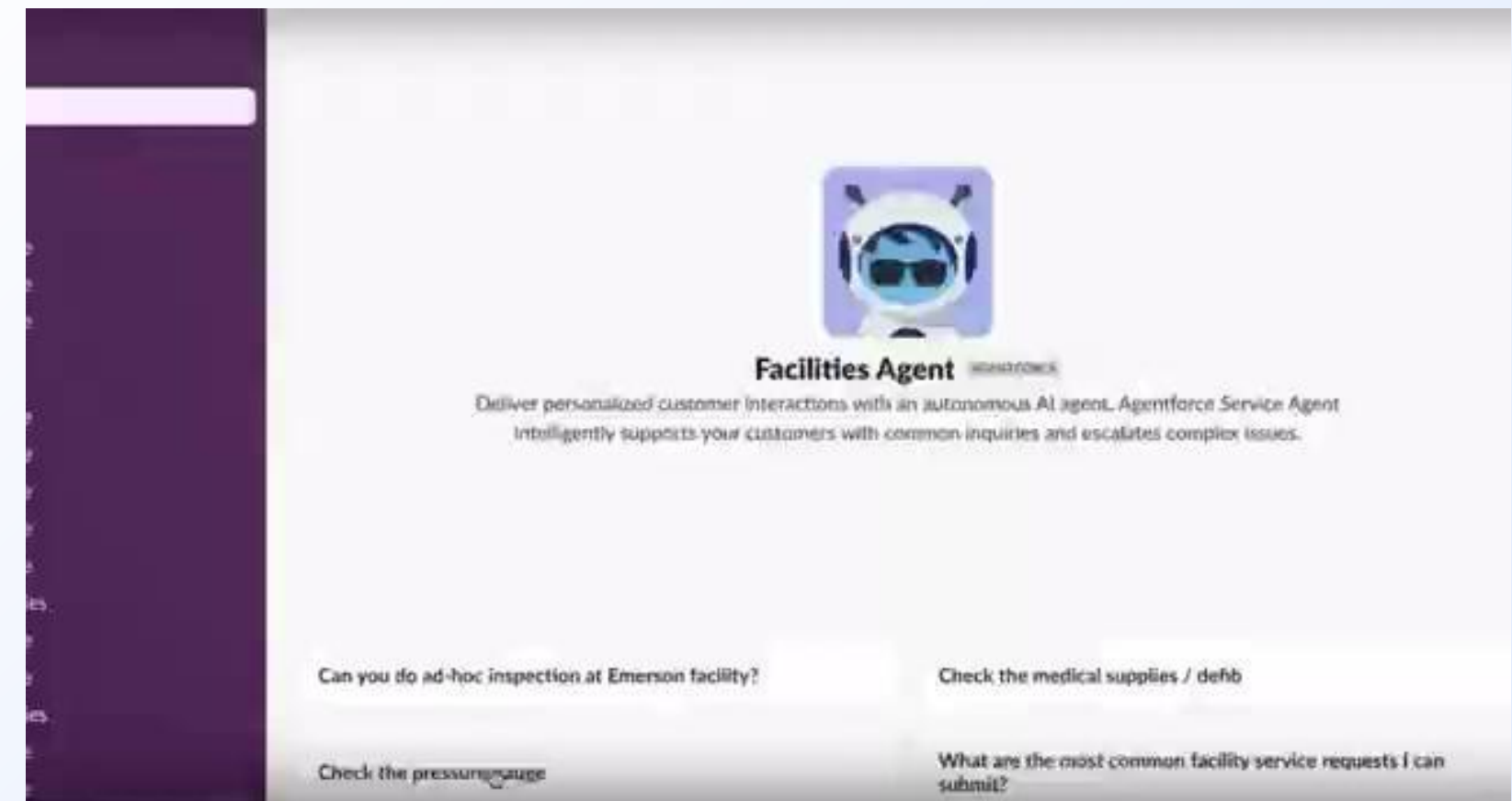
Agents will increasingly work with other agents. Explore where multi-agent workflows amplifies value in your org and get your infrastructure, data, and governance ready!

Focus on human-AI collaboration

Invest in seamless handoffs - this will be a key differentiator between merely deploying AI vs. truly transforming.

Cultivate future-ready skills

Develop the human capabilities needed to work effectively with increasingly sophisticated AI systems.



Watch Demo [Here](#): Agentforce With Physical Robotic Agents.

What's Next? Agent Ecosystems & EGI



Activity: EGI Readiness Assessment

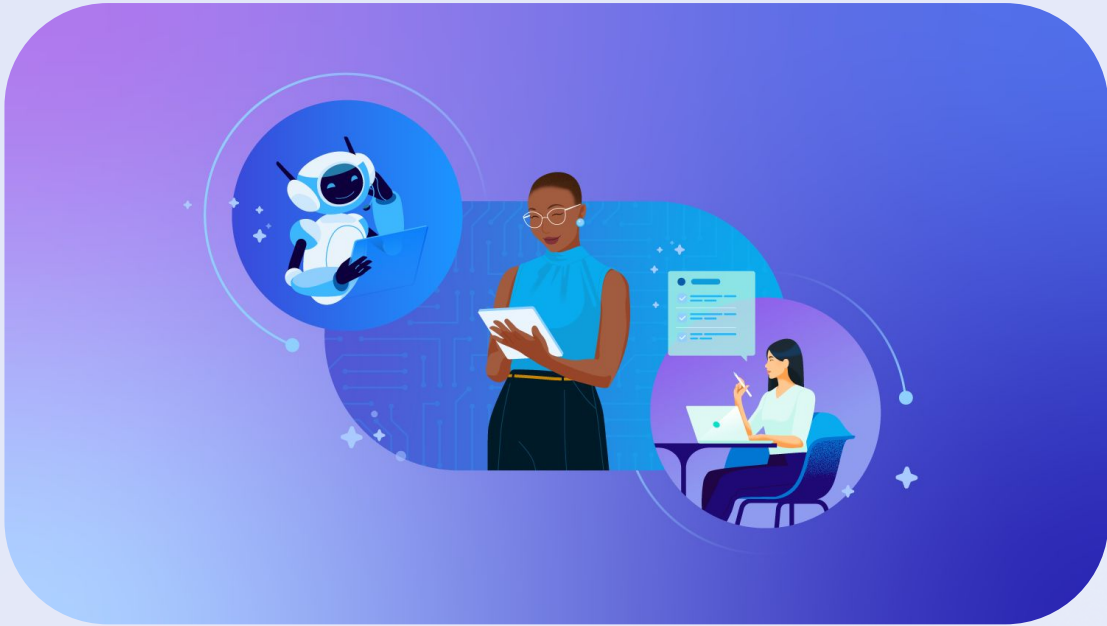
Ask: Where do we see multi-agent ecosystems, robotics, or advanced intelligence impacting our industry?

Rate readiness on a simple scale: Exploring
→ Piloting → Scaling
→ Not Yet Relevant.

Discuss: What's one experiment we could try in the next 12 months?

ACTIVITY! Build your [EGI Assessment](#) worksheet - help your teams prepare for the future of AI, enterprise general intelligence.

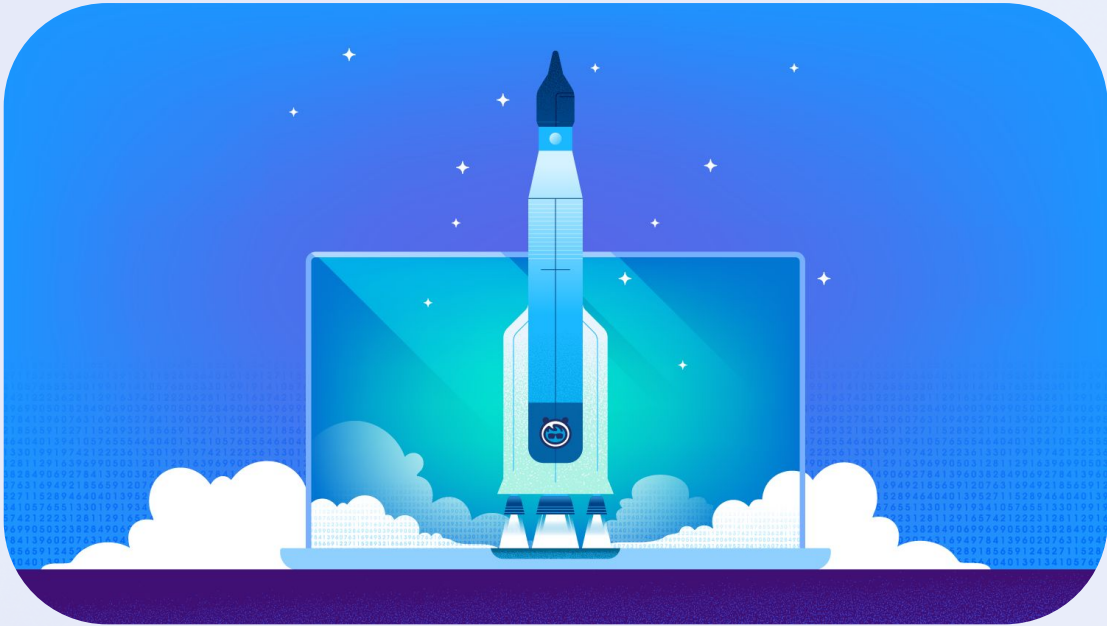
More Resources



Become an Agentic Enterprise Guide

Transform AI potential into business reality. Check out the full version of this step-by-step guide

[Visit here](#)



Agentic AI Resource Library

Resources to help you spot high-impact use cases, run a successful pilot, manage a blended workforce of humans and AI agents.

[Visit here](#)



Thank you