



Agentforce World Tour Korea



Forward looking statement

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 materialise 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.



Agentforce 핵심 엔진!! "Data Cloud" 살펴보기

정정호 (Sr. Data Cloud Specialist AE)





THANK
YOU
🇰🇷



Agenda

salesforce

Intro

Salesforce Data Cloud에 대해 간략히 소개합니다.

데이터 연결 / 운영 (모델링)

데이터 수집, 변환, 통합 프로파일 구성 및 데이터 활성화까지의 Data Cloud의 여정을 알려 드립니다.

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데이터 관리

데이터 접근 제어, 프라이버시, 감사 추적 등 Data Cloud의 거버넌스 기능에 대해 알아 봅니다



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AI 도입의 어려움은 모델이 아닌 「데이터 · 기술 기반 · 변화 관리」

기업의 90%가 이 벽에 직면

salesforce

노동 배분

10%



AI 모델 & 알고리즘

AI 모델

<https://www.salesforceairesearch.com/crm-benchmark>

노동 배분

90%



데이터 및 기술 기반

AI를 지원하는 아키텍처
조화롭고 연결 가능한 데이터

업계 특화 Solutions 및
고객인게이지먼트 전략



비즈니스와 인재의 변화

AI & 기술 인력 관리

비즈니스 프로세스 재설계

조직 변혁

책임있는 AI 거버넌스

AI 프로젝트를 위한 우리의 데이터와 조직의 준비사항은?



AI 활용을 위한 비즈니스 사례는?
(내부 직원의 활용, 고객서비스의 활용, 마케팅 자동화 활용 등)

비즈니스 목적에 활용할 우리 조직의 데이터 현황 파악 여부

정형 / 비정형 데이터를 포함한 확장가능한 데이터 아키텍처 설계

데이터 모델링의 설계와 적용

엔터프라이즈 데이터에 맞는 데이터 거버넌스 체계 / 조직의 운영
(데이터 구분, 접근에 대한 관리, 로그에 대한 관리, 전체적인 거버넌스 운영 등)

Data Cloud의 사용목적은 무엇인가요?



심층적인 플랫폼 통합으로
고객 360 완성

Agentforce를 위한
신뢰할 수 있는 컨텍스트 데이터

인사이트에 기반의
비즈니스 액션 실행

고객 360 과 Agentforce를 위한 신뢰할 수 있는 플랫폼 (데이터 거버넌스)



Data Cloud 작동방식을 알아보면



Data Cloud 작동방식을 알아보면



연결

데이터
영역
(모델링)

활용

관리

- 비정형 데이터
- 제로카피
- 3
- API 및 SDK
- OOB 커넥터



데이터 모델 설계의 프레임워크

비즈니스 유스 케이스를 기점으로 한 설계 접근법

salesforce

Example

비즈니스 목표

Why

- 해결해야 할 비즈니스 과제와 이상적인 목표 상태를 설정
- 성공을 측정하기 위한 KPI와 진행 지표를 정한다.

Salesforce의 실현 수단

What

- Salesforce를 사용하여 어떤 구성으로 실현할 수 있는지 전체 구성도 설계
- 실질적인 고객사의 데이터 현황을 바탕으로 한 데이터 사이클 설계
- 설계 -> 구축 -> 활용 -> 유지보수 + 단계별 접근법 가정

성과의 구체화

How

- Solutions 도입으로 기대되는 성과를 구체화
- KPI 개선, 비용 절감, 업무 효율화 등의 효과를 정량·정성으로 평가
- 아무것도하지 않은 경우의 위험 (기회 손실 등)도 함께 정리

비즈니스 목표

여러 소스 및 플랫폼에서 고객 데이터 통합 / 비즈니스 활용

기능 및 요소

- 데이터 연결의 구성 및 관리
- 목적에 따라 구성한 데이터 모델링
- 통합 고객 이미지
- 내부 기준 스코어링 및 인사이트
- 세그멘테이션 및 활성화를 한 곳에서 실행
- 각 영역에서의 정형 / 비정형 데이터 기반 활용

성과 지표/가치를 낚는 요소

- ▲ 생산성과 업무 효율 향상 (XX%)
- ▲ 전환율 향상 (XX%)
- ▲ 고객 1인당 매출 향상 (XX%)
- ▲ 고객 유지율 향상 (XX%)

유스 케이스 예

모든 채널에서 네이티브 활성화를 가능하게 하는 통합 고객 프로필을 활용하여 신속하게 세그먼트화하고 통찰력을 얻습니다.
그 결과 매출 성장, 업무 효율성 향상, 컴플라이언스 강화로 이어진다.



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- API 및 SDK
- 제로카피
- 비정형 데이터

연결

운영
(모델링)

활용

관리



Data Cloud의 내장된 270+ 이상의 커넥터 사용



애플리케이션

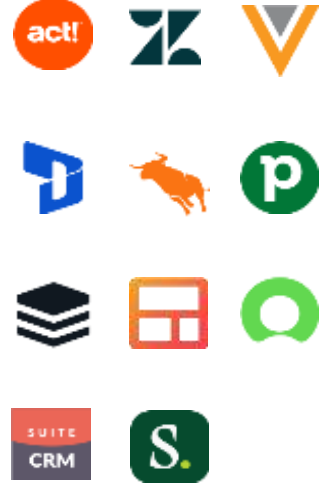
분석



광고



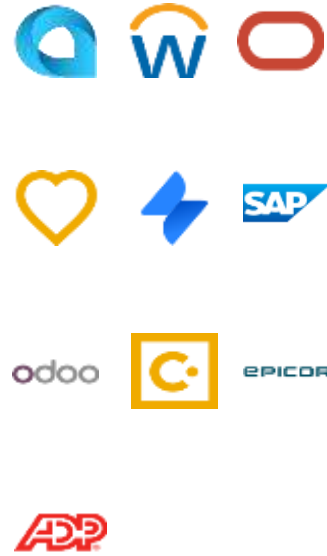
고객관리



이커머스



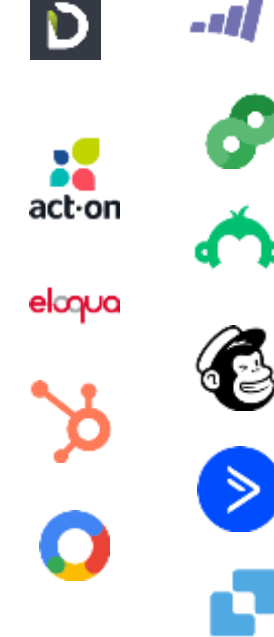
전사자원관리



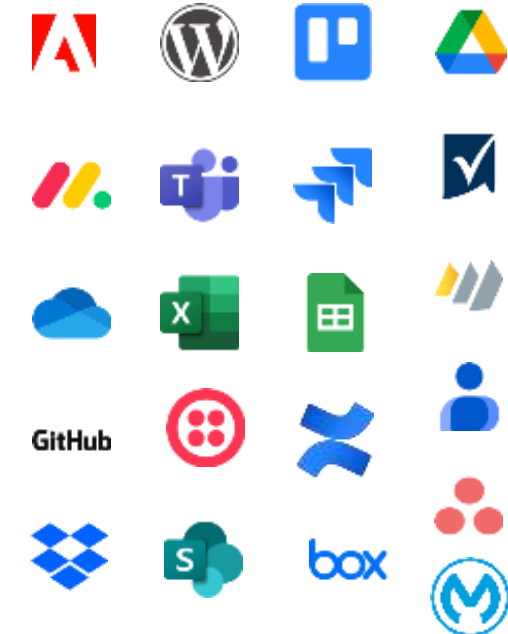
재무



마케팅



생산성앱



소셜



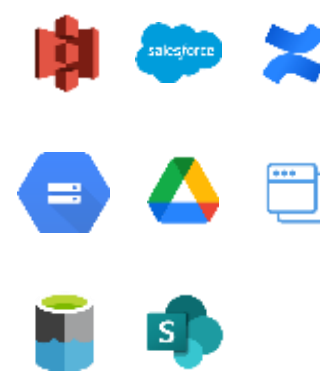
데이터베이스



스트리밍



비정형



데이터레이크 & 데이터웨어하우스

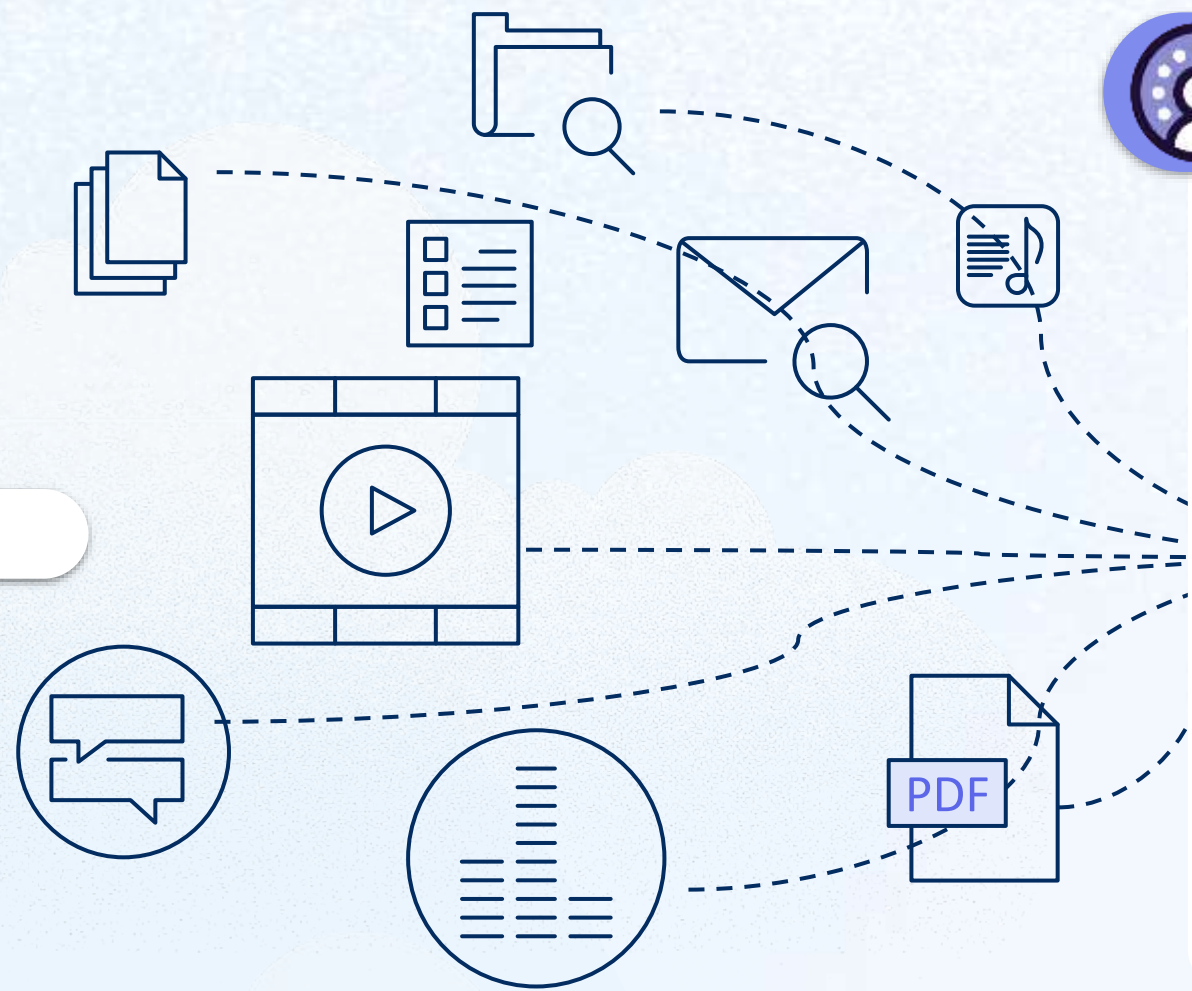


제로카피

다양한 비정형 / 반정형 데이터의 수집



고객



Data Cloud

세일즈포스 Knowledge 연결
/ 파일 커넥터
/ 스토리지 커넥터
동영상, 음성파일 등

고객 360 활용

Agentforce 활용

보다 똑똑한 의사결정 지원

비즈니스 프로세스의 효율

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Data Cloud 작동방식을 알아보면



- OOB 커넥터
- API 및 SDK
- 제로카피
- 비정형 데이터

연결

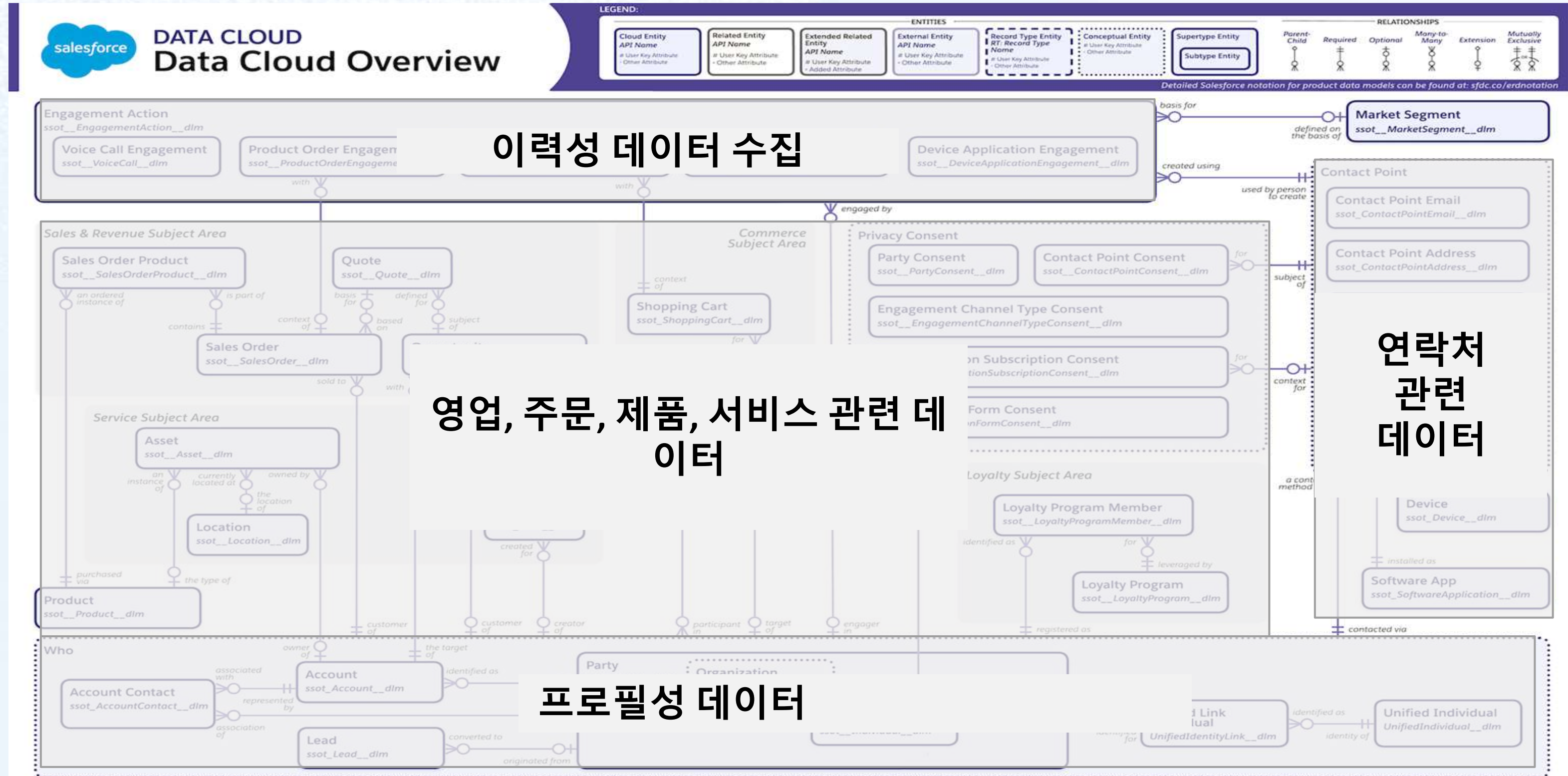
운영
(모델링)

활용

관리



Data Cloud 모델링



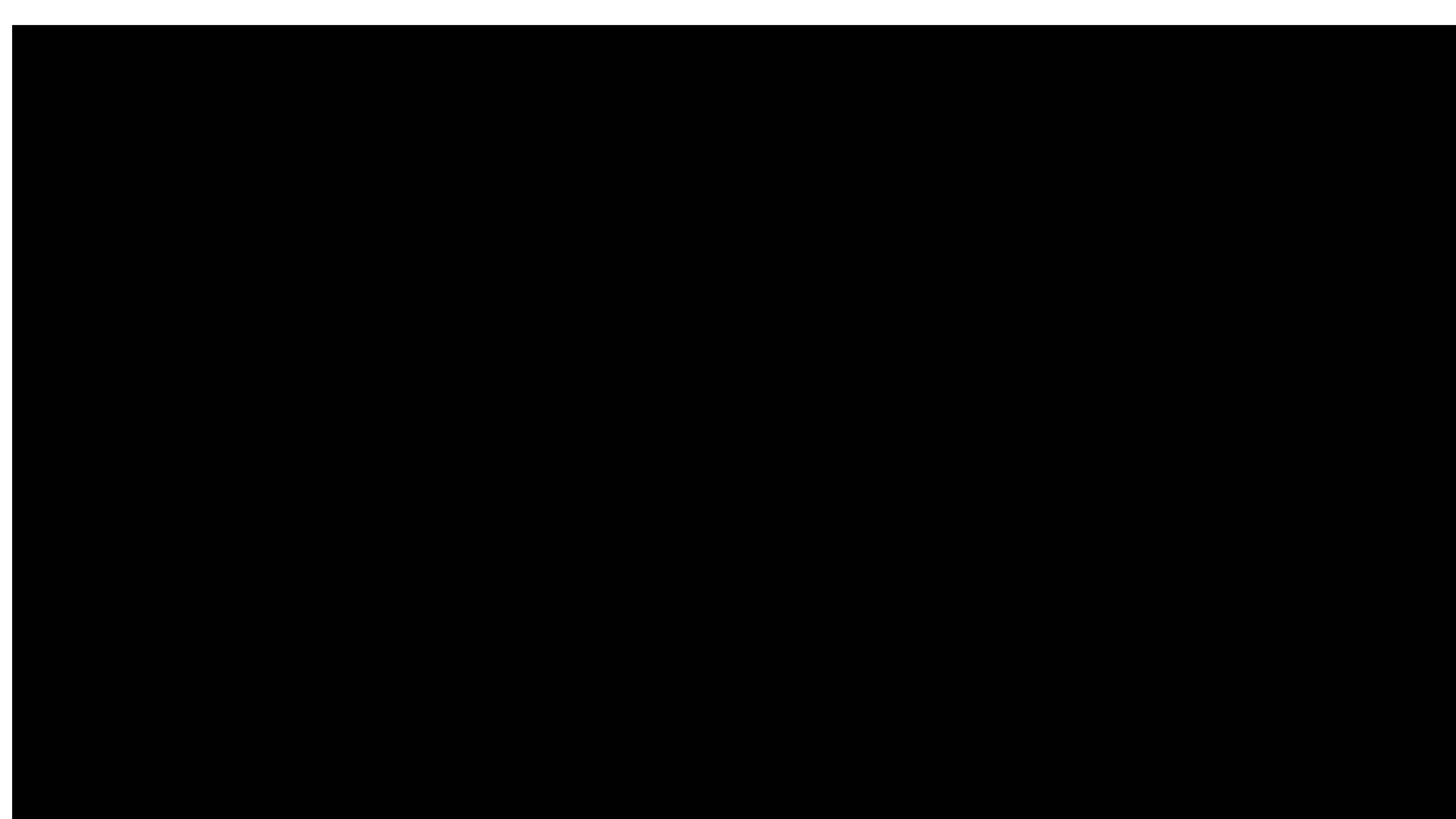
데이터 모델 매핑



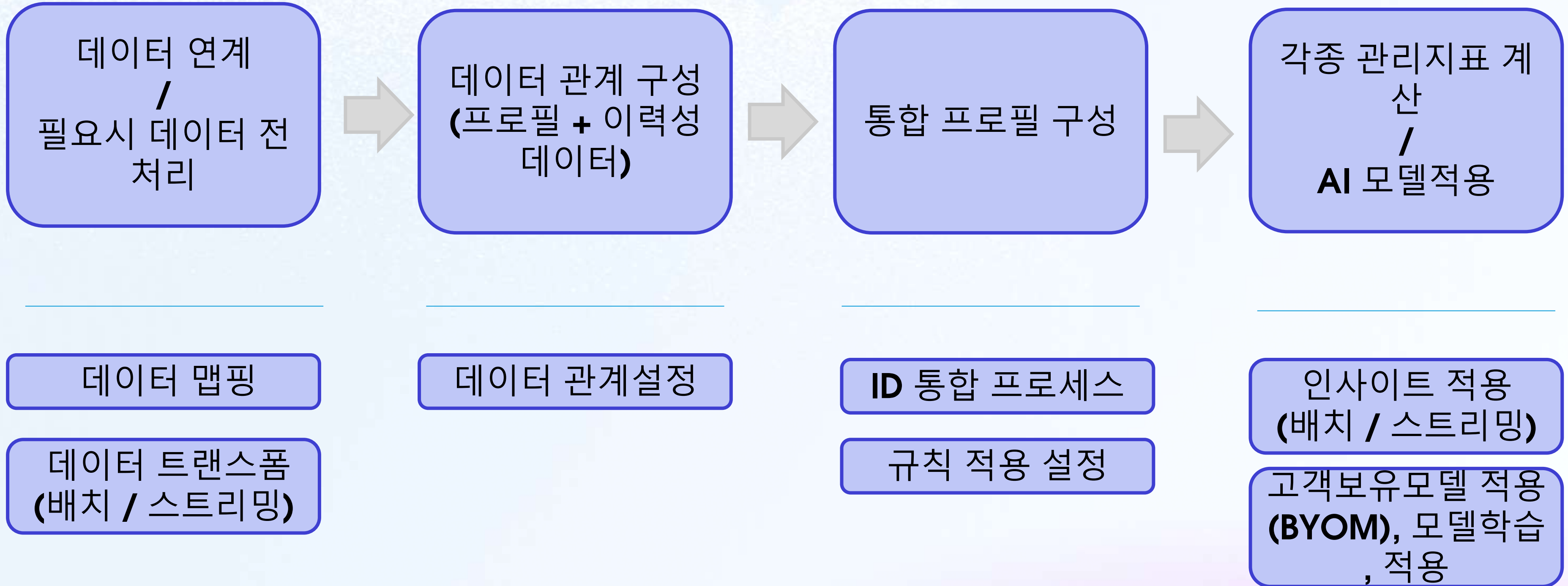
The screenshot shows the Salesforce Data Lake Objects interface. The top navigation bar includes Home, Data Streams, Data Lake Objects, Data Model, Data Transforms, Calculated Insights, Data Explorer, Segments, and More. The main content area is titled "Data Lake Objects DemoData" and features a search bar for "Search Data Lake Objects...". Below this, there are two panels: "Demo Data" on the left and "Data Model Objects" on the right. The "Demo Data" panel shows a list of fields for "DemoData", including "first_name", "sur_name", "subscriber key" (Primary Key), "city_name", "country", "Active From Date", "Active To Date", "Contact Point Email Id", "IsPrimary", and "Account Type". The "Data Model Objects" panel shows a list of fields for "Individual", including "First Name", "Last Name", "Individual ID" (Primary Key), "City Name", "Country", and "Unmapped (85)". Lines connect the fields in the "Demo Data" panel to the corresponding fields in the "Data Model Objects" panel, indicating a mapping. A central diagram shows five blue arrows pointing from the "Demo Data" panel to the "Data Model Objects" panel, representing the mapping process.

연계하려는 데이터 원본
Data Lake Object

활용하려는 Customer 360 모델
Data Model Object




Data Cloud 정형 데이터 관리 사이클



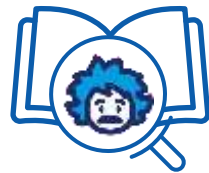
Data Cloud를 활용한 검색 확장 생성(RAG)



사용자 질문

 이 고객은 업그레이드 권한이 있는 고객입니까?

검색



검색하고 관련성이 높음
정보 얻기

요청

결과

프롬프트

LLMs



적절한 답변



이전 이메일을 기반으로 이 고객은 업그레이드할 권리가 있습니다.



Data Cloud Vector Database

구조화된 데이터



Salesforce의 케이스



CSV의 재무 데이터

비정형 데이터



지식 기사 PDF



기회의 녹음 데이터

Semantic Layer 적용

비즈니스 지식을 활용하여 데이터를 강화하고, 의미있는 통찰



애플리케이션 계층

BI 도구 및 에이전트 분석



엔터프라이즈 리포트



고객 360 애플리케이션



Data Cloud

Semantic Layer

복잡한 데이터를 친숙한 비즈니스 용어로 변환

Data Layer

데이터를 단일 신뢰할 수 있는 소스로 가져 와 통합 및 조화

우리 조직의
데이터를 우
리가 정의한
자연어 그대
로 활용해보
자!!



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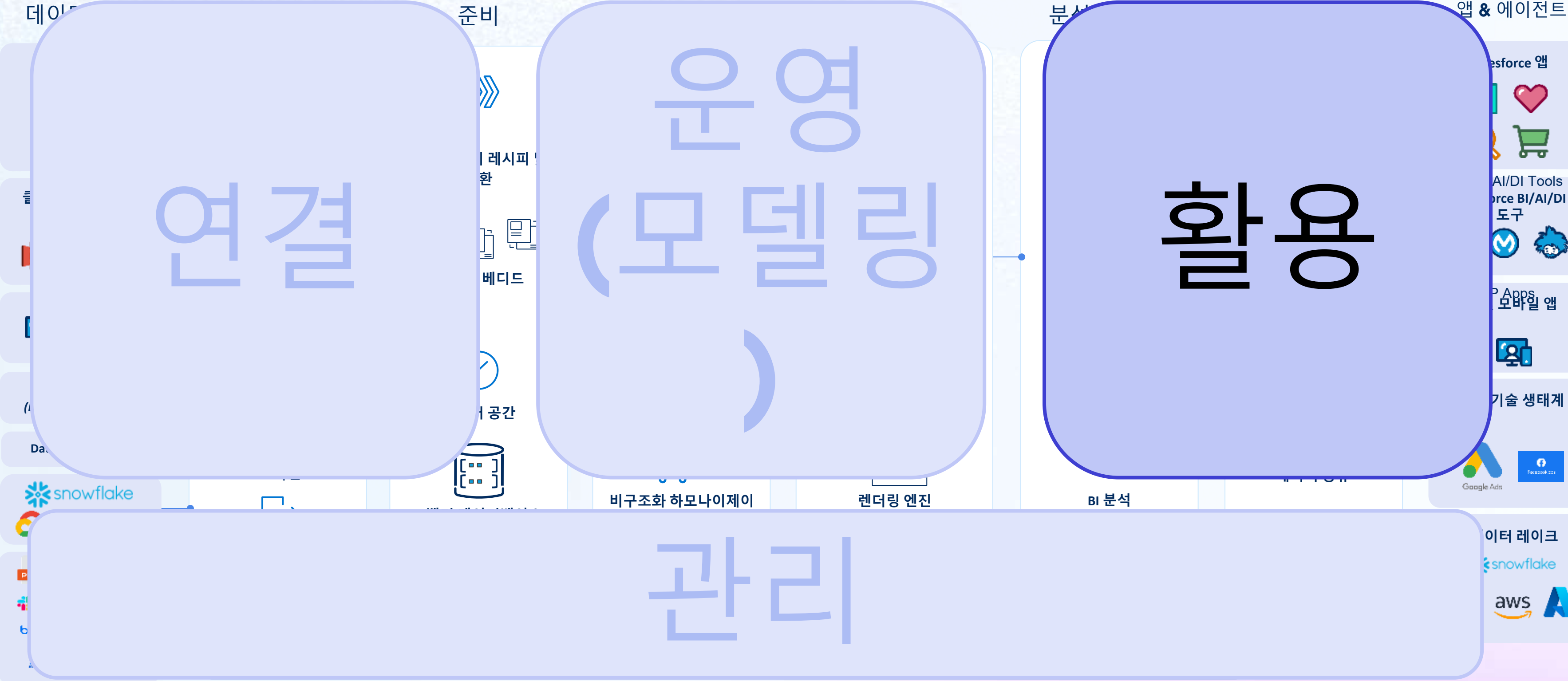
- OOB 커넥터
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연결

운영
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활용

관리



Data Cloud의 비즈니스 활용방식



고객 360



마케팅 실행

활용



에이전트포스



데이터 분석
Tableau Next

고객 360 뷰 예시

San Francisco, CA

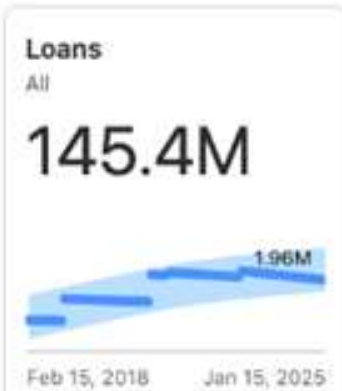
Customer ID
Email Address: jmorris@example.com
Phone Number: 8635841901
Address: 1 Market St, San Francisco, CA 94105

LTV
Active Segments: 3
VIP, West Coast, Urban

Profile Data:

Deposits	Loans		Investments			
	\$ Amount	\$ Balance	\$ Interest	\$ Amount	\$ Balance	% Avg ROI
\$77.4k	\$1.0M	\$771.6k	\$247.6k	\$53.0k	\$72.1k	5.56%

Details Journey Sales + Service **Financial Accounts** Financial Transactions More



Unified Relationships (3)

Acco untID	Sourc eOrg	Name	Email
001a100001 ATjgJAAT	Salesforce_F InsDC4	Julie Morris	
001a100000 EkcyjAAB	Salesforce_F InsDC1	Julie Morris	
001am00000 0qvjsAAAQ	Salesforce_ Home	Julie Morris	jmorris@example.com

Calculated Insights

CSAT: 90.00
Preferred Channel: Digital

Net Promoter Score: Promoter
Lifetime Value



Financial Account Deposits (5)

5 items - Filtered by Open Date - Updated 17 minutes ago

Financial Acc...	Name	Description	Financial Account ...	Financial ...	Current I
SV-4552124	Cumulus Savings	My Savings	Savings	Active	5,169.33k
MM-1234567	Cumulus Money Market	Emergency Fund	Money Market	Active	10,512.06k
IC-123456	Cumulus Interest Checking	Interest Checking	Checking	Active	27,605.7k
CD-4458775	Cumulus 12Mo CD	Cumulus 12Mo CD	Certificate of Deposit	Active	20,807.9k
CC-123456789	Cumulus Checking	Everyday Checking	Checking	Active	13,477.35k

[View All](#)

Financial Accounts - Loans & Lines (5)

5 items - Updated 17 minutes ago

Loan Account Id	Loan Type	Description	Loan Amount	Loan Balance
PL-42235	Loan	Cumulus Personal Loan	15,000.0000	10,090.780000
ML-455216	Mortgage	Cumulus 30 Yr Mortgage	850,000.0000	737,235.930000
LN-987654	Line of Credit	Revolving	15,000.0000	0.000000
HE-744606	HELOC	Revolving	70,000.0000	0.000000

Recommendations More



- ### Top Predictors
- ▲ 2.8% Days Since Last Interaction:35
 - ▲ 1.7% Customer Segment:Regular
 - ▲ 1.5% Mobile Banking Customer:No

- ### Suggested Improvements
- ▼ -5.9% Cross Sell Score:3 to 4
 - ▼ -4.1% Cross Sell Score:2 to 3
 - ▼ -3.3% Mobile Banking Customer:Yes

Prediction Summary

Top Predictors

In the analysis of customer attrition, the top predictors were identified as follows. The number of days since the last interaction has a significant impact, contributing a 2.797% increase to the overall attrition probability when the value is 35 days. Being categorized as a regular customer segment contributes a 1.698% increase in attrition probability. Additionally, customers who are not using mobile banking services contribute a 1.485% increase in the likelihood of attrition.

Recommendations

To mitigate the risk of customer attrition, the model suggests several actionable recommendations. Increasing the cross-sell score from 3 to 4 could reduce attrition risk by 5.867%. Similarly, increasing the cross-sell score from 2 to 3 could result in a 4.124% reduction in attrition risk. Encouraging customers to use mobile banking services could further reduce the attrition risk by 3.293%.

Recommendations [Add All](#)

- Reach out to Julie about 6 month CD promo
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Never Offered

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Dear Unknown Customer,

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Best regards,
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[Copy Draft](#)

- ### Recommendations
- Send the email.
 - Revise the email to include details about the application process.
 - Revise the email to include the current interest rates.

Describe your task or ask a question...



Julie Morris

San Francisco, CA

Customer ID
Email Address: jmorris@example.com
Phone Number: 8635841901
Address: 1 Market St, San Francisco, CA 94105

LTV

Active Segments: 3

VIP West Coast Urban

Profile Data: [Icons]

Unified Relationships (3)

Account ID	Source Org	Name	Email
001a100001ATjgJAAT	Salesforce_FinsDC4	Julie Morris	
001a100000EkcyjAAB	Salesforce_FinsDC1	Julie Morris	
001am00000qcvjsAAAQ	Salesforce_Home	Julie Morris	jmorris@example.com

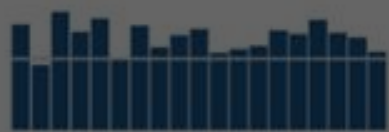
Calculated Insights

CSAT: 90.00
Net Promoter Score: Promoter
Preferred Channel: Digital
Lifetime Value

Financial Wellness Score: **Medium**

2.9

▲ 3.6%



Financial Planning: **Intermediate**



Person Account
Mrs. Julie Morris

Open Relationship Center *Schedule Appointment Edit

Deposits	Loans		Investments			
\$ Amount	\$ Balance	\$ Interest	\$ Amount	\$ Balance	% Avg ROI	
\$77.4k	\$1.0M	\$771.6k	\$247.6k	\$53.0k	\$72.1k	5.56%

통합 고객 프로파일 정보

1.2M

77.37K

Jun 1, 2023 - Jan 1, 2025

Top contributors by account_type are: Checking with 743.1K Deposits...

145.4M

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Feb 15, 2018 - Jan 15, 2025

Just 2 members in Loan_Category make up the majority (72.0%) of...

58.5K

+58.5K vs. prior period

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Financial Account Deposits (5)

Financial Account ID	Name	Description	Financial Account Type	Financial Status	Current Balance
SV-4552124	Cumulus Savings	My Savings	Savings	Active	5,169.33
MM-1234567	Cumulus Money Market	Emergency Fund	Money Market	Active	10,512.06
IC-123456	Cumulus Interest Checking	Interest Checking	Checking	Active	27,605.71
CD-4458775	Cumulus 12Mo CD	Cumulus 12Mo CD	Certificate of Deposit	Active	20,807.91
CC-123456789	Cumulus Checking	Everyday Checking	Checking	Active	13,477.35

Financial Accounts - Loans & Lines (5)

Loan Account ID	Loan Type	Description	Loan Amount	Loan Balance
PL-42235	Loan	Cumulus Personal Loan	15,000.0000	10,090.780000
ML-455218	Mortgage	Cumulus 30 Yr Mortgage	850,000.0000	737,235.930000
LN-987654	Line of Credit	Revolving	15,000.0000	0.000000
HL-744406	Home Loan	Revolving	70,000.0000	0.000000

Recommendations

Attrition Likelihood

52%

52%

Top Predictors

- ▲ 2.8% Days Since Last Interaction:35
- ▲ 1.7% Customer Segment:Regular
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Suggested Improvements

- ▼ -5.9% Cross Sell Score:3 to 4
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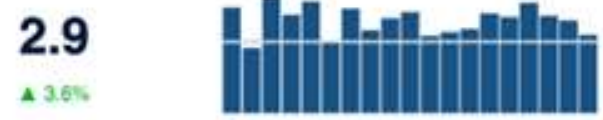
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001a100000 EkcyjAAB	Salesforce_F InsDC1	Julie Morris	
001am00000 0qvjsAAAQ	Salesforce_ Home	Julie Morris	jmorris@ex- ample.com

Calculated Insights

CSAT: 90.00
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Deposits	Loans		Investments			
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Details Journey Sales + Service **Financial Accounts** Financial Transactions More

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Financial Accounts - Loans & Lines (5)

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LN-987654	Line of Credit	Revolving	15,000.0000	0.000000
WF-744606	HELOC	Revolving	70,000.0000	0.000000

CI(Calculated Insights)

Recommendations More

Attrition Likelihood

내장된 분석

1.5% Mobile Banking Customer:No

Suggested Improvements

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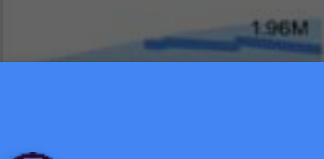


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Enriched Related Lists

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5 items - Filtered by Open Date - Updated 17 minutes ago

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CD-4458775	Cumulus 12Mo CD	Cumulus 12Mo CD	Certificate of Deposit	Active	20,807.9k
CC-123456789	Cumulus Checking	Everyday Checking	Checking	Active	13,477.3k

[View All](#)

Financial Accounts - Loans & Lines (5)

5 items - Updated 17 minutes ago

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Recommendations More

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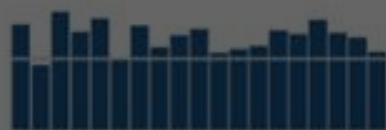
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Person Account

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Edit

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예측 AI

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Financial Accounts - Loans & Lines (5)

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추천

액션/자동화

Recommendations

More



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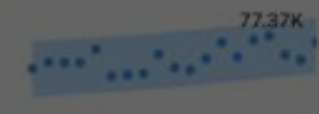
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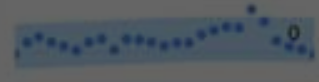
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- ▼ -5.9% Cross Sell Score:3 to 4
- ▼ -4.1% Cross Sell Score:2 to 3
- ▼ -3.3% Mobile Banking Customer:Yes

Prediction Summary

비정형 데이터 RAG

increase in attrition probability. Additionally, customers who are not using mobile banking services contribute a 1.485% increase in the likelihood of attrition.

Recommendations

To mitigate the risk of customer attrition, the model suggests several actionable recommendations. Increasing the cross-sell score from 3 to 4 could reduce attrition risk by 5.867%. Similarly, increasing the cross-sell score from 2 to 3 could result in a 4.124% reduction in attrition risk. Encouraging customers to use mobile banking services could further reduce the attrition risk by 3.293%.

Agent-led Actions

external account. This promo will fast track that goal.

Add No Thanks

Never Offered

Agentforce Assistant

Hi! I'm Einstein, an AI assistant. I can do things like search for information, summarize records, and draft and revise emails. What can I help you with?

help me draft an email describing our heloc options

Here is the drafted email describing our HELOC options. Let me know if you need any changes or if it's ready to send.

To: Unknown Customer

Subject: Exploring HELOC Options with Salesforce Trial Org Request & Manage

Dear Unknown Customer,

Salesforce Trial Org Request & Manage offers a range of Home Equity Line of Credit (HELOC) options designed to meet various financial needs. Our HELOC solutions provide flexible access to funds, allowing your company to leverage the equity in your property for growth and investment opportunities.

Our HELOC options come with competitive interest rates and customizable terms to suit your specific requirements. Whether you are looking to finance a major project, consolidate debt, or manage cash flow, our team is ready to assist you in selecting the best option for your business.

We invite you to learn more about our HELOC offerings by visiting our website or contacting our support team for personalized guidance. Our goal is to provide you with the financial tools necessary to achieve your business objectives.

Best regards,
Jose Sifontes
Salesforce Trial Org Request & Manage

Copy Draft

Recommendations

- Send the email.
- Revise the email to include details about the application process.
- Revise the email to include the current interest rates.

Describe your task or ask a question...



Q 검색...



세그먼트
모든 세그먼트

새로 만들기

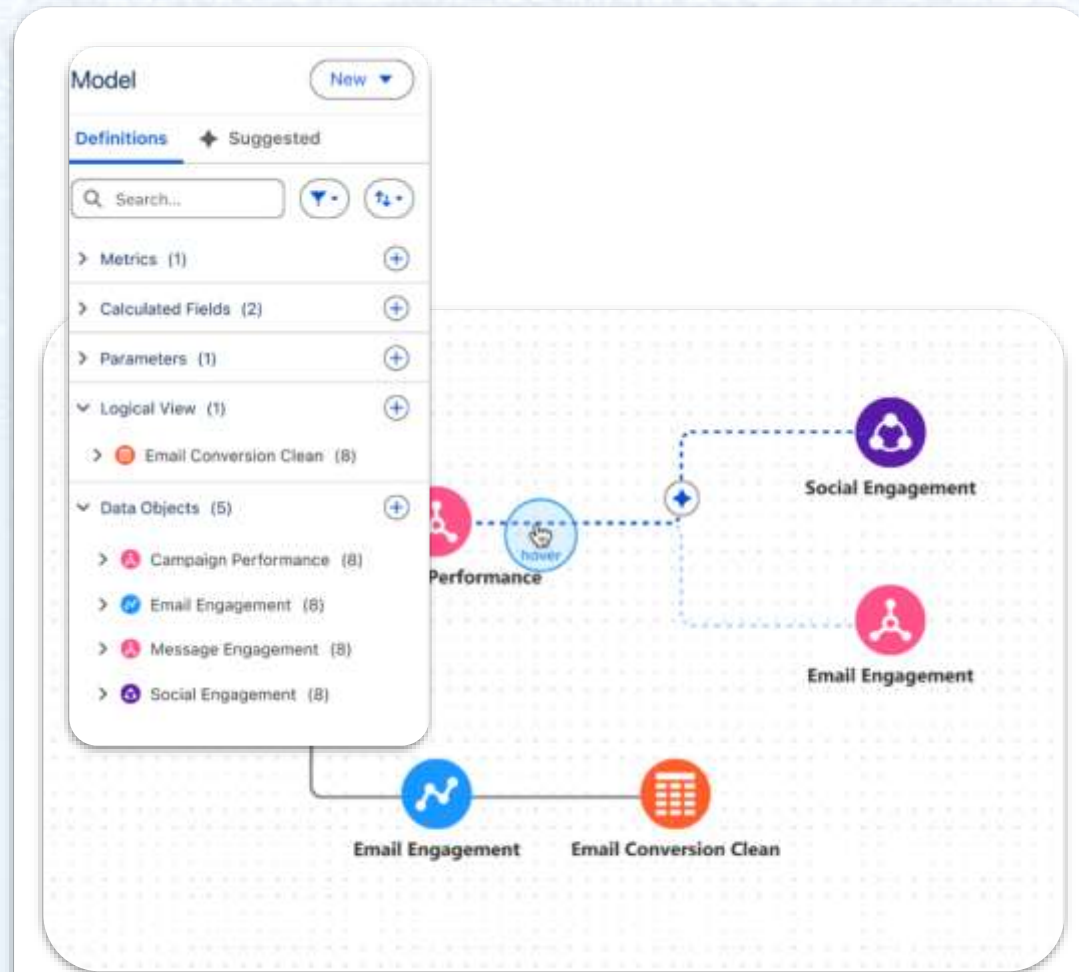
항목 2개 · 정렬 기준: 세그먼트 이름 · 필터 기준: 모든 세그먼트 · 및 초 전 업데이트됨

이 목록 검색... [Settings] [List] [Refresh] [Share] [Filter]

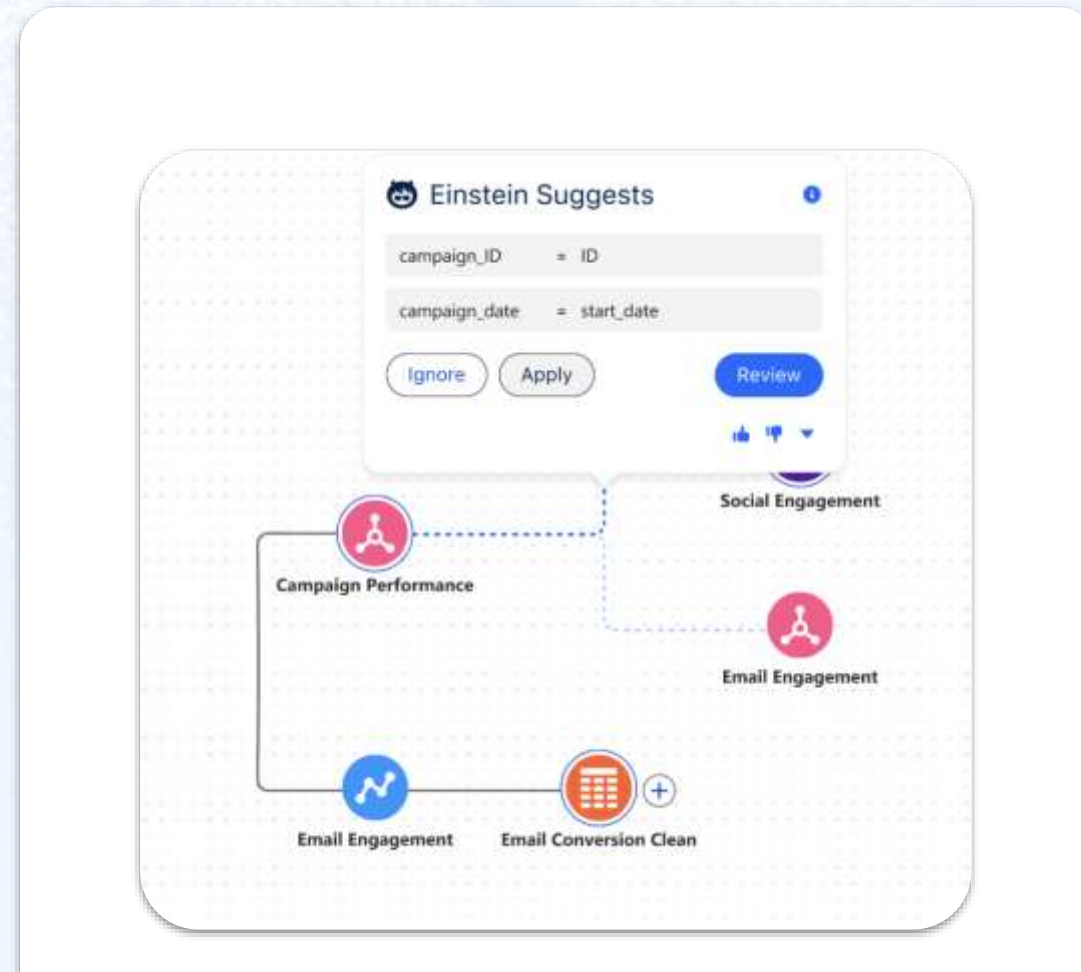
세그먼트 이름 ↑	데이터 공간	게시 유형	세그먼트 상태	모집단	게시 상태	작성자	작성 일자	최종 수정 일자	마지막 게시 완료
1 AllCustomers	AIWorkshop	표준	활성	1	성공	STroo	10/31/2024, 2:08 오후	10/31/2024, 2:19 오후	10/31/2024, 2:19 오후
2 Laptops Interest	default	표준	활성	35	성공	STroo	8/11/2024, 10:00 오후	9/3/2024, 8:34 오전	9/3/2024, 8:34 오전

랩탑 프로모션 대상자를 뽑기 위해 세그먼트를 만드는 과정을 보여드리겠습니다.

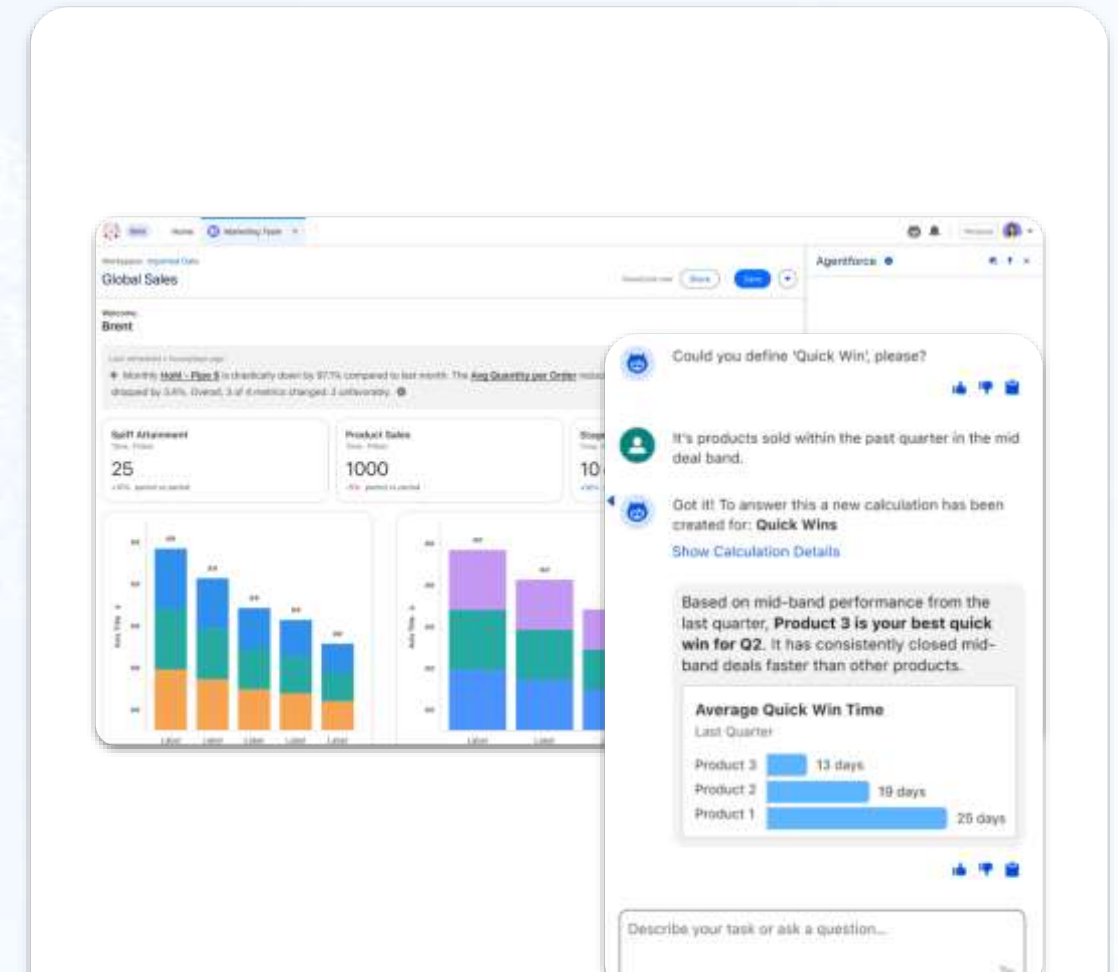
Data Cloud with Tableau Next



데이터의 통합과 처리



데이터의 정의



비즈니스 컨텍스트로 강화된 에이전트 활용

Agenda

salesforce

Intro

Salesforce Data Cloud에 대해 간략히 소개합니다.

데이터 연결 / 운영 (모델링)

데이터 수집, 변환, 통합 프로파일 구성 및 데이터 활성화까지의 Data Cloud의 여정을 알려 드립니다.

데이터 활용

마케팅, 고객 360 및 Agentforce 등 다양한 데이터 클라우드의 유즈 케이스를 보여 드립니다.

데이터 관리

데이터 접근 제어, 프라이버시, 감사 추적 등 Data Cloud의 거버넌스 기능에 대해 알아 봅니다



Data Cloud 작동방식을 알아보면



- OOB 커넥터
- API 및 SDK
- 제로카피
- 비정형 데이터

연결

운영
(모델링)

활용

관리



Data Cloud 거버넌스 아키텍처



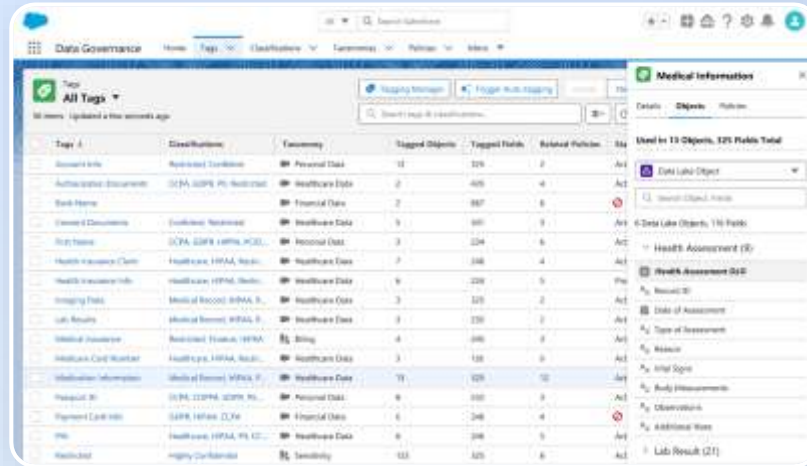
포괄적인 거버넌스 프레임워크 제공



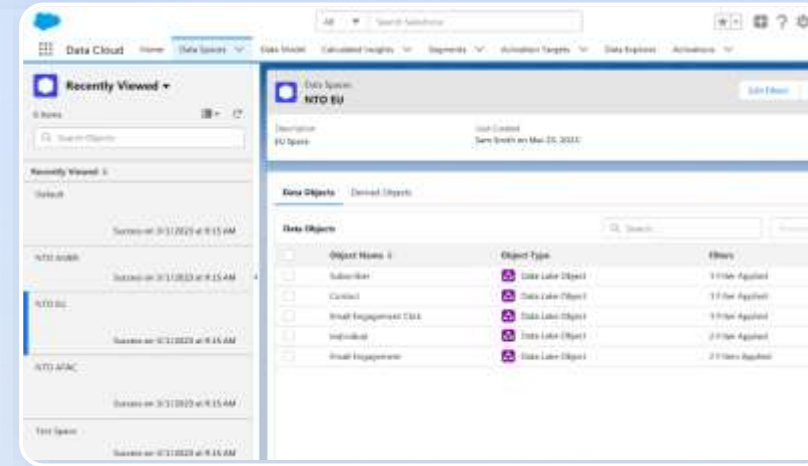
Data Cloud 거버넌스 & 보안

salesforce

Governance

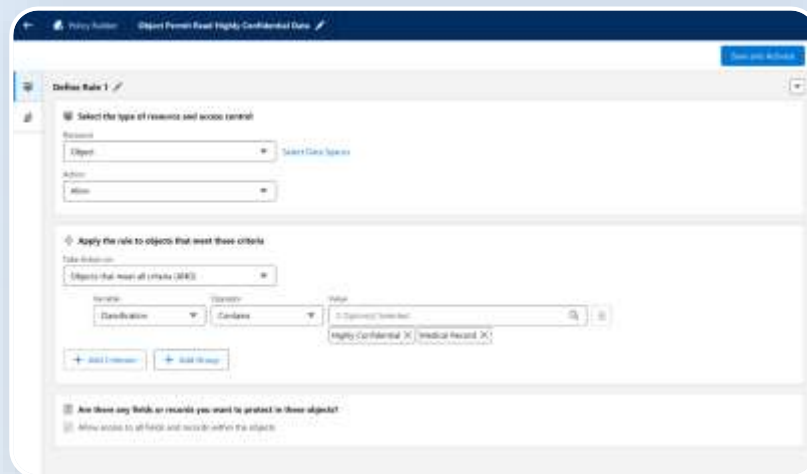


AI Tagging and Classification
AI기반 데이터의 분류

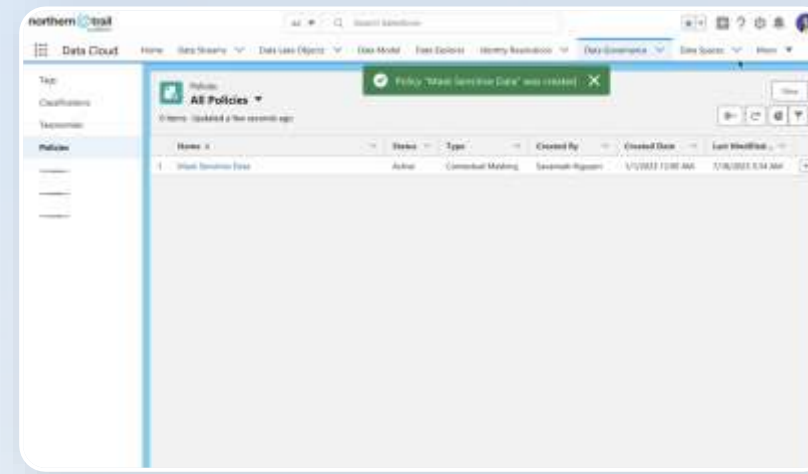


Data Spaces
부서별 / 법인별 데이터의 논리적 구분 관리

Policy Based Governance

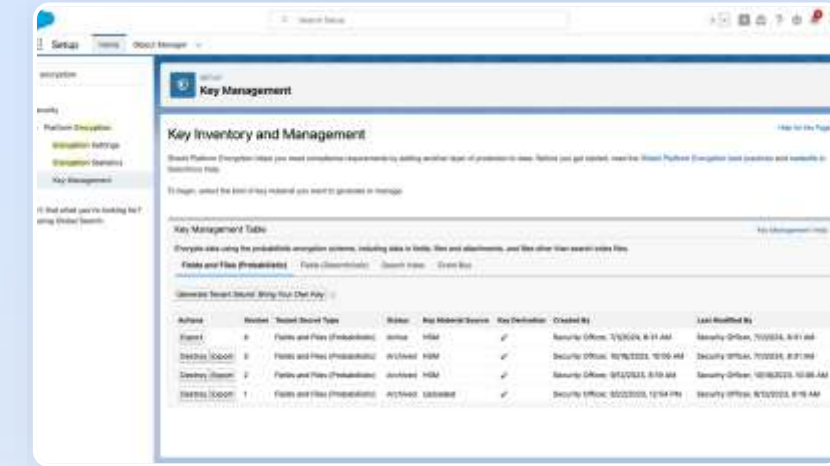


Access Policies
조직 정책에 기반한 데이터 접근관리

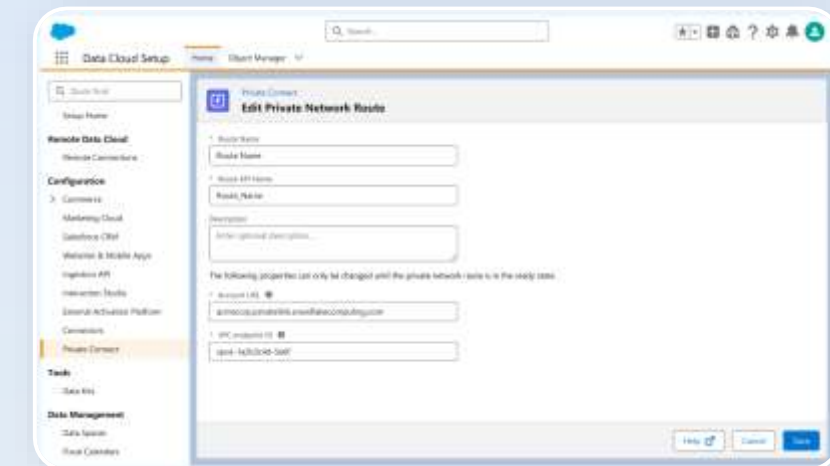


Dynamic Data Masking Policies
데이터 마스킹 정책 적용

Security



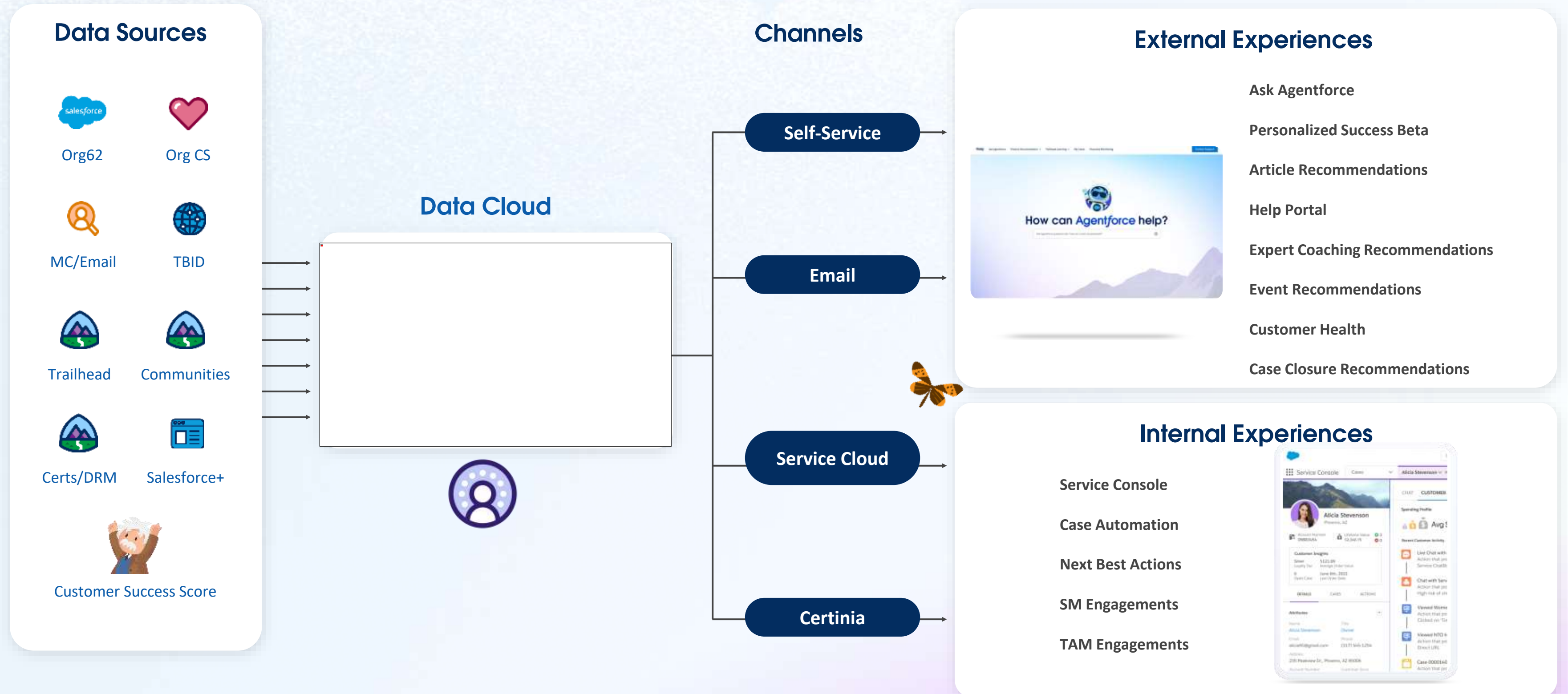
Platform Encryption for Data Cloud
데이터 암호화 지원



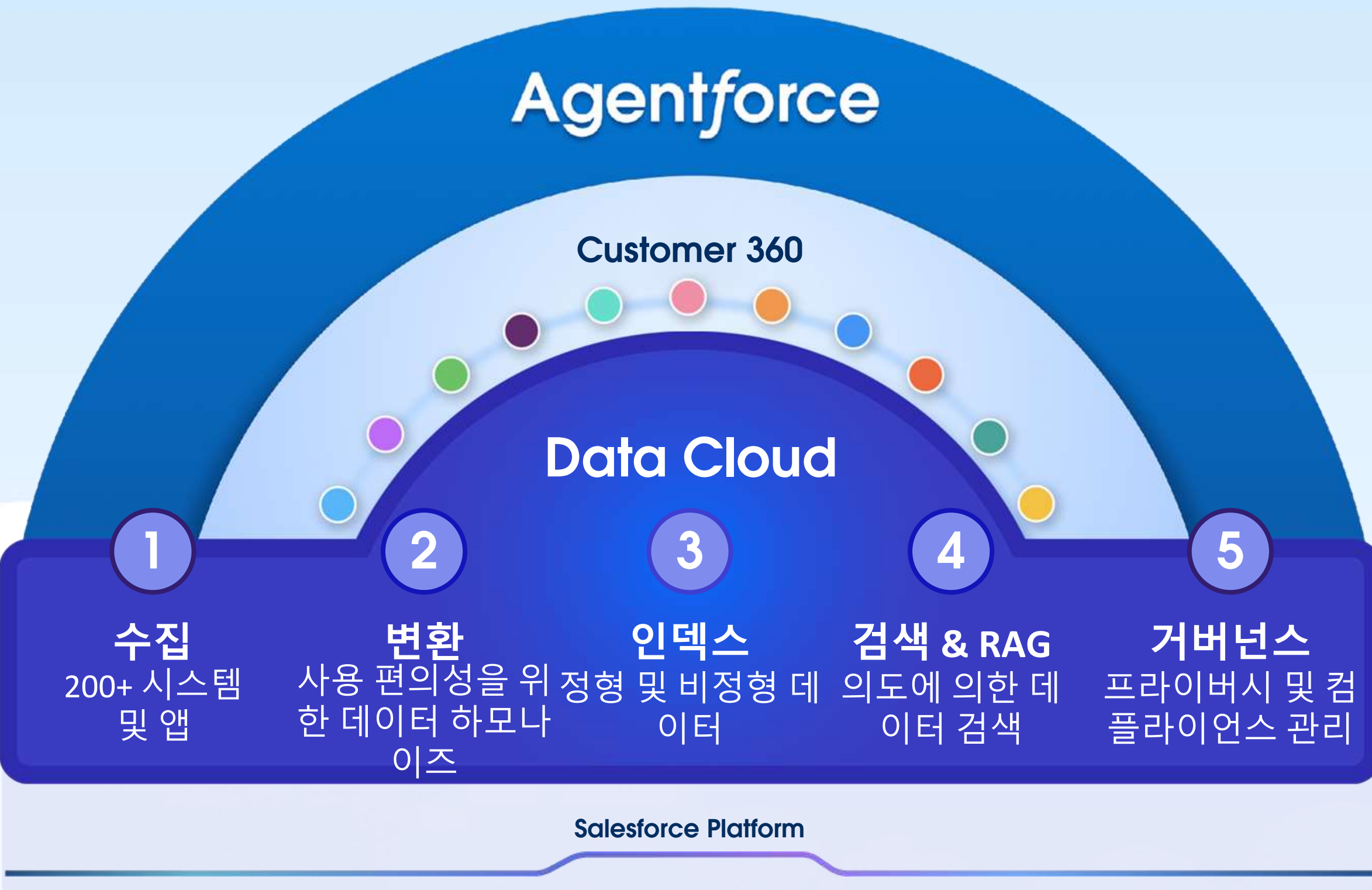
Private Connect for Data Cloud
AWS VPC망과 전용망 구성을 통한 네트워크 관리

AI 시대의 기반, 그것이 Data Cloud

Salesforce on Salesforce



Data Cloud = 고객 360과 Agentforce를 위한 핵심 엔진





**Thank
you!**

