Turn Data into AI Agents

Transform customer and employee experiences with AI agents built on your business data

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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 that 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 also looking for better experiences. They expect instant access to customer data, so they can 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 users complete tasks. Now, in the latest wave of AI, what was once visionary is possible: say hello to AI agents.

Today, you can build AI agents fueled by your business data that can perform routine tasks, uncover insights, and do work without detailed instructions for each action. These AI agents will help deliver the types of experiences your customers are looking for, at scale, while allowing your employees to spend more time on delivering better outcomes and moving strategic initiatives forward. Best of all, they can do this autonomously.

This guide will discuss how, as customer and employee expectations rise, businesses are turning to AI agents powered by their data to meet the moment. To help launch your AI journey, we'll explore some of the challenges of implementing AI and explain how building AI agents on a single platform helps overcome these barriers.

01

Elevating experiences across the board with composable apps and AI agents

01 Elevating experiences across the board with composable apps and AI Agents

To meet rising expectations from both sides, many organizations are looking to build AI agents that leverage their data and CRM to offer unparalleled levels of personalization, efficiency, and responsiveness. In fact, **86% of IT professionals** say their job has become more important since the introduction of generative AI, as game-changing external and internal use cases become possible.

These custom-built AI solutions could include use cases like developing an AI-powered virtual assistant that handles routine inquiries and anticipates behavior so they can proactively engage with customers. Another use case might involve personalizing marketing campaigns to tailor promotions and offers that match individual preferences.

There are also ways for AI agents outside of CRM to benefit customers and employees. For instance, a custom-built AI agents could help summarize product availability and predict shipment delays, providing logistics teams with real-time updates to enhance operational efficiency. To help employees make data-driven stock management and procurement decisions, an AI agents connected to your enterprise resources planning (ERP) data could analyze inventory levels and summarize sales trends.

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.

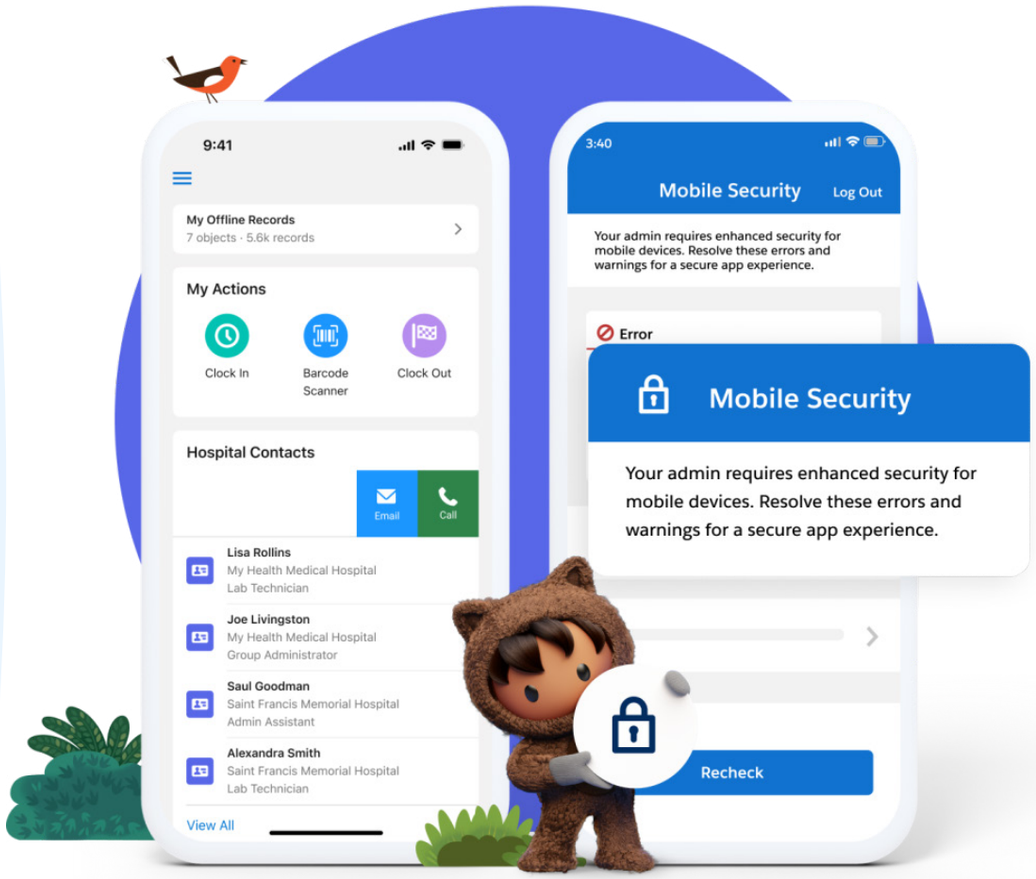
3rd State of IT Report

01

By using AI in CRM and across your organization, you can build AI apps, agents, and experiences that work seamlessly with your customer data. This means that every interaction is grounded in a consistent data model that is unique to your business, ensuring that AI insights, automations, and outcomes are relevant and trusted.

Building AI solutions is a momentous step that promises big rewards. No matter your unique use case scenario for developing AI agents, the goal of using your CRM and customer data is to deliver faster, better, and more personalized customer experiences. This includes reducing manual workloads for core CRM users in sales, marketing, customer service, and ecommerce, as well as users in IT, HR, Finance, and other departments.

Next, let's look at the challenges that hinder efficient AI development to better prepare your organization for success.



02

Considering the challenges

02 Considering the challenges

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 your AI agents. Then, you must map out a strategy that helps your team avoid those roadblocks and enable fast, reliable AI agent development.

As organizations strive to build AI solutions, 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 agents to access and learn from the necessary information, leading to less accurate and useful outcomes.

Challenge: Fragmented customer data

Building fast, exceptional experiences relies on having well-connected data and integrated systems. 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 prevents 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 **28% of applications** are connected, and a staggering **95% of IT leaders** report that integration challenges slow down AI adoption.

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 build AI agents effectively, limiting the overall effectiveness of their solutions in enhancing experiences.

62% of organizations recognize that their data systems are not fully configured to leverage AI.

MuleSoft Connectivity Benchmark Report

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

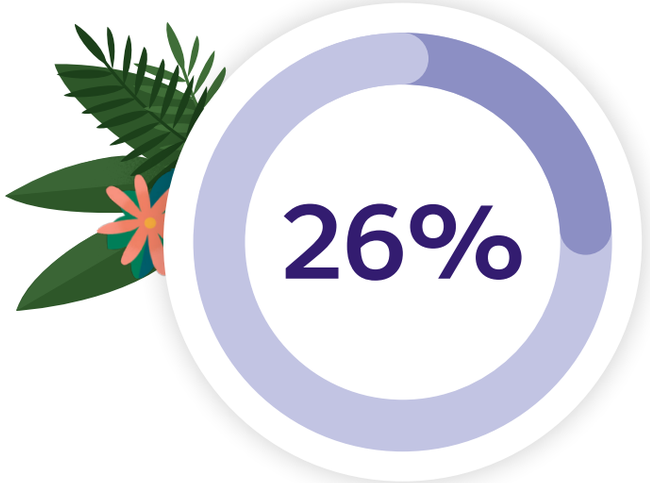
3rd State of IT Report

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 sometimes needed to develop and deploy effective solutions.

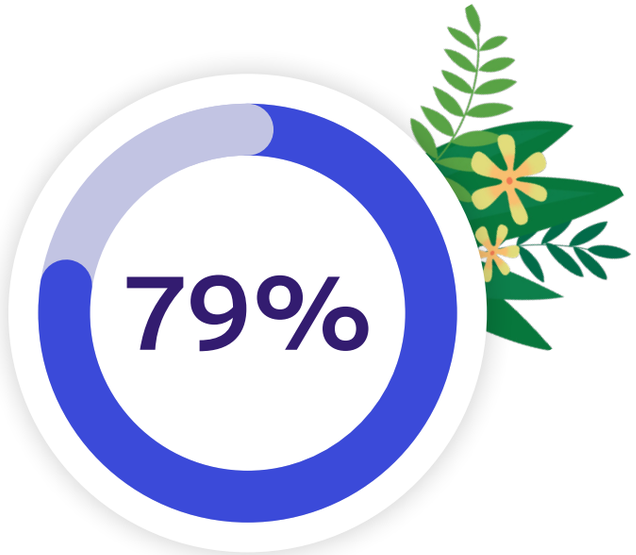
This tension between business expectations and IT resources is a big hurdle for many organizations. **Nearly 3 in 5 IT professionals** feel that business stakeholders have unrealistic expectations regarding the speed and agility of new technology implementations, including AI. This disconnect can lead 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.



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

3rd State of IT Report



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

AI-IT Disconnect

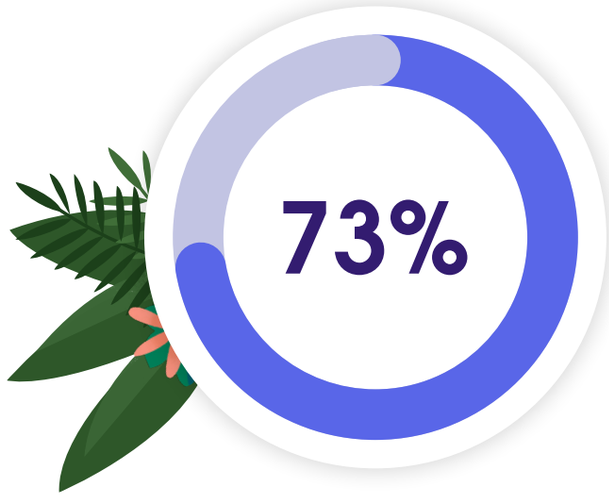
02 Challenge: IT teams need time to understand the AI landscape

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 caution 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 certain AI applications can 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 agents 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 with customers and stakeholders who are increasingly vigilant about the ethical implications of AI.



Approximately 73% of IT leaders are concerned about bias in AI.

Generative AI in IT Survey

03

Four strategies for effective AI agent development

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While building AI solutions comes with challenges, they can be managed with the right strategy. Using these four strategies, you can streamline AI development and maximize the potential value of your AI solutions.

#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. Since agents can be more autonomous and capable of independent action, robust governance frameworks that ensure ethical use, data security, and unbiased decision-making are key.

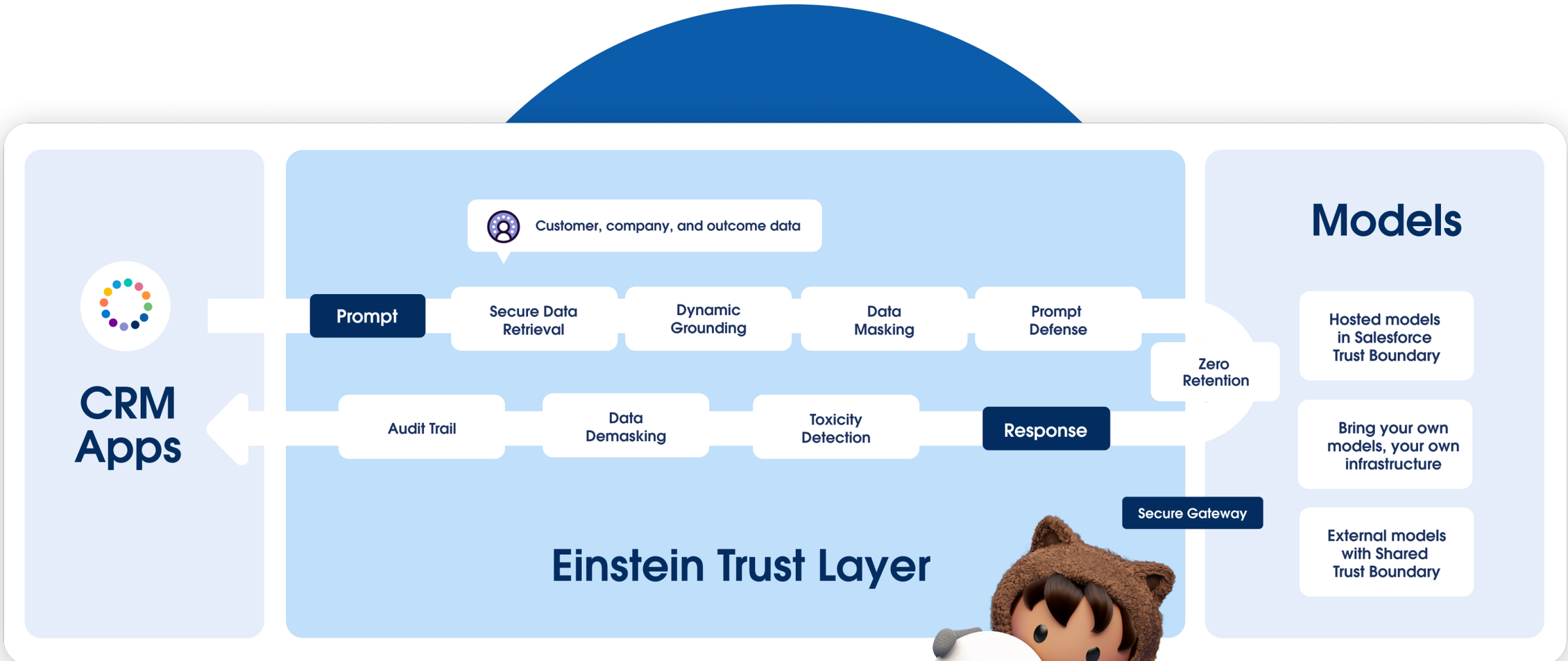
Organizations must prioritize trust from day one by adopting transparent, applicable, and auditable AI practices. Stakeholders should have clarity into how AI decisions are made. Meanwhile, developers also play a critical role in this trust ecosystem. They need tools that promote innovation, ensure data 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

03 Four strategies for effective AI agent development

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.



03 #2: Govern the agentic lifecycle effectively

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

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

77% of IT departments use low-code and no-code tools to reduce development timelines and shift some of the burden to other lines of business.

3rd State of IT Report

03

#3: Leverage your CRM as a single source of truth for all 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 AI with your CRM can enhance your ability to predict customer needs, provide timely solutions, and automate responses.

However, customers aren't the only ones looking for better experiences. Building employee agents on the same platform as 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 flow of work.

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.

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 AI innovation

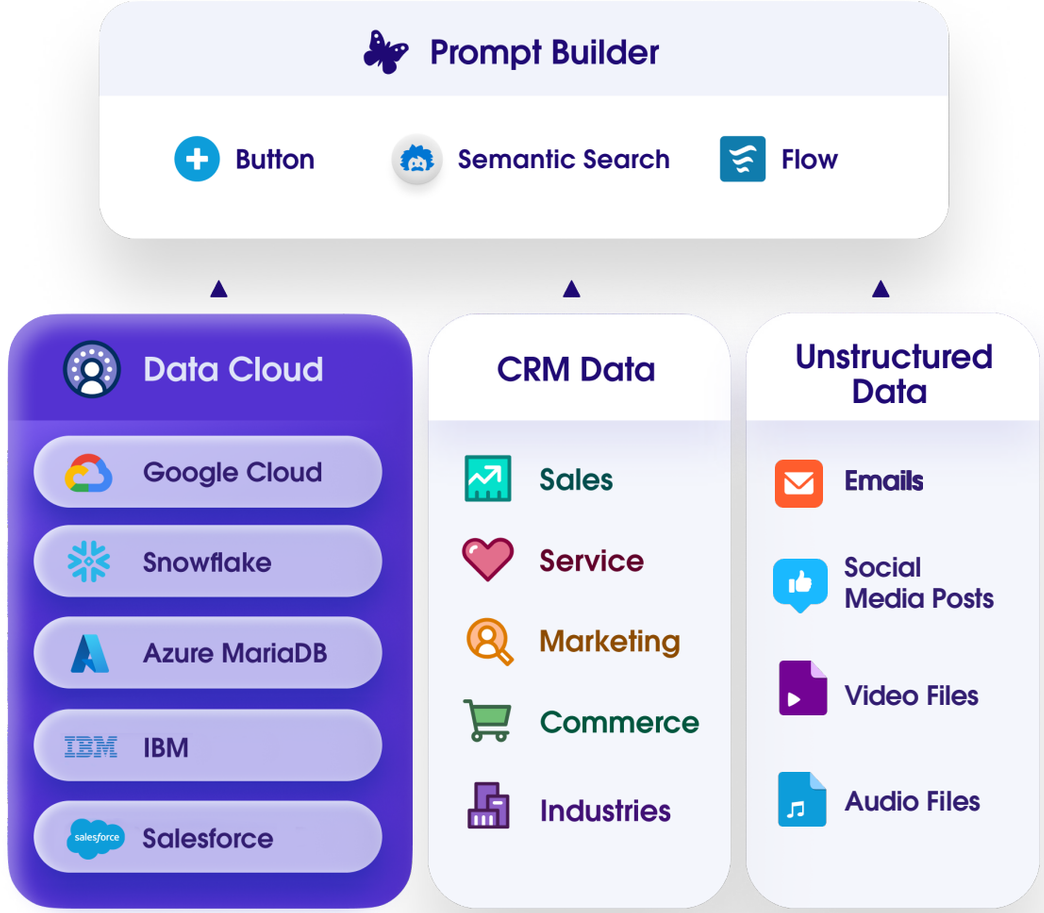
Data is critical in developing AI agents that drive business impact. It fuels algorithms that enable personalized experiences, predictive analytics, and intelligent automation.

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 enables 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 enables 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.



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The benefits of using a native data lakehouse architecture alongside CRM to build AI solutions 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 developers create stronger AI solutions that use diverse datasets for accurate, comprehensive insights.

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

State of Data and Analytics Report

Using these strategies will help your organization confidently embrace its AI vision and accelerate AI agent development. Now, let's explore tools that help you implement these strategies.

04

How the Salesforce Platform helps you build your Agentforce

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Agentforce is what AI was meant to be. It's how humans with agents will drive customer success together. The Salesforce Platform empowers IT teams to simplify the complex landscape of AI agent development. With the Salesforce Platform, your teams will have a suite of robust tools that streamline the process to build your Agentforce.

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 agent strategies to life while avoiding roadblocks and delays.

Using a single platform for AI agent development can significantly speed up your ability to deliver agents tailored to the specific needs of different business units. The Salesforce Platform provides a unified, collaborative environment that supports everyone involved in the process, from coding beginners to seasoned professionals.

This means you can build your Agentforce 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 Salesforce Platform to overcome IT obstacles and power their app development initiatives.

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 new products.

Read the story

Southwest

At Southwest, care is embedded into every department, team, and job function. A prime example of this high standard of care is the company's commitment to accessibility. To ensure that people of all abilities at the company have the tools they need to deliver exceptional customer experiences, Southwest used Salesforce Platform to develop an in-app chat solution that helps differently abled employees easily perform everyday tasks. The Tech Ops team also uses low-code applications to track workflows and route cases to IT so requests can be fulfilled in a timely manner.

Read the story

Conclusion

Accelerate your Agentforce journey

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

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

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

Read the DevOps Guide to Salesforce

Salesforce Sandboxes

DevOps Center