POLISH DREAMIN'

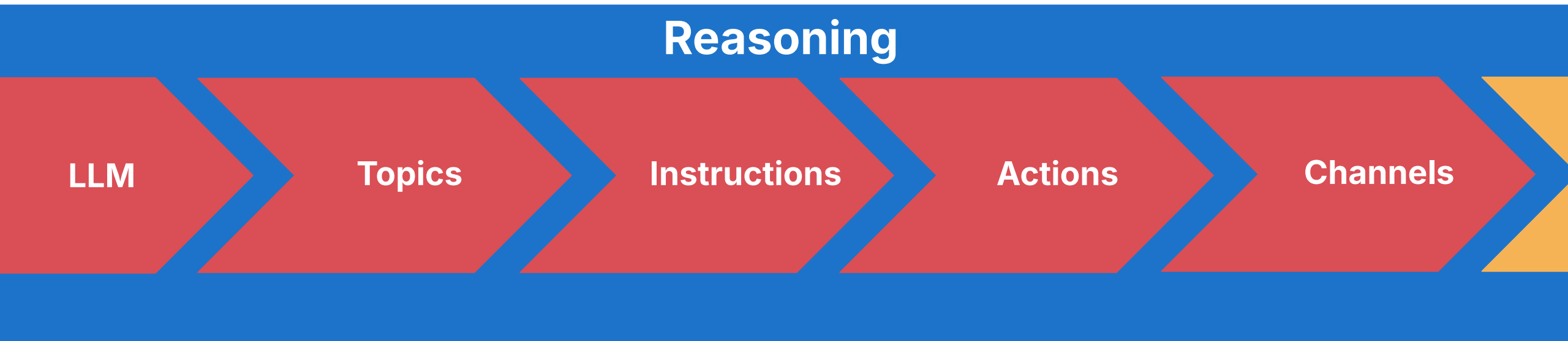# From Salesforce to Agentforce
The good, the bad, the future

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Salesforce MVP & Architect

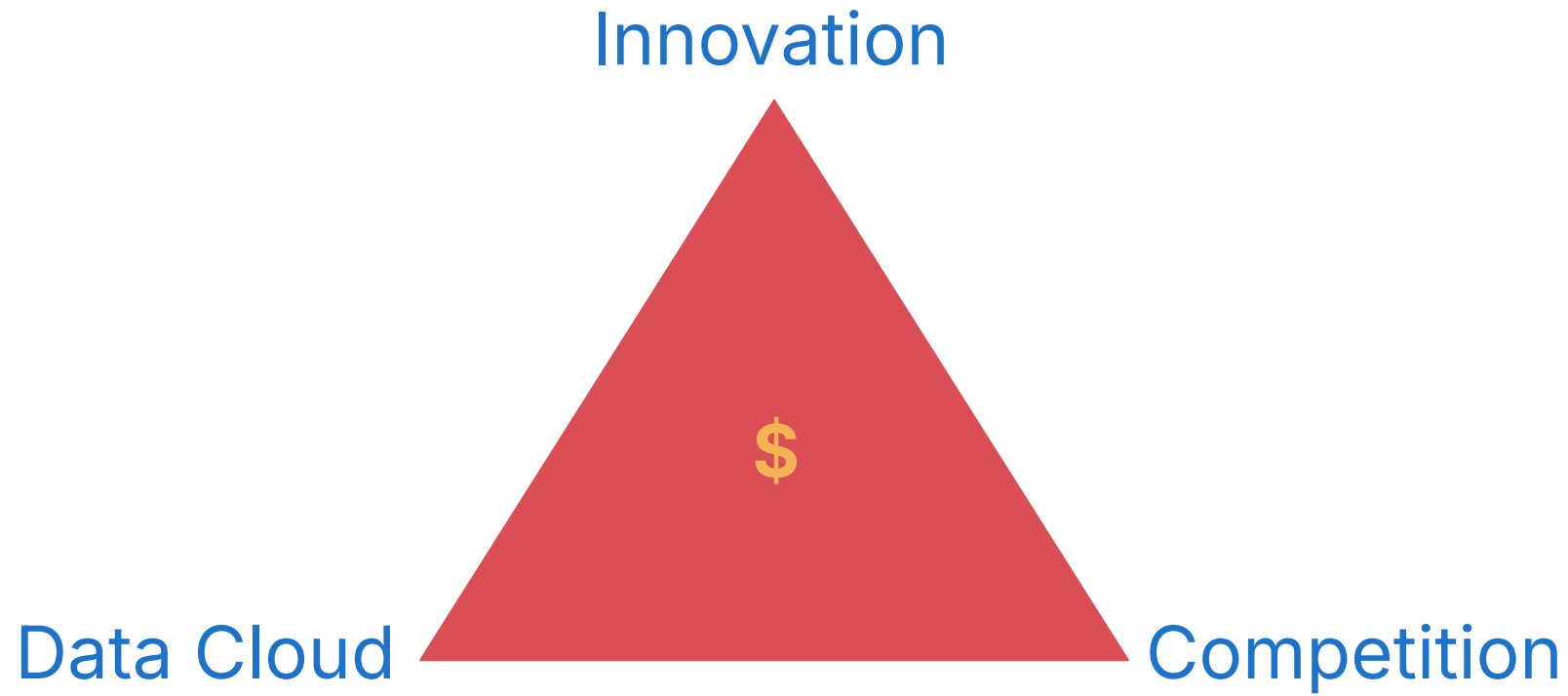# What is Agentforce?

Reasoning

LLM ➤ Topics ➤ Instructions ➤ Actions ➤ Channels

What really is Agentforce?

Question

Chat

Response

Select the best topic(s) & action(s)

Secure data retrieval & dynamic grounding

Prompt Security (injection & toxicity)

Data Masking & Zero Retention

Monitoring & Analytics

Audit Trail & Feedback

Guardrails, Quality & Toxicity Validation

Data Unmasking

LLM

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Why is Agentforce?

How much is Agentforce?

Agentforce Pricing	Assistive Agent Agents available inside CRM for company employees (i.e. Copilot, Sales Coach)	Autonomous Agent Agents talking to the customers through external channels (i.e. Experience Cloud, Slack, WhatsApp)
Licence	Paid per user per month	Free
Conversation	Free	$2 per conversation
Usage	1. Einstein AI Requests for all LLM API calls 2. Data Cloud Credits for Einstein Trust Layer features 3. More Data Cloud Credits if Agent use Data Cloud (i.e. Knowledge & RAG)	
Channel	Free	Requires licence for used channels

Salesforce Foundations is available for free for EE+ customers. It includes Data Cloud, Agentforce plus a pool of AI Requests and Data Cloud Credits that can power around 100k (basic) conversations a year.

Agentforce Testing Center is available for free and doesn't have a Conversation cost, but it does burn through Usage cost.

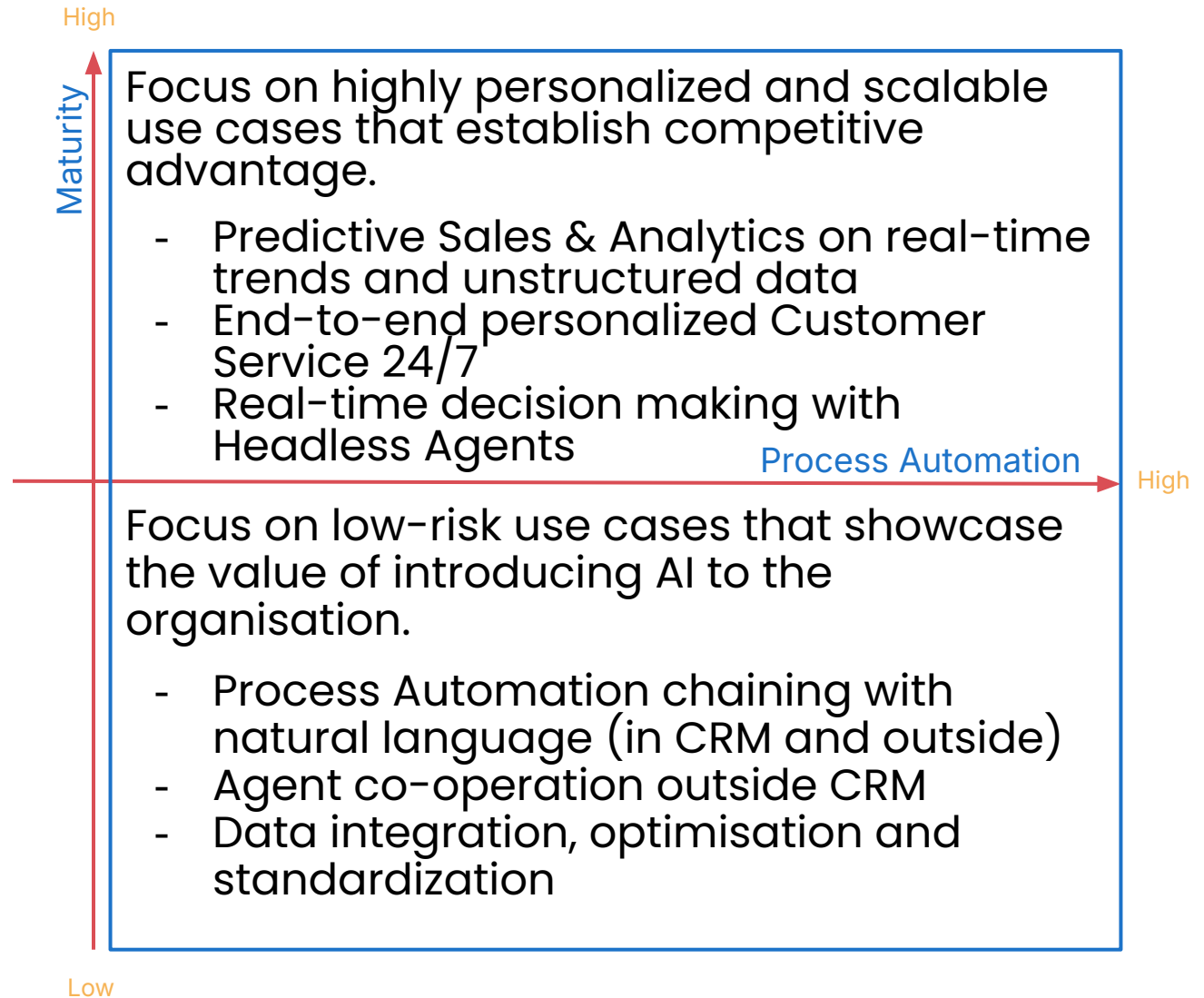POLISH DREAMIN'

Why pay for Agentforce?
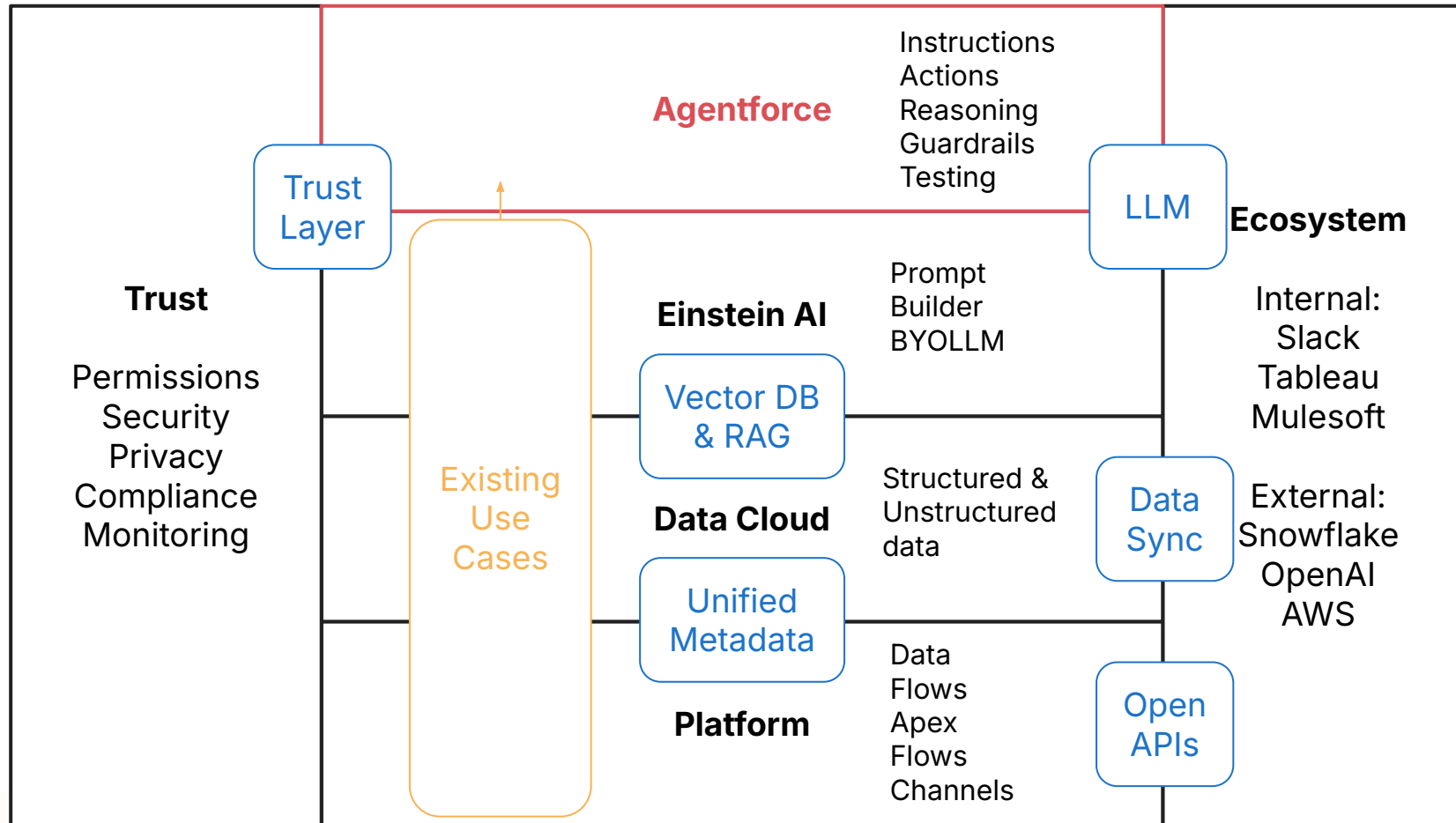
Who should Agentforce?

Focus on removing manual labour and automating recurring and time-consuming tasks.

Start with Flow and Einstein features.

Agentforce can help with:

- Internal & external FAQ Agents
- Work planning based on CRM
- Object summaries
- Sales training

High

Maturity →

Focus on highly personalized and scalable use cases that establish competitive advantage.

- Predictive Sales & Analytics on real-time trends and unstructured data
- End-to-end personalized Customer Service 24/7
- Real-time decision making with Headless Agents

Low ————————— **High** (Process Automation)

Focus on low-risk use cases that showcase the value of introducing AI to the organisation.

- Process Automation chaining with natural language (in CRM and outside)
- Agent co-operation outside CRM
- Data integration, optimisation and standardization

Low

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The Good

1. Easy to set up

2. Massive build around LLM integration available OOTB

3. Leverages existing platform solutions (standard and custom)

4. Available for bi-directional integration with external solutions

5. Huge amount of easily accessible knowledge

6. Ongoing heavy development by Salesforce

7. Free to test

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The Bad

1. Pricing
2. Ongoing heavy development by Salesforce
    a. Stability & reproducibility issues
    b. Ongoing changes to product naming and structure
    c. Constantly changing roadmap
3. Limited support for issues (quickly getting better!)
4. Limited optimisation guidelines
5. Poor DevOps experience
6. Huge dependency on architecture, automation and data quality

The Future

1. **Improved reasoning** » Variables, speed and better RAG

2. **AgentExchange** » Agentic Marketplace, cross-platform integration

3. **Availability** » New channels, multi-modality, API

4. **Ease of use** » Agent generation with prompts

5. **Trust** » Improvements to testing, debugging & monitoring

6. **Control** » Guardrails, templates and formatting

7. **Positioning** » Agnostic Command Center for Agents

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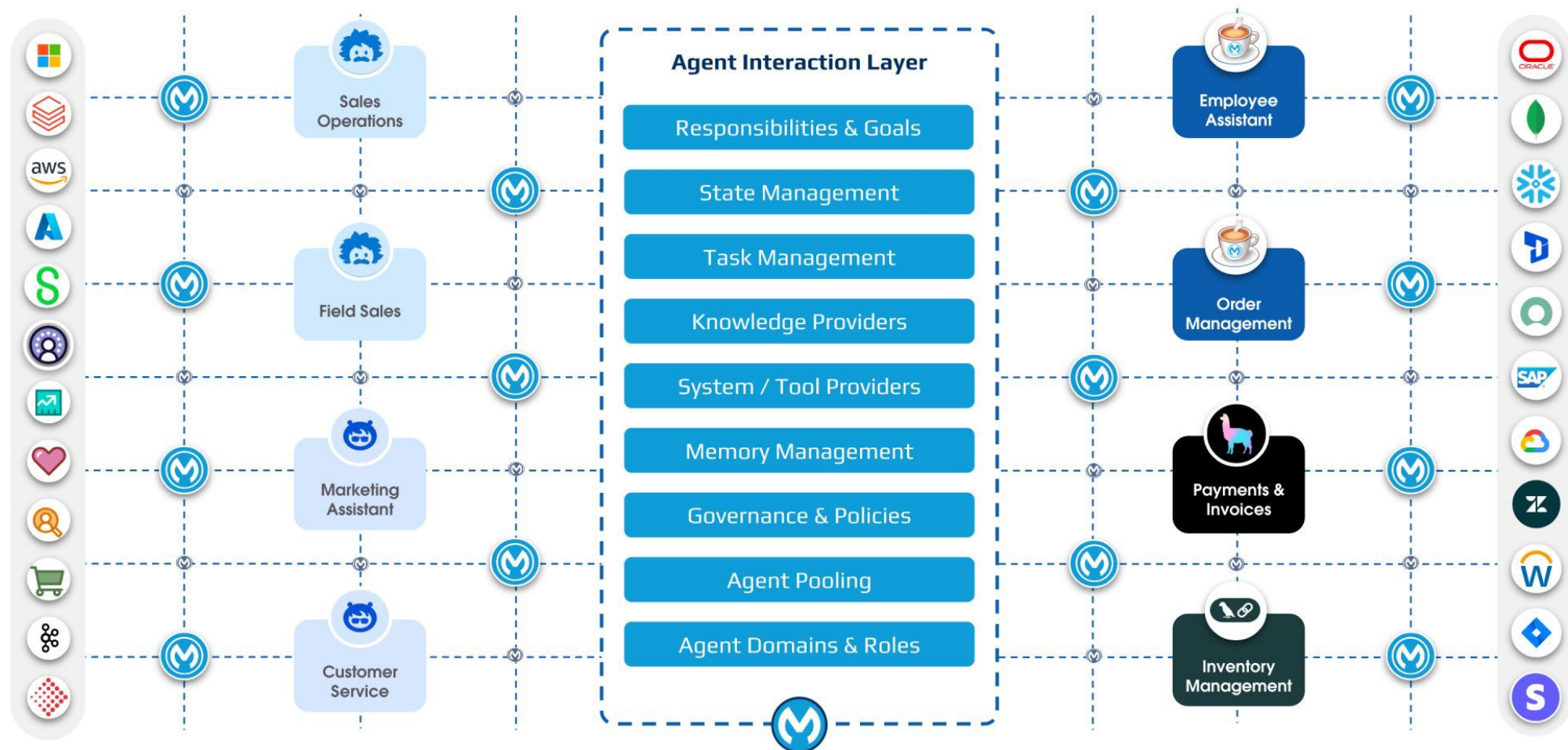
The Approach

Assistive Agent OOTB	Assistive Agent Custom	Autonomous Agent OOTB	Autonomous Agent Custom

Assistive Agent OOTB
1. Start with Assistive Agents
2. Leverage OOTB features as much as possible
3. Learn the platform features and limitations
4. Find & empower Agentic Champions

Assistive Agent Custom
1. Work with Champions to identify most time consuming processes ripe for automation
2. Build, deploy & monitor ROI
3. Scale across company

Autonomous Agent OOTB
1. Work with employees to find customer facing processes that are extremely time consuming
2. Run PoC on a single process
3. Monitor behaviour and ROI
4. Extend with new channels and processes

Autonomous Agent Custom
1. Work with employees to find customer facing processes that are either:
   a. extremely time consuming or
   b. unique in the market
   but low impact and not on SF Roadmap
1. Run PoC on limited target

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Best Practices

1. Not everything needs to be Agentic
2. Start small with PoC
3. Start with internal use cases (cost/risk)
4. Start with standard actions (stability/support/effort)
5. Start with very time consuming processes (easy ROI)
6. Optimise use cases to minimise the conversation switching (cost)
7. Use AI (SF or external) to help writing the prompts and instructions
8. Prepare (a lot of) time for testing/debugging/support talks
9. Estimation rule of thumb:
   a. 50% Discovery & planning
   b. 10% Build
   c. 40% Testing & debugging

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