



AI Ready in 20: Your First Data 360 Win for Agentforce

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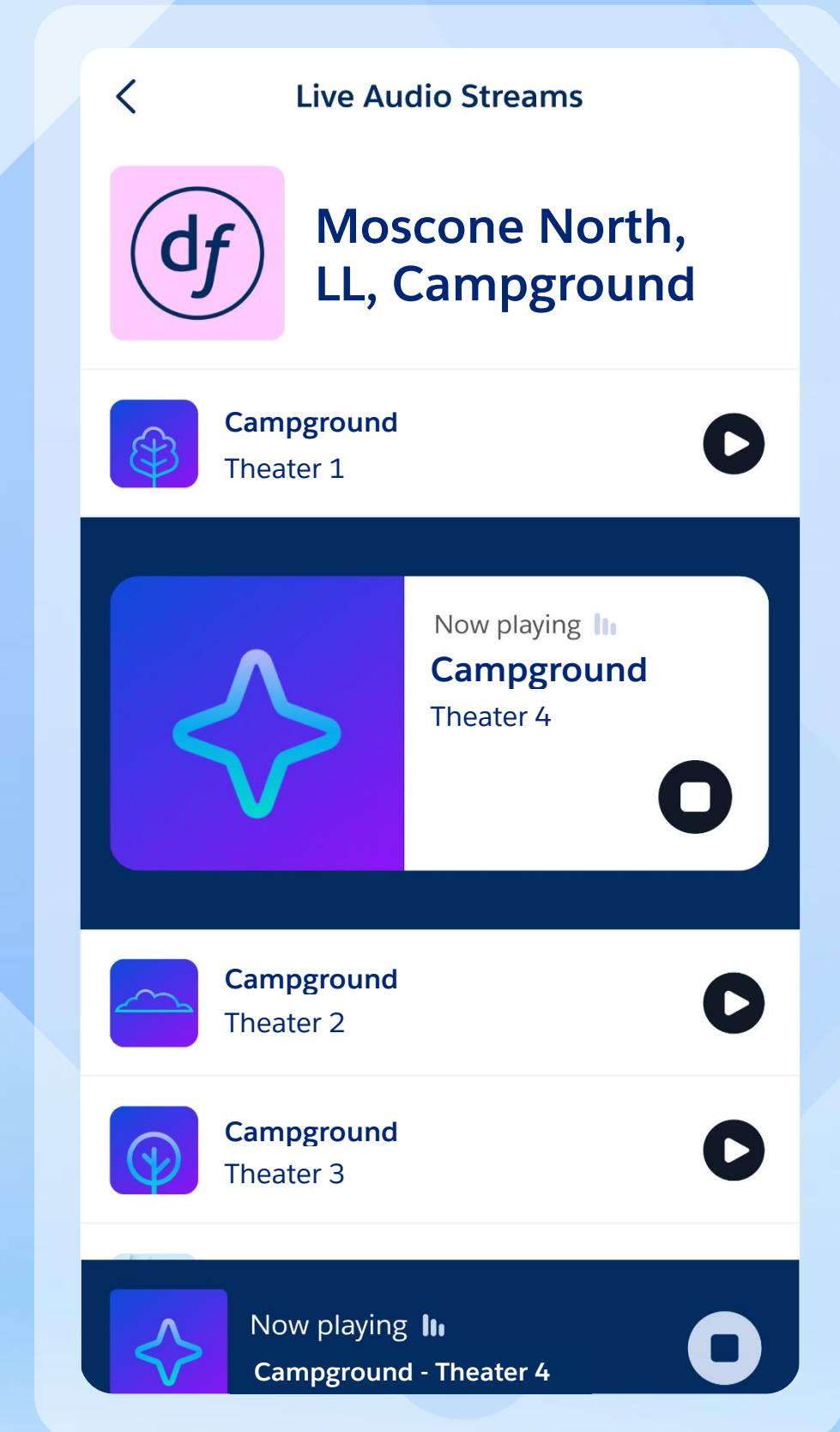
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1. Scan the QR code to open the **Live Session Audio** player.
2. Connect your headphones.
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Prag Ravichandran
Founder & CEO, Skilled Cohort

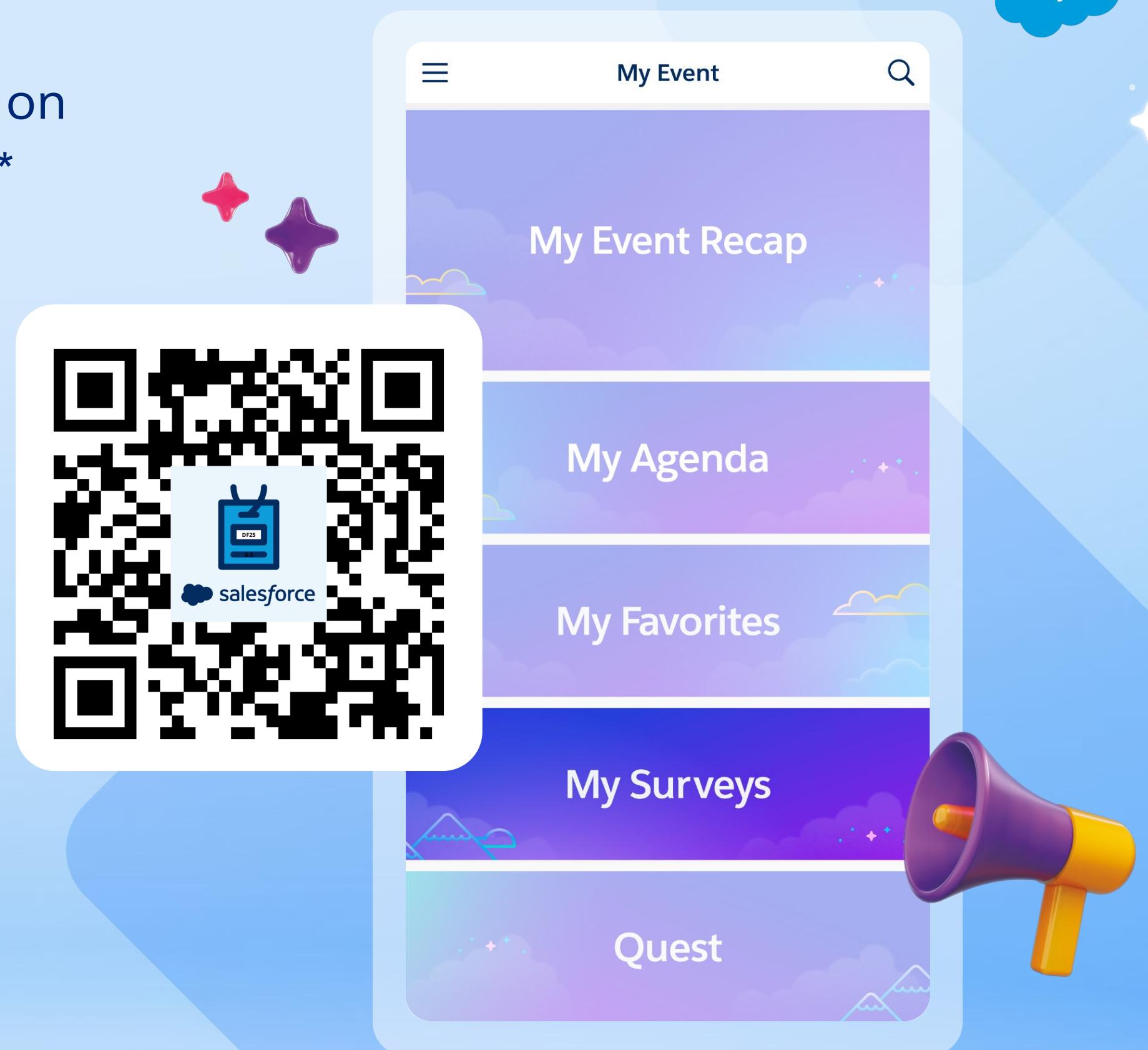


Matt Kaufman
CEO, MK Partners

Coffee on us.

The first 4,000 attendees to provide feedback on this event will receive a \$5 Starbucks gift card.*

1. Download the **Salesforce Events** mobile app.
2. Navigate to My Event, then **My Surveys**.
3. Complete **(4) session surveys** and the **Event Survey**.
4. Redeem your gift at **Badge Pickup** on October 16.



Thank you



Conversational Future: Applications to Data-Centered Interactions



From Applications to Data-Centered Interactions



Clicks -> Chats

In the next 5 to 10 years, we'll shift to seamless conversational experiences across all products, including CRM. The technological landscape is evolving rapidly, with data becoming the central element of digital interactions.

As processes change faster in this new era, we're witnessing a evolution: skipping past traditional application layers and returning to a data-centric foundation - what we now call the Agentic Layer.

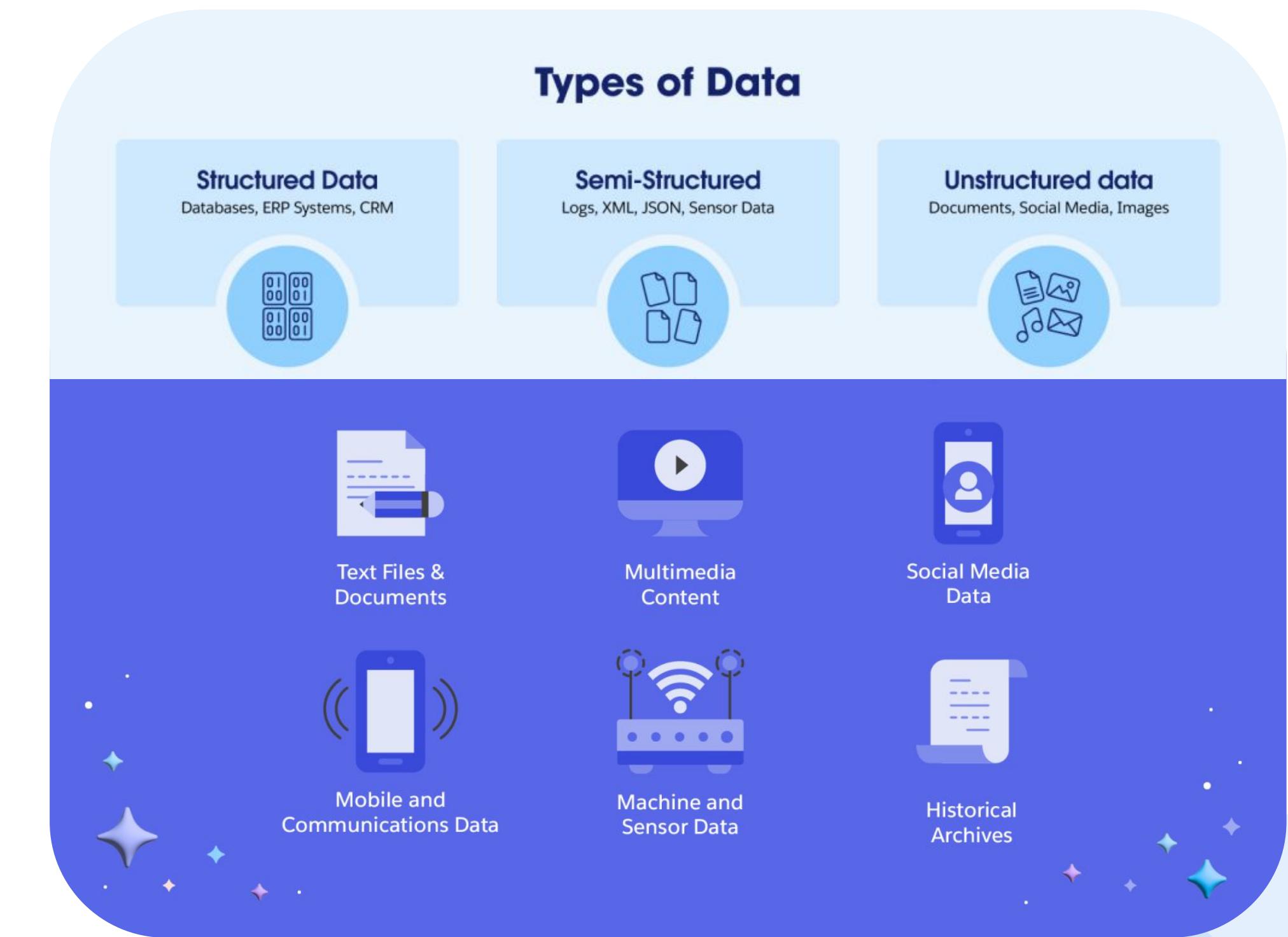


The Data Integration Challenge

How many integrations would you have to build?

Retail company collecting data

- Website
- Customer Loyalty Program
- Email Campaigns
- Order System
- Customer Service
- Social Media and more...



Traditional Approach:

Building integrations one by one =
Linear (slow) progression

The Lead Fragmentation Problem

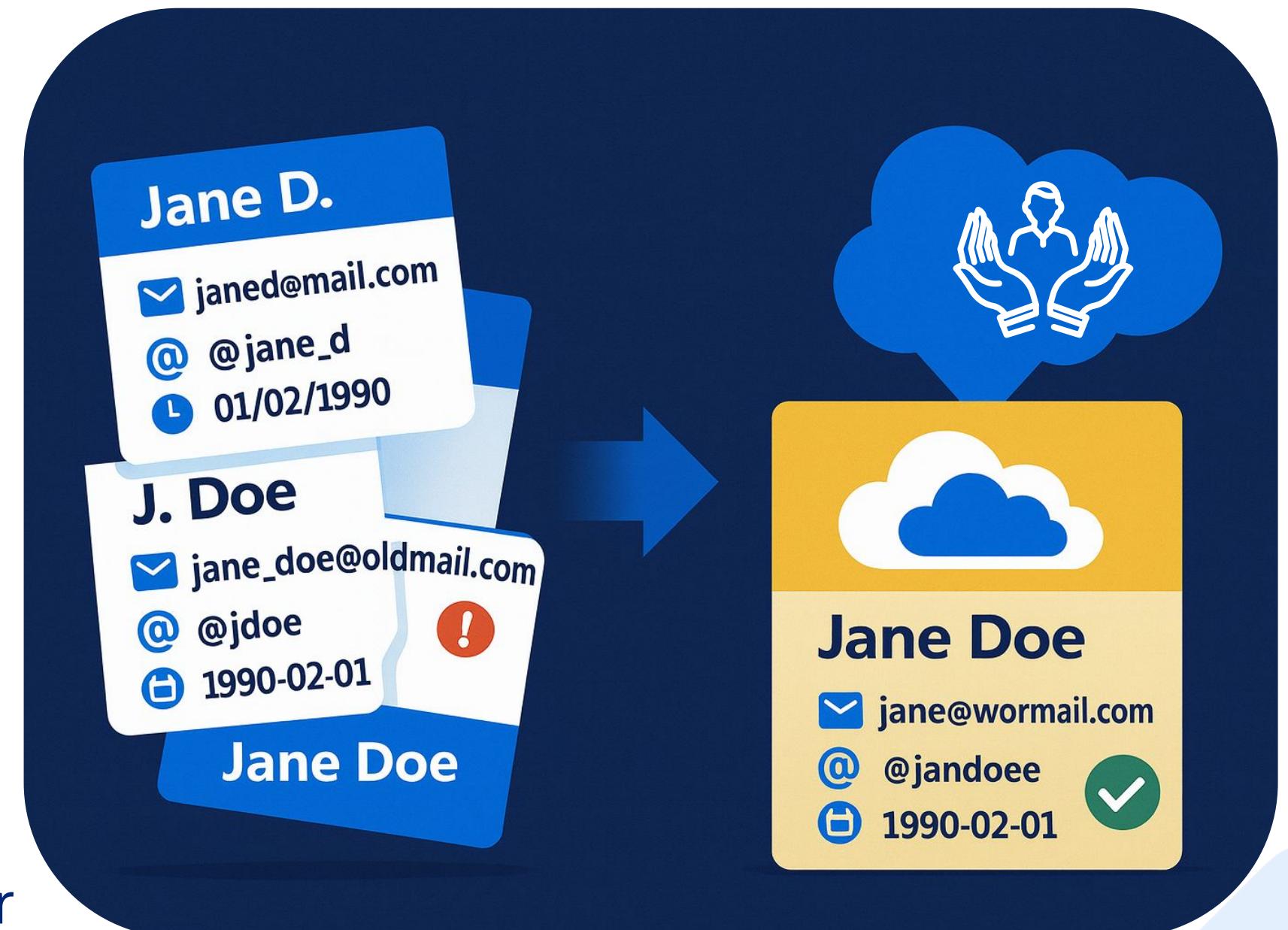
'Yes, I know... I'm already your customer!'

Every customer interaction creates duplicate records

- Website form completions generate new leads
- App installations create separate records
- Event meetings (like Dreamforce) add more duplicates

Why this matters:

- Data keeps growing exponentially
- People have multiple email addresses that change over time
- Real-world identities remain fragmented in your database



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Let's take action!



New Data Stream

Select the data source from which you can ingest or federate data. Only sources that are already connected to Data Cloud appear on this list.

Connected Sources

Ingestion API



Stream and/or bulk upload data from external sources

Salesforce CRM



Import objects from Salesforce CRM

Other Sources

Load a sample file in order to teach the system about your file's structure. At the end of this set up flow, you'll be able to specify where data should be retrieved from on an ongoing basis.

File Upload



Upload file from your local drive

Installed Data Kits & Packages



Import data streams from preconfigured data kits and packages.

Explore Other Connectors

Filter Connectors

Generally Available Beta

New Data Stream

i To ensure data is ingested from fields and objects created in the future, we recommend granting View All Fields (Global) system permission on the Data Cloud Salesforce Connector [Learn More](#).

Select an org to ingest data from, then select an object or data bundle.

* Salesforce Org

[View Bundles](#)[View Objects](#)

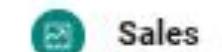
Standard Bundles (4)



Custom Bundles (2)



Bundle Details

**Sales****Type:****Description:****Standard Data Bundle**

Manage leads, track progress, and automate sales processes with ease.

Objects included (3)

[Account](#)[Contact](#)[Lead](#)[Previous](#)[Next](#)

New Data Stream

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MK Partners (Salesforce)

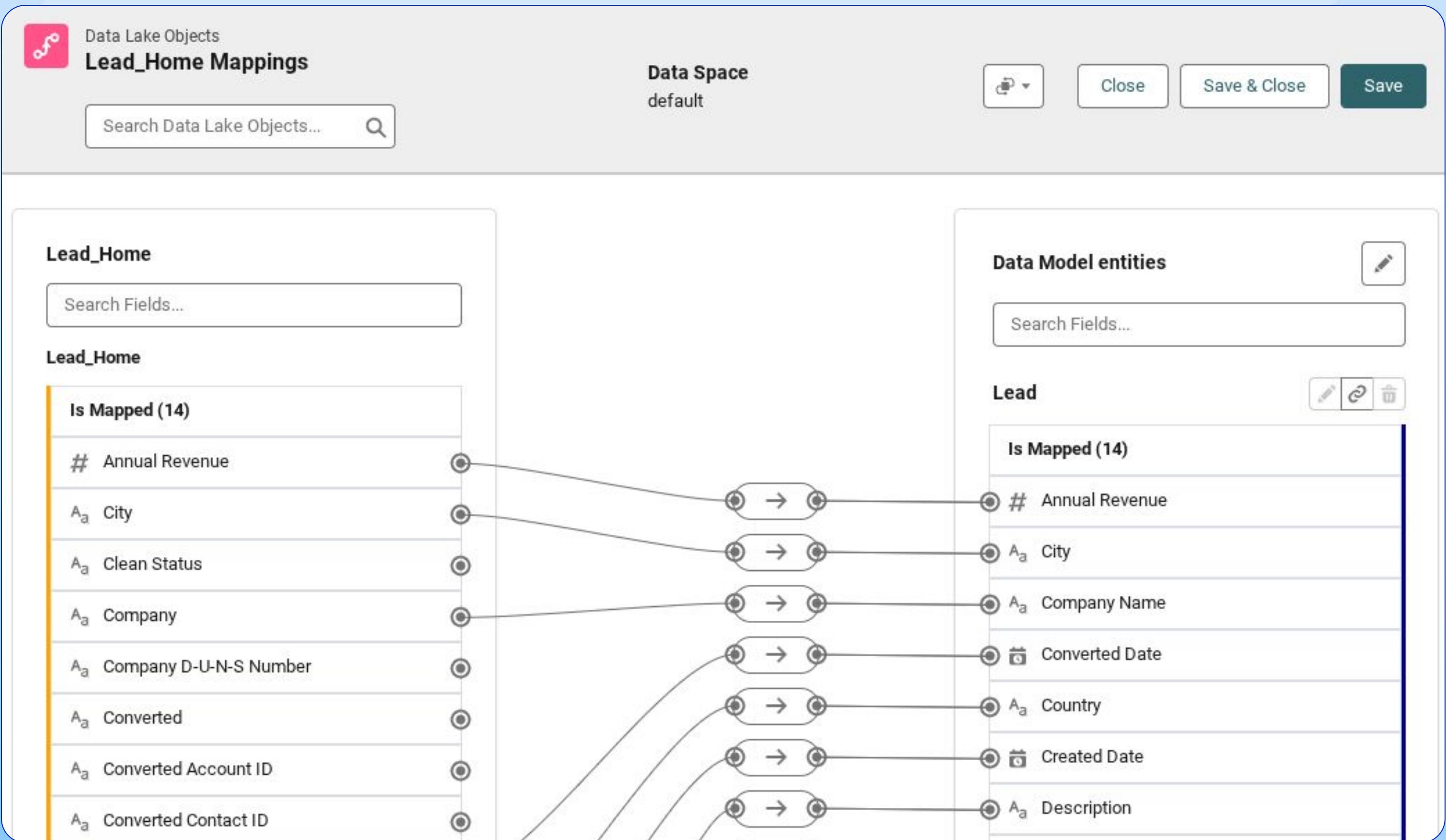
[View Bundles](#)

[View Objects](#)

Salesforce Objects (632)				
Object Name	Object API Name	Data Stream	Is Custom Object	
<input checked="" type="checkbox"/> Lead	Lead	Lead_Home		
<input type="checkbox"/> Lead Feed	LeadFeed			
<input type="checkbox"/> Lead Status Value	LeadStatus			
<input type="checkbox"/> Lead Tag	LeadTag			

[Previous](#)

[Next](#)



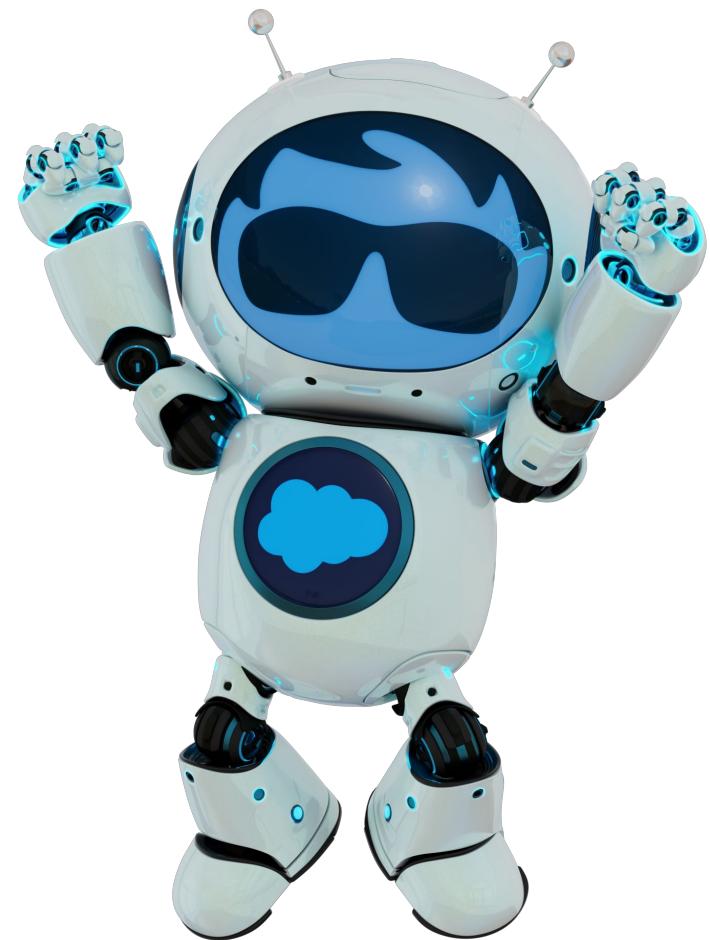
Connect & Unify in Data 360



Deduplication Costs You

Deduplicating is not the answer. When you deduplicate, you're deleting records and losing information.

If you're lucky, you just lose something trivial, like the CreatedDate or LastModifiedBy, but if you're not careful, you can lose vital details about someone.



Unification Preserves Context

Data 360 does not deduplicate, instead, it unifies.

It's able to look at different records and determine that they're really all about the same person based on the rules you configure.

Add Match Rules

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Add Match Rules

Select a default match rule to add to the ruleset, or configure a custom rule.

Match Rules

Match Rule Name	Fields Mapped and Match Rule Available
<input type="radio"/> Fuzzy Name and Normalized Email	✓
<input type="radio"/> Fuzzy Name and Normalized Phone	✓
<input type="radio"/> Fuzzy Name and Normalized Address	✓
<input type="radio"/> Fuzzy Name and Normalized Phone and Normalized ...	✓
<input type="radio"/> Custom Rule	✓

Frequently Asked Questions

What are default match rules?

Default match rules allow you to quickly select one of the common match rule configurations. The number and configuration of available default rules vary depending on the primary data model object you selected. [Tell Me More](#)

How many match criteria should I create for each rule?

All criteria within a match rule must be met for any two records to be matched. Every time you add

Back

Next

 Identity Resolution
Individual Ruleset

[+ Follow](#) [Update Stats](#) [Edit](#) [Run Ruleset](#) [▼](#)

Data Space default	Primary Data Model Object Individual	Ruleset ID ind1	Ruleset Status Published	Last Job Status Succeeded	Last Job Completed 10/6/2025 12:12 AM
-----------------------	---	--------------------	-----------------------------	------------------------------	--

Ruleset Properties [Details](#) [Processing History](#)

Match Rules

Fuzzy Name and Normalized Email [Edit](#)

Resolution Summary  Warnings (2)

Total Unified Profiles  **54.73K** / 59.58K Source Profiles

Reconciliation Rules

Matched data sources may provide different values for a single field. Reconciliation rules specify how to select the best value to save to the unified profile. Review default rules and modify as needed. To update multiple fields, use Update Selected.

- Contact Point Address
- Contact Point Email
- Contact Point Phone
- Individual

Consolidation Rate **8%**
The amount by which source profiles were combined to produce unified profiles

Known Unified Profiles **54.73K**
The number of unified profiles made up of at least one known source profile

Anonymous Unified Profiles **0**
The number of unified profiles made up of only anonymous source profiles

[Post](#) [Poll](#)

Share an update...

[Share](#)

Autolaunched Flow

Start

Get Unified Individuals
Get Records from Data Cloud

End

Get Records

Description

Filter Records

Condition Requirements

All Conditions Are Met (AND)

Field Operator Value

Created Date Greater Than or Equal

Field Operator Value

AND Created Date Less Than or Equal

+ Add Condition

Sort Records

Sort Order

Not Sorted

⚠ If you store only the first record, filter by a unique

```
graph TD; Start([Start]) --> GetUnified[Get Unified Individuals<br/>Get Records from Data Cloud]; GetUnified --> End([End]); GetUnified --> GetRecords[Get Records]; GetRecords --> FilterRecords[Filter Records]; FilterRecords --> SortRecords[Sort Records]; SortRecords --> End;
```

Create an Agent Action

Create an Agent Action

Connect an existing action

Actions are how an agent gets things done. To create an agent action, start with the functionality you already have in Salesforce, such as flows or prompt templates. Select an action you want the agent action to reference, and then configure it for use with an agent.

* Reference Action Type

Flow

* Reference Action

 Get Unified Individuals

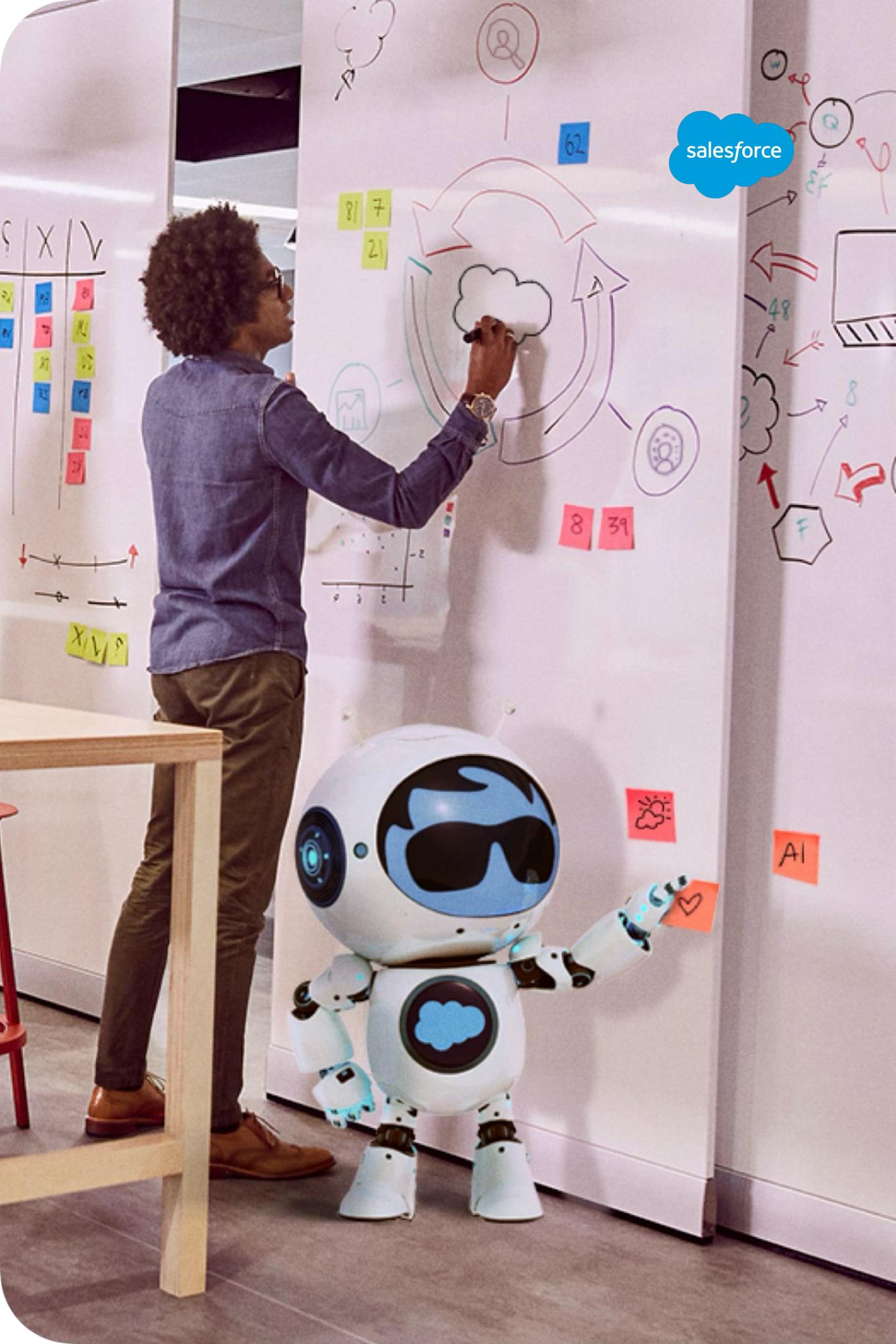
* Agent Action Label

Get Unified Individuals

* Agent Action API Name

Get_Unified_Individuals

Use Data Cloud data in your Flows



AI

Add Your Action to a Topic

← Topic Details

Topic Configuration This Topic's Actions

Manage the actions assigned to your topic. To add or remove actions, your agent must be deactivated.

New ▾

Search actions...

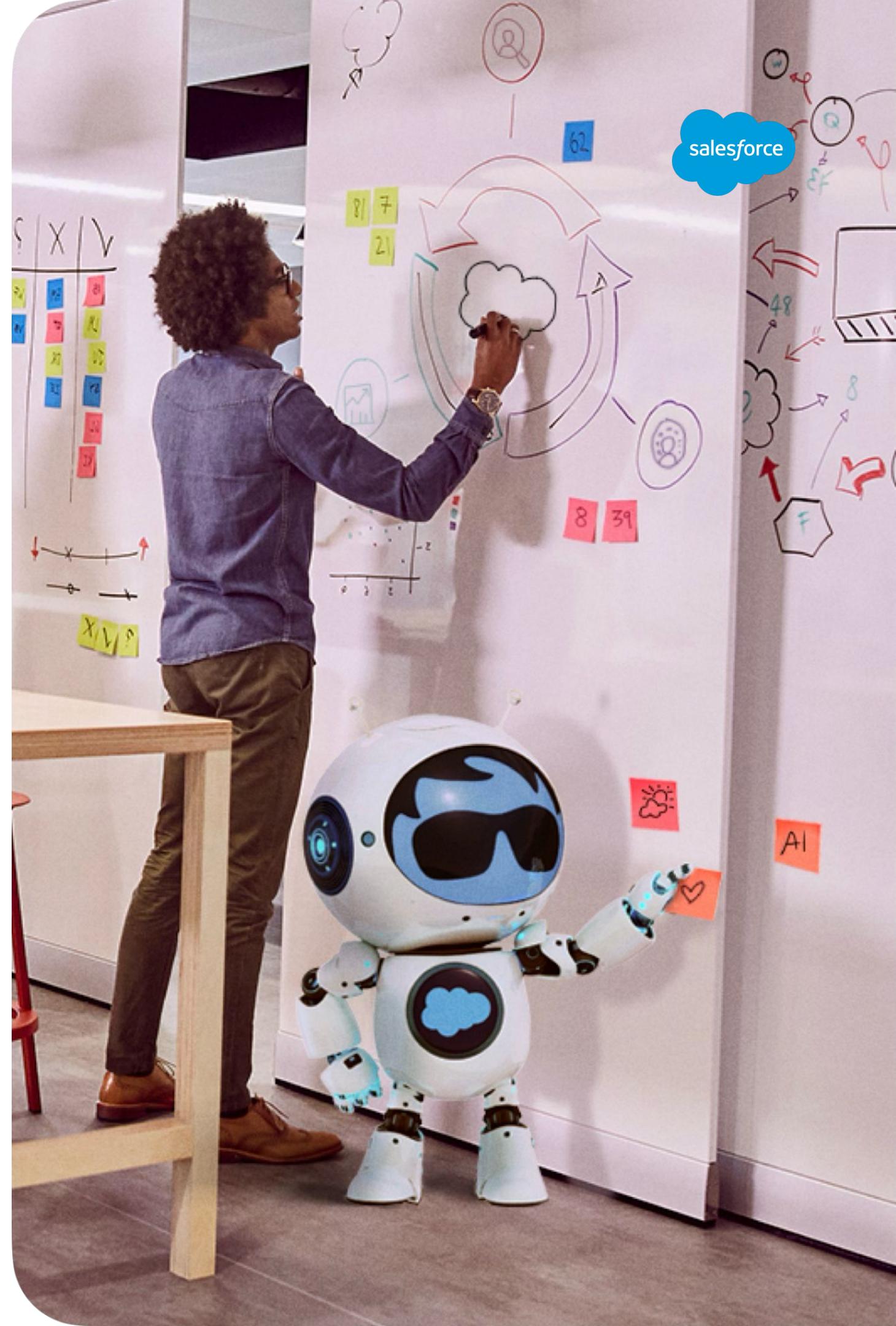
1 items • Sorted by Agent Action Label(asc)

Agent Action Label ↑

Agent Action Label
Get Unified Individuals

New

Use Data Cloud data in your Flows



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From Data Fragmentation to Agent Intelligence



"How many truly UNIQUE and truly NEW leads did we acquire last month?"

Getting simple answers often requires

- Exporting reports to Excel
- Manual cross-referencing across multiple screens
- Time-consuming data manipulation

AI Agents : Analyze vast amounts of

- Interconnected Data,
- Maintain Context
- Deliver answers to Questions



Strengths: Human vs Agent



- Interpreting business needs to Technical Req
- Spot obviously wrong answers(Intuition & Experience)
- Validating answers with contextual understanding
- Creative problem-solving and strategic thinking
- Human relationships and nuanced communication

- Recalling Granular details across LDV
- Remembering information forever
- Multi-tasking with equal attention to all
- Instant Cross-reference across LDV
- Making decisions quickly based on entire database
- Paying attention to everything discussed in a meeting
- Take actions without delay

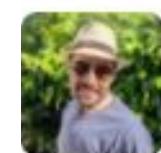
Agentforce + Data 360 for quick answers



How many leads did we get last month that were unique and new?



Here is the count of unique and new leads created last month. Let me know if you need further details.



How many Leads were created Last Month with emails ending in @gmail.com or @outlook.com



There were 10 Leads created last month with an email address ending in @gmail.com or @outlook.com. Let me know if you need further details!



What percent of Attendees at Dreamforce gave our session a great review?



100% You guys were awesome!!!

Key actionable Takeaways



- **Start Simple:** Begin with ONE use case for a quick and easy win
- **Check Your Access:** Verify if you have Data Cloud or Foundations available in your account
- **Activate Data Cloud:** Turn on Data Cloud in your org
- **Master the Fundamentals:** Learn key terminologies (Data Streams, DMO, DLO, Identity Resolution)
- **Your Holy Book:** Maintain your Data Dictionary as the essential reference guide
- **Strengthen Your Skills:** Refresh your Flow automation knowledge
- **Enable Agentforce:** Activate Agentforce capabilities
- **Leverage Trailhead:** Complete relevant learning paths
- **Monitor Usage:** Bookmark your Credit Monitor app to track consumption





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