Go Beyond the Hype: See Agentforce Sales Agents in Action

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Notes:

- Today we're going to go beyond the hype and see agents in action. I ask that you make your purchasing decisions off of products and services that are readily available today. I truly believe that it is your feedback and your input that shapes our products and makes the company that we have today.

- Agent force SDR partnered with the human sellers. The idea is that agent force can automate many of those top of funnel activities. There are four steps for activation. You'll learn a lot about how agent force works from how it's configured.

- The more knowledge you arm the agent with, the better it's going to be at handling conversations. Give the agent pricing deck or pricing PDF, as well as some case studies. It could be as much or as little as you want to.

- AI agents augment the work of the humans, work with them, and maintain the trust of the prospects. When Simon selects a date and a time, the agent books the meeting. Behind the scenes, Heather gets a notification that says a new meeting has been scheduled.

- An agent can multitask and an agent can work across multiple channels simultaneously. We saw how the agent worked inside of email, inside of SMS, and inside of WhatsApp. It has some flexibility that human sellers might not have that can augment the efforts of the sales team.

- Sales coach is actively listening to my conversation with my customer. Our agents are effective because they are supported by the world's number one sales platform. Please attend the sales cloud keynote tomorrow at 01:00 p. m. to hear all of our latest innovations. And quickly, we are giving out zig plushies.

Speaker A **00:00:08**

Should I start?

Speaker B **00:00:09**

Do we have the comment or do we?

Speaker C **00:00:12**

What time is it?

Speaker A **00:00:15**

All right. Hello, everyone, and welcome to Dreamforce. And hello to everyone on Salesforce plus today we're going to go beyond the hype and see agents in action. We're going to look at some forward looking technology. So I need to ask that you make your purchasing decisions off of products and services that are readily available today. But first, I want to thank all of you in the room. Thank you for attending Dreamforce. Thank you for being our customer. I truly believe that it is your feedback and your input that shapes our products and makes the company that we have today. So please keep that feedback coming, whether it's after this session or throughout Dreamforce. So for those of you that don't know me, my name is Krithika and I'm a product marketer focused on our sales cloud AI capabilities. I'm joined by two brilliant product experts here who are at the forefront of our cutting edge agentforce technology. Sean Keene, who's building Agent Force SDR, and Chelsea Smith, who's building agent force sales coach. So this morning and throughout Dreamforce, you've heard us talk a lot about Agent Force. Today we're going to talk about agent force as it relates to sales. For those of you that aren't familiar with sales cloud, let me introduce you to what we call the sales cloud fan. At the core, or the foundation of this fan is a lot of our core CRM capabilities that you trust and know. And every blade of this fan represents capabilities that we've built into the CRM to give you a complete growth platform from pipeline to paycheck. So these are capabilities that help you prospect, that help you collaborate with your team, that help you analyze your sales data all the way to billing your customer. And AI is woven into every blade of this fan to make your teams more productive. But we're at an inflection point right now with AI where we're moving from a productivity revolution to a workforce revolution. If we look at the last ten years when we started this journey at Salesforce, all the AI that we've built is about assisting individual sellers. It all started with predictive intelligence, where Einstein helped you predict deal outcomes, helped you understand where your forecast might land. All these predictions helped our sellers make smarter decisions. We're now entering the world, or, sorry, before that. Actually, I should go back and talk about generative AI because we took it one step further after productive intelligence with generative AI. And generative AI didn't just recommend the next step for a seller. But instead, it helps sellers take actions. And our generative AI capabilities help sellers automate account research, generate emails on demand, and summarize records. So this was AI that helped you sell faster. Now the exciting stuff is all about autonomous AI. That's the new era that we're approaching. It's no longer about assisting an individual seller, but instead about augmenting an entire workforce or an entire organization. Autonomous AI agents, they scale your sales teams because they do tasks for you, like booking meetings for your reps or conducting role plays with your reps for your managers. The future will be humans with agents working together to unlock new levels of sales success. So I get to introduce to you today two sales specific agents that we are launching in October. Agent Force SDR. That's going to maximize pipeline by nurturing inbound leads. Twenty four seven and agentforce sales coach. That's going to allow you to give every rep a dedicated coach to make them your best rep. So before we dive into these agents, let's talk about the five attributes that make up an agent force agent. The first is a role. Every agent has a goal or an outcome that they're trying to achieve. In our case, for our sales agents, they're trying to nurture pipeline or coach your reps. And the way your agent does this is through data similar to how humans we use the knowledge in our brain to achieve our roles or our actions. An agent uses the data in CRM, um, to make their decisions. And as they're making these decisions, they're acting. These are the actions or the capabilities that an agent does, whether that's booking meetings, conducting role plays, providing feedback. And they take these actions within the guard rails that you set for them. These are the rules in which how you tell this agent to operate based on your business practices and agents interact with your employees and your customers, wherever they are, whether that's in the CRM, email, sms or elsewhere. And every agent interaction goes through the Einstein Trust layer for ultimate trust and security. So keep these five principles in mind as ah, Sean walks you through agent force SDR.

Speaker B **00:05:25**

Excellent. Thank you, Krithika. And I want to note that one challenge that sales organizations can have is after a successful marketing campaign or after successful events like Dreamforce here today, that it can be difficult to keep up with the volume of leads. And that's where agent force can help. Agent force SDR partnered with the human sellers. The idea is that agent force can automate many of those top of funnel activities, help to qualify the leads, progress the deal, and then pass off to the humans in the right moment. This is where we get to see the roi of AI. And I'd like to jump into a demo of this. And I will note, I want to do something a little bit different here because a lot of times when we demo, we like to show the end product what the end user uses. But today I'm going to start out with the setup and you'll see, as product managers, we normally don't demonstrate setup because that's not as fun. But you're going to learn a lot about how agent force works from how it's configured. So you see here, I'm setting up agentforce. I've got two options, my SDR and my sales coach. In this case, I'm going to jump into my SDR and four steps for activation. The first one, there's a variety of different features that need to be on in order for Agent force SDR to work. Now, in the past, we might have told you, like, go to all these different places to turn those options on. We're going to make it simple. We're just going to say enable all to save you all those additional clicks. Now, next, I'm going to configure the agent itself. I start out by creating a user record that the agent is going to be associated to. So let me go ahead and do that. And the reason that I do that is because I get all the benefits of there being a user record tied to this agent in terms of analytics and monitoring the use of the agent, as well as being able to audit what's happening. So you will also notice that I have the ability to assign a manager to an agent. Now, uh, the manager becomes responsible for a couple things. Manager is responsible for training the agent, which I'll show in a few moments, as well as monitoring the usage and the output of the agent. Now, before I move to my next step, I'm going to have a little fun here. Let's select an avatar and make it look like zig zebra. And that will be my agent. Now, here's where I'm defining some of the rules. And the guard rails around the agent, how it's going to operate, my language. This agent's going to operate in English. It's going to use more of a casual tone. Then I set my rules of engagement to say, this is when the agent reaches out. This is how many times they'll reach out to a prospect. I'll set up the topics. This again goes to the idea Krithika was talking about, guardrails this helps define what the agent will have a conversation about versus what m if it's not on this list that they'll punt over to a human seller. And then finally lead assignment where I'm defining the parameters around what leads will be covered by this agent. So I'm going to go ahead and use these defaults. And then finally I've got to give the agent some knowledge. And Krithika talked about the five different columns, and one of them was knowledge. And you had made reference to the knowledge from the CRM, which makes these agents powerful. But when you hire a new seller, you're not saying, hey, learn everything you need to know inside of the CRM. You're bringing in external sources as well. You're bringing in assets, materials, slide decks, et cetera. So you can do the exact same thing with Agent force SDR, where in this case, just as an example, I'm going to say give the agent, uh, the pricing deck or pricing PDF, as well as some case studies. And this could be as much or as little as you want to. But remember, the more knowledge you arm the agent with, the better it's going to be at handling conversations. Moving on. It's ready to roll. So I'm going to switch gears here and I want to jump into the runtime. What actually happens when it's engaging with the prospect? And on this screen, you'll see left hand side of the screen, you're kind of seeing the workflow in terms of where the agent's at. That's kind of our wayfinding. And then the right side of the screen, you're seeing what the prospect will see. And we start out, the agent knows how to reach out to this prospect. Hey, you downloaded this ebook. Check out this demo video. And would you be interested in setting up a meeting with Heather, who's our human sales rep? And you'll notice I've got the signature at the bottom sent by Heather Cartino's AI agent. That is super important because our goal here isn't for these agents to personalize humans. The goal is for these agents to augment the work of the humans, work with them, and in order to maintain the trust of the prospects, we want to be clear, hey, you're working with an agent here, so reach out to Simon. Don't get any response. What ends up happening is the agent knows. Hey, it's time to follow up with simon. Within my rules. Three days nudges Simon again. Would you be interested in connecting with Heather? Simon comes back. How much does your solution cost? Now, we set guardrails for this agent to say, hey, hey, don't give out a pricing guide. When pricing comes up, talk about packaging. So the agent comes back, says, hey, here are the different editions of the product. Do you want to talk to Heather in order to have a deeper dive conversation? You might see a theme here in terms of what job the agent is trying to do next. We get an objection, hey, do you have a free trial? All your competitors do. Well, the answer is no. But there's a way to handle this objection, which is to say, hey, we don't have a trial, but there are other ways to go. Hands on. You know who can tell you about that is Heather. Would you be interested in setting up a meeting with Heather? And finally, Simon bites and says, yes, I would like to set up a meeting with Heather. And the agent can provide some of Heather's availability. And when Simon selects a date and a time, the agent books the meeting, sends a meeting invite to Simon and to Heather, gets it on their calendars, and doesn't end here. Behind the scenes, Heather gets a notification that says, hey, a new meeting has been scheduled, and the agent does a clean handoff of this conversation. So what the agent is doing is saying, not saying, hey, look at this email thread. Figure out what this is all about. The agent is giving a quick summary of what was talked about, a proposed agenda, as well as highlights in terms of any objections or challenges that may come up in the conversation. So Heather can briefly read that and jump in that conversation, prepared to move the deal forward. Now, we talked a few moments ago about the different channels that you're going to see agents work in. Here's an example I just want to show that works inside of SMS as well and works the same way. I've got my initial outreach in SMS. I've got a question that comes up. The agent can answer the question and nudge towards setting up a meeting with Heather. And then maybe the prospect comes back and says, hey, don't message me anymore. Which isn't the outcome we want, but it happens from time to time. And I point this one out because I want to note, remember, this isn't a bot. This is an autonomous agent. We've all seen bots where it's like text stop to stop receiving messages. That's not what this is. The agent understands natural language, understands that this person doesn't want to receive any more messages, and honors that request. This is great. If you ever want to engage again, hit us up on this SMS channel, really simple. And then finally, I could switch gears and talk about WhatsApp outreach. And again, this is illustrating the idea that agents can work across different channels. And one advantage an agent has is it doesn't have to work one lead at a time. An agent can multitask and an agent can work across multiple channels simultaneously. You will also notice that this is in Spanish. And I want to note that this wasn't, we didn't say, okay, we've trained this agent in English. Now let's train it to have spanish language conversations. You train your agent one time and the agent is multilingual so it can be deployed across different languages without you needing to say, okay, let me get my french language materials to train this agent. So again, it has some flexibility that human sellers might not have that can again, augment the efforts of the sales team. Now, again, to recap, what we saw here was the setup of agent force defining the parameters of how the agent will work. And we saw multiple channels, we saw how the agent worked inside of email, inside of SMS, and inside of WhatsApp. Now let's talk about agents actually interacting with your sales team. And for that, I'd like to pass it over to Chelsea.

Speaker C **00:14:01**

Thank you, Sean. What a great demo. Yes. Hi, everyone. I am Chelsea Smith. She and her is a senior product manager on sales cloud and excited to be talking with you today about the world's first sales coach, powered by CRM. Now, at Salesforce, we believe every seller needs a dedicated coach. With agent four, sales coach, they're going to augment the coaching workload of sales managers, supporting every rep on every active deal, providing personalized guidance to build that seller confidence. And coach does this again and again, consistently in a non judgmental way. Coaching at ah scale. Now, uh, let's go ahead and take a look at coach in action. Now, shawn showed us how you can get started with your agents with clicks, not code. So we've rolled our admin has rolled out sales coach into our now, I'm Marianne. I'm a seller working on a deal for Pacifica. Uh, and right here, prominently, I can see my coach on my opportunity record. Now, this coach is always on, always available, and perhaps most importantly, always up to speed on, um, what's going on with my deals. Thanks to the CRM data, coach sees that this deal is in the discovery stage and gives me an opportunity to practice my pitch and get feedback. So let's get started. Coach sets me up for success, giving me some best practices when it comes to doing a pitch at this stage in the deal cycle. I get my notes together and get started. Now this is super simple. I'm right here using my microphone, my camera, no third party tools required and I'm going to record my pitch. Now, I know during discovery that it's key to articulate the customer's problems and how my product is going to solve them and how I'm going to do that better than my competitor. Now at the end of my pitch, I'm able to rewatch what I've captured, do another take or go ahead and provide it to coach for feedback. Now. This is awesome. I hope you're watching. Coach is taking the pitch. I just completed the richness of my opportunity data in CRM. A prompt that we have provided out of the box and with the help of LLM is generating this feedback just for me. Coach provides me a deal. Summary feedback on my pitch areas that need attention and next steps. Now needs attention is interesting. Coach is actually looking at my activity timeline on my opportunity and letting me know, hey, you're behind on a couple tasks. Let's get back up to speed. And next steps are intended to be very actionable. Knowing where I'm at in this deal cycle and what the next stage is, coach is looking closely at what I've identified as the next step on my opportunity record and evaluates and gives me feedback. Is it well defined? Is it appropriate at this stage in the deal? Well, I've got some really great next steps here on this deal. Now fast forward and I'm in the negotiation stage and have a call coming up with my customer. Coach has been, uh, there with me every step of the way on this deal and knows that the best way for me to prepare for negotiation is to practice a negotiation. So I'm going to do a role play with my coach. Now, again, coach sets me up for success with some tips and best practices on how to do an effective negotiation. And we get started. Now, in this interaction, coach is playing the part of my buyer. They're going to ask me questions and make objections just like my buyer might. They're going to ask me, can I offer a discount? Can I improve any deals of the term? Uh, excuse me, any, uh, can I improve any terms on this deal? Right. And all of this is happening as a conversation. I am speaking into my machine and my coach is talking back to me. All right, that was a great role play. Now again, coach is going to give me feedback on how that session went. So it's taking the role play. I just conducted the latest CRM data about my deal prompt shipped out of the box and again with a large language model generating this feedback. Now you can see I have a couple new sections. Overall impression of how the conversation went, specifically what went well, some growth opportunities, and the all important next steps. All right, well, my coach is a tough negotiator, but I am feeling confident going into my customer call, and I don't go it alone. As you can see, sales coach has joined me and is actively listening to my conversation with my customer. Over on the right, coach is on the sidelines, giving me real time insights in how I can respond to things that are coming up during this call. How could I handle that competitor mention or tips on the negotiation that we just practiced in our role play? All right, I'm feeling really great coming out of that call with my customer. I feel confident I'm going to be able to close this deal. Now, you've just seen how coach has been there with me every step of the way, providing me hyper contextual, personalized feedback to help me build momentum and move this deal forward. So you've just seen two amazing sales agents in action. Our agents are effective because they are supported by the world's number one sales platform. And with our atlas engine that handles the complex reasoning of these agents, we know with confidence our agent behavior is grounded in truth. We empower customers with no code or low code experiences to configure their agents and achieve, uh, deep customization. And with monitoring and auditing of agent activities, customers have a crystal clear picture of the work that the agents are doing on their behalf. And all of this is integrated with existing systems of action that your sales teams live and breathe in. This is a slide. Well, on behalf of Krithika, Shawn, and myself, I want to thank you for joining us today and seeing this, uh, sales agents in action.

And quickly, to close this out, um, right across the hall, we are giving out zig plushies. Zig is our mascot on sales cloud. So if you scan this QR code, there are two ways to win a zig. One is to become a sales blazer. Another is to leave us a review on G two. And then across the hall in the sales lodge, you can claim your zig. So I'll let everyone do that QR code, and then the last plug that's on the next slide. But I know everyone's still doing the QR code. Please attend the sales cloud keynote tomorrow at 01:00 p.m. to hear all of our latest innovations. And then tomorrow at 315 pm, there's a great session about hearing our salesforce plans on how we are going to use agent force. It's our lead of it, our lead of sales strategy, and they're going to be talking about how we are going to use agent force internally for our sales teams. Thank you.