

# SMB and Growth Keynote: Scale Faster with Connected Data

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## Speakers:

Speaker A - 15.51%

Speaker B - 12.62%

Speaker C - 10.81%

Speaker D - 12.22%

Speaker E - 10.63%

Speaker F - 6.25%

Speaker G - 13.85%

Speaker H - 7.14%

Speaker I - 6.0%

Speaker J - 4.99%

## Notes:

- The admin keynote spotlight to keep the keynote celebration going, I am joined by the amazing Ella Marks and Jennifer Lee. Concert was ripping. A lot of our friends showed up bright and early to hang out with us. We have a packed agenda today.
- Today you can ask your AE to get you Salesforce foundations. It's a free upgrade for sales, service, marketing, commerce and data cloud. Coming in October, agent force and agents, I'm really excited about this.
- Sales cloud is a complete growth platform that allows small and medium sized businesses to run their entire sales process from pipeline to paycheck. With AI incorporated in the entire selling process, you're selling smarter and closing more deals. It's working for small businesses.
- Salesforce channels and Slack AI helped boost collaboration for different teams. We saw a sales development agent engaging autonomously with a prospect to open a new opportunity. Sam, talk to us a little bit about what service leaders are experiencing today in SMB.
- Customer service is not just a retention lever, it's a growth driver for your business. Service cloud gives you the ability to do self service where your customers can find answers on their own. Having an organization where all teams are aligned around growth is a competitive advantage for every organization.
- Agentforce helps you extend your workforce by building AI agents that work together with humans to drive customer success. You have a chance to win one of five passes for Dreamforce 2025. Follow the QR code on screen and fill out our event survey as a thank you.

**Speaker A** **00:00:00**

The admin keynote spotlight to keep the keynote celebration going, I am joined by the amazing Ella Marks and Jennifer Lee.

**Speaker B** **00:00:07**

Of EVP Amer SMB sales salesforce Adam.

**Speaker C** **00:00:12**

Of SVP sales sales force Whitney Hillier.

**Speaker A** **00:00:17**

Good morning.

Good morning. How we feeling?

**Speaker B**

**00:00:21**

We are feeling great this morning. We are pumped up to be here.

**Speaker D**

**00:00:25**

Uh, day of dreamforce.

**Speaker B**

**00:00:28**

I know I had energy. I had to have an extra cup of coffee. This morning was a little bit of a late night last night with the concert, but it was awesome.

**Speaker D**

**00:00:35**

Concert was ripping. I had a blast. And you see, a lot of our friends showed up bright and early to hang out with us. We have a packed agenda today. We're going to cover a lot of terrain. What, uh, are you looking forward to in this presentation?

**Speaker B**

**00:00:44**

I am so excited that we're bringing this keynote back and that we get to spend the next hour with our small and growing companies. We spent a lot of time this week listening to enterprise customers like Sakshe talk about how they use the salesforce technology. But we know that not everybody has the scale and resources of a company like Saks. And so I'm just excited to hear from some of our smaller and scaling companies this morning.

**Speaker D**

**00:01:04**

Take all that goodness and really translate it to our SMB customers. Of course I can spend time with you and the team, but most importantly, I'm looking forward to doing the thing that we have to do at this time, which is say a huge thank you to our customers, our partners, our employees. It's been a long week, right? Hopefully it's been a great week. Hopefully you're inspired and excited and ready to dive into agent force to transform your business and execute. But most of all, it's a lot of time to spend with us. We know your time's precious and we're thrilled you spent it with us. Now, this is a growth keynote, right? Help us understand who's in the room today.

**Speaker B**

**00:01:37**

There are so many great and frankly different companies in the room today. We have VC's like eleven labs, we have sports franchises, we have community banks and community health centers. We have tech entrepreneurs in this room that are out there building the next tech unicorn. And we have so many scaling services companies. In fact, you might be

surprised to know that actually 70% of Salesforce customers fall in the growth business category. And it's just awesome that we get to bring them together today because this group of companies is facing such a unique and challenging landscape.

### **Speaker D**

**00:02:09**

Uh, all of you in the room, you're the ones pacing our innovation. You're pushing the envelope, you're driving the economy forward. What you all have in common is you're all trying to grow. What you also have in common is the landscape continues to change so rapidly. You look at the socioeconomic impacts over the last four or five years. Covid hit. We're going to talk to Dan from Petaluma Creamer. He had to totally change his business into a digital business during COVID. Then we had this steep recovery into supply chain issues, right? All the way into persistent inflation. We got a rate drop yesterday, and now we have an election coming up in the US. It doesn't end. And on top of all those socioeconomic impacts, workforces are changing. Whitney, you and I and everyone else in the room, we're hiring xenial workers. They're digital natives. They have a totally different way of working and communicating. And look, I don't want to call a call center to change a flight or book a car appointment. We're all expecting hyper personalized service and customer expectations change. And on top of all that, now there's AI. And the possibilities are really endless with how we can automate many of these tasks and change the way we're executing. But of course, it's also changing a lot of the prioritization of these companies, isn't it?

### **Speaker B**

**00:03:10**

Yeah, absolutely. I mean, you and I and our teams, we speak to you guys every day and customers like you, we're hearing the same themes over and over. The first and maybe the most, is that we're hearing that everyone is being asked to do more with less, regardless of scale or size or even role. And I think that's especially true with the inflationary pressure that's going on right now. And second, like, everyone is trying to consolidate their tech stacks. Like, people are so tired of stitching together niche solutions with custom code that turn into tons of tech debt, especially when you get to that hyper growth scale and the band aids that it takes to fix that. We're hearing that your customers are asking, well, maybe demanding is a better word, a personalized experience. At every step of the journey. They're asking to, like, talk to less people and make sure that every interaction is personalized to them. And like, we all innately understand this. We know that we spend more money when we are given personalized recommendations. I want to be able to start a shopping journey on one device and finish it on another device without getting a weird, cryptic email that's like, did you check out yet? And I have to like, think, like, did I actually check out? Or that might just be a me problem.

### **Speaker D**

**00:04:21**

I mean, I think in the Alfan house we're really trying to cut down on the online shopping, but I think you're right about it.

**Speaker B**

**00:04:25**

My house too. My house too. My house too. And as we've been talking all week, like AI and data sits underneath all of this. In fact, we recently partnered with Ink magazine and the results came back that 91% of people are optimistic about AI's potential and they have to be right, because we need AI. We need AI in this segment more than ever. We need AI to help us do more with less. We need AI to help us personalize these customer journeys.

**Speaker D**

**00:04:51**

Yeah, but Whitney, you just train a model, right? You take a model, you train it, you throw it in. It's really easy, no problem, off you go. AI solves all the problems. Is that what I'm hearing?

**Speaker B**

**00:04:58**

Yeah, you know, ah, it's a little bit easier said than done. Um, AI feels like it's changing by the hour. I mean, how many new things have come out since like Monday? Right? Um, and things like security employee onboarding the cultural revolution that's going to have to happen with inside of these companies to gain adoption in AI is incredible. And customers are nervous. They're nervous that they don't have the data sets, that they don't have the platforms, that they don't have the infrastructure and technology to take advantage of all that AI has to offer.

**Speaker D**

**00:05:30**

Incredible opportunity. But safeguarding your customers data driving processes, driving organizational change, all of it takes a lot of thought and contemplation and it isn't easy. It's a great solution though. Stop me if you've heard this one. All right, agent force going to allow you to take all of the data and existing processes you have in Salesforce. Create agentic experiences that are secure, that are fast, that are easy, using natural language. It's absolutely incredible. We could sit here all day and spin yarn about this, but don't take it from us. Whitney, let's bring up a customer that's already executing on some of their AI journey.

**Speaker E**

**00:06:04**

Let's do it.

**Speaker D**

**00:06:05**

All right, Dan, come on up. Welcome, um, Dan Peters from Petaluma Creamery. Great to

see you, man. Dan's an incredible part of the salesforce community. He's also brought some gifts today. Tell us a little bit about what the audience has won for showing up. Right, and early after the concert.

**Speaker F**

**00:06:21**

So we've got petaluma creamery cheese right out here, right outside the keynote room. It's some of the best cheese you'll ever taste. And my cousin, the owner Larry, Peter here, he's uh, the owner of the creamery. He's going to be out there serving it and he can tell you more about uh, himself, the company, the cheese, all of that. I wish I had time to tell all that right now, but I know we just have a brief moment here.

**Speaker D**

**00:06:43**

Well, look, I appreciate you coming. We appreciate the gifts. It means a lot. I know the cheese will be consumed really quickly after. I also know you're consuming AI to drive your business forward and doing some really interesting things with the way you're engaging customers. Can you tell us a little bit about that journey and what you've executed?

**Speaker F**

**00:06:57**

Yeah, so like you already touched on, small, uh, and medium businesses have been hit hard through the pandemic. We're all trying to do more with less. And uh, you know, the petaluma creamery is really a prime example of that. Um, so uh, there's, it used to have, you know, 100 plus employees and uh, we don't have much more than my cousin and myself right now, if you can believe it. And we've got customers uh, emailing, texting in with service requests, sales requests and we have to pick up the phone and handle those or you know, type the emails. This is stuff that generative AI can easily handle for us now. And uh, the other thing, um, we're using generative AI to kind of predict orders. So uh, folks order somewhat regularly and there's some outliers in there. Well, generative AI can actually do a pretty good job of looking at those and telling you what combination of cheeses butter on what day is uh, this customer probably going to want. So we can prepare the orders ahead of time for production or just for uh, putting them on the truck to get them to the customer. We don't have to call them, chase them down, ask them what they want anymore. Yeah, and I can't wait to get on uh, with asian force. I can't do it fast enough because I'm having to do these things myself. I'm swivel sharing between developer writing code on Salesforce to then taking a customer's order just to kind of keep the lights on. So I think it's something probably resonates with a lot of small businesses. They're wearing a lot of hats. They need agent for it so they can focus on what's more important and let the technology focus on those more transactional, you could say mundane tasks that are consuming everybody's time.

**Speaker D**

**00:08:35**

Well, it's incredible innovation. Look, I think everyone in the room, everyone I've talked to this week, probably has some energy to get started and start to use these tools. I've seen some of your demos, they're very progressive, but what advice would you have? I know this is probably a long question, but give us the short answer on how people should get started. What would you tell a business that really wants to start driving their AI journey?

**Speaker F**

**00:08:52**

Well, that's the beauty of where we're at in technology right now. It is easy even for small business. Uh, this is very approachable tech, which we've never seen before. It's usually these kinds of tools are only available to large enterprise, but how many platforms are there where you can actually start as a small business and grow it all the way up to a large enterprise on the same platform? So you can actually get in there declaratively and start building these things? You know, we've got trailhead and yeah, you might need to write some code. Um, you might have to either learn to code a bit or hire a developer. I know not all SMBs can afford to have a full time developer on.

**Speaker D**

**00:09:28**

Or they just call you, right?

**Speaker F**

**00:09:30**

Yeah, that's the beauty of, uh, what I'm doing. Uh, we kind of got lucky at the creamery because I can wear the developer hat also, but it's much easier. It's so easy now. I think that's the tipping point that we've hit.

**Speaker D**

**00:09:41**

Well, huge thanks to you for the gifts you brought, for the advice you brought, and for all you do with the platform. Daniel, it's great to see you, man.

**Speaker F**

**00:09:47**

Thank you, Adam.

**Speaker D**

**00:09:48**

Much appreciated. Great advice, great advice. Right? You gotta get started. I mean, I think that's, that's the key theme to this week. And one way we're helping you get started with a broader translation of our platforms is Salesforce foundations for those that use sales cloud. Now you have access to service cloud marketing, cloud commerce, data cloud and others. And it's largely thanks to the man I'm gonna introduce now, Chris Billmeyer, who's gonna take you through this incredible innovation. Chris, come on up, man.

Thank you, Adam. Thank you, Adam. Thank you all for being here today. Uh, I'm just thrilled to get out here and talk to you and I'm also thrilled for cheese afterwards. So I'm really excited. Um, I'm Chris Billmeyer, I'm the SVP and GM of our self service and growth business here at salesforce. And Adam stole my joke. But really what's exciting about what we're doing with agent force is bringing data AI, uh, and the customer 360 altogether. Now what I really get a kick out of is I get to talk to a ton of customers across all different scopes, from enterprises to small businesses who have growth in mind. And the thing I get asked all the time that's consistent is how do I get great AI? How do I get to a point where my AI is not having hallucinations? How do I get to a point where I'm ready to go with AI? And my answer to all of them is great AI starts with great data and great data starts with our applications. And the Salesforce applications are second to none. And you see this kind of three half moon diagram we have here. This is really the foundation for agent force data, the customer 360 and agent force. And we know that unified data is the foundation for business growth. Right? As your foundation grows, your apps interact better and smoother together. You end up with faster sellers, you end up with smarter commerce, you end up with targeted marketing, and ultimately you end up with happier customers. But we know getting there is not easy. It is not easy to go from a sales or service cloud only to the full customer. 360 requires budget, it requires time, it requires resources, and it's not always easy for everyone. So my team has been working really hard on making it easier. I want to tell you a little bit more about that. So today a lot of your works probably look like this sales cloud or service cloud. It's one, um, product in one part of your organization. But what if we could make it super simple to turn this enterprise.org into a multi cloud by default? And that's why I'm so excited that we've announced Salesforce foundations this week. Salesforce Foundations is a free upgrade available to all enterprise customers and above that brings together sales, service, marketing, commerce and data cloud all by default. It's a simple add on. Customers like eleven labs signed up for it this week. Eleven labs in the room here somewhere, I think, hopefully. Um, but it took five minutes for them to get in touch with their ae, sign a zero dollar order form and get access to all this great tooling. You could start building your customer 360 today and you can get ready for agents because what's exciting, this is all available now, but coming in October, we're actually going to provide you agents and agent force and get your first thousand conversations going for free so that you can not only craft your entire customer 360, but you can become AI ready and start using AI. So yeah, that's pretty awesome, right? I'm sure most of you are used to signing an order form with us before you get to try all of the products that we have, right? We've changed that. You can get access to all these products. It's never been easier. So you're going to go from looking like this to like this with Salesforce foundations. We're going to show you a live demo in a moment. This is a single pane of glass with access to all of your applications and data cloud running by default, harmonizing and unifying profiles. This is a massive shift for Salesforce and a massive improvement for you, the customer. And we're not doing this alone. Our partners are coming with us. They're extending the power of the platform through access to free enterprise, uh, applications tied to Salesforce foundations. We have over 25 partners who



are extending the power of the platform with foundations. That's incredible. Um, but enough of that. We've talked a lot about it. I want to jump into a demo right now and let's show you how it works. So this is going to look a little different. This is a live demo, this is an enterprise edition. And the first thing you notice is on the left hand nav. All of your sales, service, marketing, commerce, applications and data cloud are all there, simply available for you. We have a home experience that brings together the customer 360 easily by default. Let's jump in and look at a contact. So this looks a little bit different too, right? Because we're bringing the customer 360 together. Not only do you have the contact and all the information about the contact, but we have campaign history associated with the contact. We have cases. This really brings me the customer 360 by default which is the grounding on which to provide agent force. So let's jump into an opportunity with commerce cloud now included in Salesforce foundations, this opportunity that's ready to buy, well I can just send them a secure payment link so they can transact seamlessly and quickly and I can get paid quickly as a customer. All right, now this opportunity looks like it's ready to be added to a campaign. And what's great about foundations is we include data cloud and marketing cloud so that you can go ahead and send beautifully branded marketing campaigns out of the box by default. All you have to do is leverage our uh, segmentation tool that's powered by Datacloud. Create your content for marketing and you're on your way to sending with Einstein. Send time optimization. Now this is all great. I'm ready to close more deals, I'm ready to close more business, but what if I have a case that's blocking some of this? Well that's okay, because I can see it right here. Every employee that you have now has access to the customer 360 of data so they can take their own cut and learn and understand what is going on with an opportunity, what might need to be uh, taken care of before I can actually close. And in this case I can see that the case is being worked and I'm ready to go ahead and close more business. Now the last thing I want to talk about in foundations is access to your digital storefront. So with commerce cloud now available in Salesforce foundations, you can build your first digital storefront and start selling online quickly and easily. This is pretty amazing. We started with Salesforce starter and Salesforce pro suites and built out these easy to use, simple experience that are incredibly powerful and easy to get started with. And we've now brought those to the enterprise as well. So let's jump back into the slides. Like I said, foundations is the foundation for agent force. I had one customer, I saw a tweet yesterday, it was great. Said I just started with agent force. Took me five minutes to get up and running and now I'm building out my customer 360 and I'm ready to go. So today you can ask your AE to get you Salesforce foundations. It's a free upgrade for sales, service, marketing, commerce and data cloud. And again coming in October, agent force and agents, I'm really excited about this. I hope you are as well. Thank you all very much for your time. Back to you, Adam.

## **Speaker D**

**00:17:53**

I mean, just incredible innovation. I'm really excited too, Chris. Making it easier to unlock

the platform for everyone in the room. I would call your account executive. I'd get started. I'd get moving on foundations and start driving all this innovation. So we covered a lot of terrain there and we showed you the full breadth of the platform. But now it's time to go a little bit deeper. We want to take a closer look at sales and service and how we're using agent force to drive outcomes. And with that I'm going to invite Samron Duvetti, SVP Solutions Engineering. Sam, welcome up.

## **Speaker C**

**00:18:21**

Thanks, Adam. All right, good morning everybody. I hope you're having an amazing dreamforce. How was the concert last night? Yes, yes, it was an amazing concert. I'm Chris. Great job on the demo, showing our customers how they can get started at a foundational level with sales, service, marketing and commerce. Now I'm excited to walk you through how we take it to the next level with sales and service cloud. Now I'm very lucky that I've been able to spend a lot of time with service, uh, sales leaders all across the globe. And the thing that I hear all the time from all of them is they're under a lot of pressure to drive growth. I'm sure a lot of you are as well. And not just any growth, but high margin sustainable growth. Now, what are the levers they're looking at pulling to drive? It starts with finding new customers, filling the top of the funnel and finding them in different ways. Whether it be through, uh, generating more leads, whether it be selling new products, new services, starting a channel, sales team, whatever it takes, that's the goal. Secondly, it's to retain current customers, and not just retain them, but cross sell and upsell into the current install base. And finally, it is to improve stellar productivity, to make every rep on the team as productive as the best rep on the team, by giving them simple yet powerful tools so they can do their job better. Now, all this is easier said than done, as all of you know. First off, and raise your hand if you feel this, there's tight budgets everywhere. Yes, there's tight budgets, not just with customers, which is causing deals to take longer. And when they do close, they're much smaller. But also internally, you're not getting the investments you need to invest in technology to drive productivity, and you're not getting the investments for headcount. In fact, hiring has come to a screeching halt. No longer can sales leaders rely on just hiring sales reps to drive top line growth. So everybody is turning to technology, especially AI. I'm sure you heard a lot about AI in agent force this week, but customers don't know where to get started. And while you wait to figure this out, competition continues to heat up. And this is where sales cloud comes in. Sales cloud is a complete growth platform that allows small and medium sized businesses to run their entire sales process from pipeline to paycheck. And the way it does that is, first, it gives you a complete view of your customer and your entire business in one place. There's no more swivel chairing into different systems to get the information you need. And your sales reps are, uh, spending time in the most productive activities. Secondly, with automated prospecting, you're finding more prospects, filling the top of the funnel and closing them faster. And with AI incorporated in the entire selling process, you're selling smarter and closing more deals. And the best news is, it's working. It's

working for small businesses. In fact, a small business, our own small business, Boca Systems, is seeing two x increase in sales productivity since they launched sales cloud. Now, who's waiting to see a demo? All right, please introduce Sarah Grace on stage to walk us through a sales cloud demo. Sarah Grace, take it away.

## **Speaker A**

**00:21:34**

Today our demonstrations are going to follow Cirrus Solar. They're a small business that sells solar panel technologies to both consumers and businesses. How we doing at the demo booth, ladies? All right, perfect. Let's dive in. So our story starts when a b two b customer downloads the marketing content online. From there, a, uh, sales development agent takes the conversation away. This is completely hands free for my selling team. The agent can go back and forth with the prospect and understand that there's actually an opportunity to expand a partnership with one of Siris current customers. Now, as a seller, this is saving me and my team valuable time and energy and the agents even booking next steps so that I'll have a call on my calendar to discuss pricing on this opportunity. Now, logging into Salesforce in my seller home, agent force is showing me everything that I need to see to have a productive day. I can get open tasks and to dos details on opportunities that I might be working and information about the meeting that that agent just booked for me. Now, once we've had our pricing call for this opportunity, it's time to start building our proposal. Gone are the days where you have to rewatch an hour long call. Try to remember what people were talking about, dig through different notes. Salesforce is providing me with a transcript and a call summary. So my team is up to speed within minutes to start building this compelling proposal. Now before I put my final touches on the proposal, I want to make sure there are no outstanding issues, objections that might slow this deal down. And if you'll remember, when Chris showed us Salesforce foundations, we're talking about bringing the power of service to sales and creating that true customer 360. So Agentforce actually helps me understand that there are some damaged panels on one of this customer's current locations that need to be repaired before they feel comfortable moving forward. So as a sales rep, uh, the first thing that I think when I hear that is we got to get in touch with service and make sure we get this taken care of. So I head over to the Salesforce channel here I have all of the information about the account conversations my team has been collaborating on. And instead of digging through these previous messages, Slack AI can actually summarize the last seven days of conversation for me, this makes it really easy for me to understand. There's actually already an open support ticket. The service team is on the job. They're going to work on getting a technician dispatched to go get those panels fixed. Now, before we hop into that workflow and talk a little bit about what service and agent force are going to be doing for small businesses like yourself, let's recap what we just saw. We saw a sales development agent engaging autonomously with a prospect to open a new opportunity. We saw conversation, insights and agent force helping with sales rep productivity. And we saw how Salesforce channels and Slack AI helped boost collaboration for different teams.

All right, let's dive into service. Sam, talk to me a little bit about what service leaders are experiencing today in SMB.

## **Speaker C**

**00:24:29**

Great demo. All right, I now I'm really excited to talk to you about customer service because customer service is not just a retention lever, it's a growth driver for your business. In fact, similar to sales leaders, in our conversation with service leaders, they are focused, they have the similar challenges. And their key focus areas are, number one, enhancing customer experience. This is the one thing we hear from almost every service leader. With the shifts in technology and automation, customers are expecting personalized journeys across every channel and during any time of their journey with you. And for that reason, teams have to be super efficient. And everybody at a small business cares about growth, including customer service teams. In fact, having an organization where all teams are aligned around growth is a competitive advantage for every organization. Now, service is an opportunity to differentiate, but there's many challenges, as a lot of you know. Number one, insufficient tools. You cannot run top class surveys with insufficient and inadequate tech. And secondly, there's the issue of the overwhelmed. The undertrained service rep who is expected to wear many different hats in a small business, makes it very difficult to train them on an ongoing basis when they're doing so much. And again, small businesses, especially service teams within them, are operating with very limited budgets where there's an expectation that you're always doing more with less. And this is where service cloud comes in. Number one, service cloud gives you the ability to do self service where your customers can find answers on their own, makes it super simple, deflects cases and cut costs. And many times they don't even need to speak to a service rep because they're getting access to agents and a portal, making their experience much better. Secondly, by incorporating service right into the rest of your operations and getting this integrated platform, you're giving your service reps a 360 degree view of your customer so they can better serve the customer, helping you grow the business. And lastly, with having AI incorporated right in the flow of work, you boost productivity by making things easier for the rep, enhancing customer loyalty. And just like sales, cloud service cloud is working for our customers. We did a survey of all the SME customers using service cloud today and we found on an average they see 25% increase in customer service ROI. Now let's watch this in a live demo again and welcome Sarah Grace on stage.

## **Speaker A**

**00:27:01**

All right, cool. So we're going to hop right back into our story if you'll remember that open case about the damaged panels that our sales team was just looking at and see how agent force can help cirrus service team. Now, before this chat ever got to me as a service rep, the customer was actually engaging with an autonomous service agent to help get initial questions answered on their preferred channel, whether that's WhatsApp or the website. This helped take a little workload off of me as the service rep. So when this was escalated

to speak with a live agent, they could come directly to me. And here I am now, as opposed to digging through knowledge articles, customer records, trying to understand what I should be saying back to this customer. My agent Force service assistant is providing me with suggested replies to keep the conversation moving smoothly. This is huge for small businesses who are looking to onboard and hire and get those service reps up to speed and in front of customers as quickly as possible. Now, as I move this conversation along, it becomes time for me to actually schedule the technician to go fix those damaged panels. Gone are the days where you're trying to play calendar Tetris and see when an appointment can be made. Agent force for dispatchers is actually taking into account the optimal times that the customer is available, as well as when internal service resources are available at Cirrus to automatically book this meeting. Now we have our meeting booked. The customer knows that the technician is coming on site and we got to update the sales team. They might need to make some tweaks to this proposal they've been working on. So with case summarization, sales can come to this case and get a quick brief of the dialogue that I've been having with this decision maker. That's the power of bringing service and sales together, which you can do today with foundations. All right, now let's fast forward a little bit. This case is in the hands of the field service team, so let's see how agent force can help us from there. It's the day of the appointment and our technician is dispatched. They get an automatic notification on their phone that includes a brief with a summary of the work order and an optimized route of how to get to this appointment. This really streamlines prep work and also makes sure that no appointments are missed because we know that all of your employees are really busy at y'all small businesses. Now, once the appointment is made and the panels are repaired, our technician can now update agent force on their way out of the office to give a work order summary to the internal teams back at Cirrus. This makes sure they can get to their next appointment as quickly as possible. And the sales and service teams know that this case has been completed. So we have a closed case. We have a happy customer. They're ready to move forward with that proposal that we've been building on the sales team. And it's all due to the power of bringing sales and service together with agent force. Now, everything that you just saw, including the service, uh, agent that helped deflect cases and engage autonomously with the customer and the case summarization, the suggested replies, as well as the agent force for dispatchers, this is all the amazing functionality that's going to help small businesses like yourself continue to grow in scale while also providing that best in class customer experience so that y'all can continue to be amazing and use that small business technology to then grow into an enterprise company, if that is your goal. All right, back over to you, Whitney.

## **Speaker B**

**00:30:22**

Wow. Sarah Grace. The innovation you just showed in sales and service cloud was amazing. Um, but let's spend a little bit of time now talking about marketing and commerce. And there's no better person to do that than our SVP of Emea. Giovanni.

Everybody.

## **Speaker G**

**00:30:42**

Bonjour.

## **Speaker H**

**00:30:43**

Buenos dias, launcha. I can continue like that for a lot, but lots of language to cover. I'm Giovanni, I manage the SME emea. Uh, but we are representing, I'm very glad to be with all of you representing all this fantastic company globally. Right? Because SMB is fantastic, uh, new way of doing the company. It's fantastic to have all of you here. Well, now what we're going to talk today, we're going to talk, as Whitney says, we're going to talk about really the people that bring those customers, really the people that find those customers, the marketing, the commerce and the 9th annual state of report marketing is going to help us a little bit. What is top of mind for you? Well, of course, we've heard the implemented AI technology when we're talking, planted AI technology specifically for you is how we're going to generate this new product description, how I'm going to automate the content, how I'm going to drive real offers in real times, to my customer and prospect. Secondly, expanding the customer, expanding my, my prospect where I'm going to find them, right. In which part of the world in which demographics there are the new customers that I'm going to find. And lastly, what's my impact on the company? What's my impact, uh, around the revenue? Because yes, we are here to increase revenues, right. And uh, which value I'm going to bring to my existing customer or this new one that I just found. Now of course it's not easy, right? We know that that's not easy because we heard this. It is true. It's part of the, what we're going through now and we have to do more with less. We need to scale, of course. And uh, some of the challenges that comes along is the engagement. For example, which data, uh, where are my data? In which part of the application there are that I'm going to be able to engage my customer really on time. Then there is other problems that 41% of CMO that were interviewed have said, okay, I want to build customer loyalty. There is trust there. But uh, this customer loyalty is uh, based on which data they are concerned that Jnai is showing the wrong data, probably. And again, it's the shifts in customer behavior. Like for example, I'm an old person, right? I still like uh, the SMS or like the phone call, but uh, somebody is on Instagram, TikTok and somebody wants to do WhatsApp. So the multichannel is changing the behavioral changing. You need to keep up. Now, Salesforce, I was going to help on that. Salesforce is going to help all along the customer journey, all along this engagement, right from the beginning to the end and even reengage in some of the, we all know the little basket, uh, on top of our website where we want to engage those customers. Chris, show that. Now finally we have to say finally, uh, we get full access to all sales and service customers. We are getting full access again to marketing with the main segmentation, uh, commerce, commerce forefront. So just now it's about the time to finally do it. Now we have an opportunity. The platform is there, we can just do it. The idea is there. Right? So you are the one that to

guide us into the future. Now we have heard agent force, right? Agent force for marketing. You know, we heard about generate your campaign, bring us this idea, uh, make someone else do a duff for you and the agent for woocommerce, as we said, generating all these products and content all along. So now of course, my axe, probably some of you are a little bit lost right? So I'm going to bring all of this all together. Jody, come on board and show us a uh, real demo of what this does.

**Speaker E**

**00:34:05**

Gracie, Gio. All right, I've got one more demo standing between you all and some cheese.

**Speaker G**

**00:34:12**

Emma?

**Speaker E**

**00:34:12**

Um, uh, Madison, are you ready for it? Ok, so let's see how Agent Forest can help marketing and commerce teams do more with less. Now earlier Chris showed us how foundations brings commerce storefronts to all of you today. But let's see what Commerce cloud and agent force for commerce can do to take it to the next level. Commerce cloud has everything an entrepreneur or small business needs to get started selling online, like pricebooks and cms. But let's take a look at merchandising because we're going to go back to Sirius solar. And I at Sirius Solar need to optimize increase sales of my at home solar car charger. And I'm not convinced my current product descriptions are where they need to be to help me reach my sales. So agent force from merchandisers will help me write and optimize these product descriptions so that I can make sure they are clear and concise because solar products can be pretty confusing for new buyers. So agent force can help me streamline this language. I use a conversational prompt and with the click of a button I can even make sure that these descriptions are translated into any language, making my website global ready. So now I have product descriptions that are clear, they're concise, they're even SEO optimized so that I can reach more customers searching for sustainable solutions. Now, once I've got my website ready, I need to make sure customers can come to my website. And this is where agent force for marketing comes in. Agent Force is going to help me create a campaign that I can use to reach customers to get them to come to my website. I give it a few details like my target market, my um, messaging, my goals, and it's going to give me a first pass at a campaign email I can send to my customers. But I want to pause here for a second because who here has ever tried to write email marketing campaign copy promotional copy? It's actually kind of hard. Staring at that blank page is a little stressful. I didn't have to do that. Agent Force got me started. But even autonomous AI agents need a little bit of feedback, so I'm going to give a little bit of feedback and I asked to adjust the tone and once I have this email in a good spot, I can approve it. And now I have an email that is ready to go to send to my customers to get them to come to

my website. But how do I make sure the right customers come to my website? This is where data cloud comes in. Data cloud is going to help me create a segment of high propensity to buy customers that are in market for my at home solar car charger. Now I'm just going to tell it that I want to target new Tesla buyers. Maybe they've bought their car within the last six months and it's going to help to build that segment. But that segment's a little big. I don't know that I have the inventory to support all those customers who might click through. So let's refine the segment again using a conversational prompt. Let's refine the location and see if that helps. Drumroll please. There we go, a much better segment. So now I have an updated website. I have an email campaign that is ready to go to reach my customers and I have the right segment of customers to receive this email. All thanks and help to Agentforce. But let's see now what Agentforce can do for our customers. So Lauren is a customer who was in our target segment. She recently bought a Tesla and she gets our email and it looks like agent Forest chose the right subject line because that is interesting to her. She's going to click through and open up that email. And you know what? She's actually been looking for an at home charger for her Tesla. So she's going to click through to the website and now we have that beautifully updated product descriptions, clear, concise and it tells her that yeah, this is the product that she has been looking for but she has some questions. So she's going to click the chat icon to talk to a chatbot. But this is not a chatbot. This is Agent Force for shoppers. Agent Force knows who she is, knows that she is in our target segment and that she's been looking at this at home solar charger. And so when she has a question about whether this is in stock and can ship to her on time because cirrus Solar is using Agent force not just for storefronts but also for inventory management, the agent can tell her that yes, this product is in stock and it is available to ship to you when you need it. And Agent Force can take action by adding it to her cart and sending her a uh, pay now link so she can check out when she is ready. And that's how you go from a lead to a website visitor to a happy customer for life with the help of Agentforce so what did we just see there? We just saw, uh, how Agent Forest helps merchandisers streamline their merchandising by writing and optimizing product descriptions. We saw how Agentforce helps marketers build their campaigns faster by helping develop emails. And we saw how Agentforce even helped shoppers by providing a personal digital assistant, a uh, digital concierge in their pocket. With that. Back to you, Whitney.

## **Speaker B**

**00:39:15**

Thank you. Jody. Spent a minute, uh, seeing how the salesforce platform is going to be able to help you scale your journey. Let's meet another customer. Please welcome to the stage Kia Cole, the chief digital officer of BSC, the parent company for the Brooklyn Nets, New York Liberty and Barclays center. Kia, welcome.

## **Speaker I**

**00:39:42**

Thanks, Whitney.



Uh, tell us a little bit about yourself and your role at BSE.

**Speaker A**

**00:39:45**

Great.

**Speaker I**

**00:39:46**

So I'm the chief digital officer at BSE Global. Um, I have the opportunity to lead technology, data, cybersecurity, digital across all of our different properties as well as the arena.

**Speaker B**

**00:39:58**

Amazing. Um, and you guys have such an incredibly dynamic and multifaceted business, but it seems like fan experience and building these one to one relationships with your fans is really at the heart of what you guys are trying to accomplish. Can you talk a little bit about how Salesforce helps you do that?

**Speaker I**

**00:40:14**

Yeah, for sure. So, um, we already had what I would say is really deep integration with the teams that sell directly. So think our ticketing team, our partnerships team who are talking to customers every day selling our products. Um, but we had this vision, um, from this awesome team sitting over here, um, around what our full scope of our business meant for managing relationships. And we're a relationship business at its core and really work to bring other areas of the business on board who were managing their contacts and their relationships manually and to use that and use Salesforce for that. Um, so a good example is we have a community team that does youth basketball clinics with elementary schools, um, or middle schools, other areas in the community. And they were managing their contacts on a spreadsheet essentially. Um, but those same schools might also be a buyer for group tickets. So we built a process for them to manage their contacts in Salesforce. And now you have a full view of that customer relationship, um, and then that extends I think to other areas of the customer journey, whether that's our use of marketing, cloud tableau for business intelligence and then slack to communicate as a team.

**Speaker B**

**00:41:30**

That's awesome. Well, we've spent like this whole conference talking about data and AI. Um, so can you tell us a little bit about your data and AI strategy and maybe a little bit about how it's evolved over the last couple months.

**Speaker I**

**00:41:41**

Yeah, no, um, it's a great question. I mean, I think from a data perspective we're trying to do what everybody is trying to do, which is develop a full view of the customer 360. I think

we sometimes joke that maybe it's going to be more like 320, um, but we'll get there. Um, and so making sure that all of our digital touch points and our physical touch points with customers, vendors show up, um, in Salesforce where we had that full view and then from a data perspective, from an AI perspective, we've really been trying to balance the need to move fast with developing the right amount of governance. I, um, think somebody told me a couple of months ago just to go ahead and turn on the things that are in your existing applications. And so we've really been focused on that at the same time that making sure that our data model is ready to take on more complex use cases.

**Speaker B**

**00:42:32**

Yeah, no, that makes sense. And I would, I think 320 people, people in the audience would be pretty happy with 320. So, um. All right, well, I know we are almost out of time, um, but you guys are such an inspiration to so many people in this audience. Like Dreamforce can be really overwhelming. I see like people taking rapid notes in their notebooks. What advice would you give people as they head home? All this new knowledge, all these new ideas, like how are you guys going to put them into practice? And what advice would you have for this group?

**Speaker I**

**00:43:01**

Um, one piece of advice is to really think outside the box with some of the tools that you have. I think sometimes there's this inclination to go out and buy something new to try to solve a problem, but you might be able to solve it with an existing application. Ah, we were looking to replace our company intranet. Uh, we're mostly in one location. It wasn't as utilized as for the cost. Um, and we actually built out our company intranet using slack canvases. Um, and it's been a hit so far, both with the internal comms team that manages it as well as employees of just having everything in one place. And so, um, it wasn't something that Slack was encouraging us to do, but thinking broadly about what we had, we found the solution.

**Speaker E**

**00:43:42**

That's awesome.

**Speaker B**

**00:43:43**

I bet your finance team is happy to always.

**Speaker A**

**00:43:45**

Yeah.

**Speaker B**

**00:43:47**

Um, all right, Kia, thank you so much for sharing your journey with us and all of the in sites today. All right. And with that, friends, we are basically out of time. Um, but we do want to encourage everyone to get started with all of the tools that they saw here today. You can take a second to scan the QR code. It'll tell you how to get started.

**Speaker D**

**00:44:09**

Um, yeah, as you heard, get going with Agent force. Reach out, get your hands on the technology. It's going to revolutionize your business foundations, is going to help you expand your usage of salesforce. It's going to be incredible. I see a lot of folks taking advantage of the QR code. Most importantly, a huge thank you. Many of you are probably traveling out today or tomorrow. I hope you have safe travels. I hope. It's been an incredible dream for us. You're leaving energized at the possibilities. You've made some new connections. We appreciate you coming in bright and early. Of course, Whitney. We want a little feedback, right?

**Speaker B**

**00:44:38**

Yes. We love to give people homework and feedback is a gift. So please take a moment, um, to give us your feedback on the way out. I, uh, think there's going to be a slide that will tell you how to do that. Um, so thank you again for coming. We don't want to stand between everyone and their cheese because that's an incredible way to end this keynote today.

**Speaker H**

**00:44:55**

Yeah.

**Speaker D**

**00:44:55**

Enjoy the cheese. Thanks for everything. Good luck with Agent force and safe travel.

**Speaker A**

**00:44:58**

Thanks.

**Speaker B**

**00:44:59**

Bye, guys.

**Speaker A**

**00:45:26**

Hi, I'm Ashley Alabeosu, CXO experiences manager here at Salesforce. Welcome to Dreamforce. I'm here with trailbuzer Monica from text us. Hi, happy to be here.

Monica, it is not your first dreamforce.

**Speaker A** **00:45:37**

What brings you back year after year? Just the level of innovation that comes out of Salesforce every single year. Um, our company is excited to get familiarized with, um, Agentforce. Um, obviously artificial intelligence is the future. We want to make sure that we're not lagging behind. Awesome. So what are you most excited about? About agent force? Goodness. I think just the level of efficiency, uh, I think that there's an opportunity across every single department within our organization to reduce that response. Not responsibility, but deal to focus on.

**Speaker E** **00:46:12**

Our core, you know?

**Speaker A** **00:46:14**

Uh, I would say our core focuses right. Like when our sales, we want our salespeople to be able to sell more efficiently and the fact that, you know.

**Speaker E** **00:46:25**

We're able to utilize them as potential.

**Speaker A** **00:46:26**

Bdrs and sales coaches is just something that's phenomenal, especially for a company that's, that's on the scaling.

**Speaker G** **00:46:32**

Yeah, it's awesome.

**Speaker A** **00:46:34**

We want you to be excited for agent for us. Any other sessions today you're looking forward to? You know, I'm heading to a, uh, marketing and commerce session. Yeah.

**Speaker E** **00:46:42**

Um, you know, I work british, predominantly.

**Speaker A** **00:46:44**

In the partnership space. Uh, but it's just everything flows so easily, everything is so interconnected.

Very excited.

**Speaker G**

00:46:51

Awesome.

**Speaker F**

00:46:51

Well, thank you so much for joining us, Monica.

**Speaker A**

00:46:53

Yeah, thank you. I appreciate it. Thanks.

**Speaker B**

00:46:56

Your feedback on the show today helps to make us better. So please take a moment and follow the QR code on screen and fill out our event survey as a thank you, you'll be entered into our Dreamforce 2025 sweepstakes. You have a chance to win one of five passes for Dreamforce 2025.

**Speaker J**

00:47:19

Agentforce helps you extend your workforce by building AI agents that work together with humans to drive customer success. You can get started with one of many pre built agents, but you can also create your own custom agents because if you can describe it, Agent Force can do it. Which means you'll start by describing in natural language the job you want this agent to do, like an agent that reviews new travel expenses, but then watch what happens next. Agent Force is searching for semantically similar resources in your customer 300 sixty's metadata. And based on this awareness of how your business works, Agentforce Auto suggests topics and actions for doing this job. And if we click into one of these topics, we'll see that Agent Force is using your existing business logic like flows, apex classes, and Mulesoft integrations to enable your agents to take action. Then agent force will auto suggest instructions based on that business logic that become the rules and guardrails your agent will adhere to while doing this job across one or more channels, like this travel expense agent, which I want to work not only in slack, but also in the background when it's triggered from a flow. And the final step is to equip this agent with the data from your customer 360 that it needs to do this job. Which means this agent now has a role and the actions and knowledge it needs to do that role. So let's create it. And now we have a new travel expense agent that we're ready to test and refine here inside agent builder. But remember how I added a flow as one of the channels for this agent? I did that because I want this agent to work autonomously in the background each time a new travel expense record like this is created, which means I need to create a record triggered flow. Each time a new travel expense record is created, this flow will be automatically triggered. But here's something new. I want to invoke this new agent from

inside this flow by passing it the id of the travel expense record that needs reviewed. And then I just need to switch back over to agent builder and teach this agent how to interact with this new channel. And when I activate this agent, anytime a new travel expense record is submitted, the agent will autonomously review it in the background and then notify the employee in slack of the outcome of this review. And this is how agent force helps you extend your workforce, by turning the business logic you've already created in your customer 360 into AI agents that you can trust to reliably do jobs in your company. Thanks for watching.