

Dreamforce Live: Build Your Agentforce

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Speakers:

Speaker A - 12.67%

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Speaker C - 13.41%

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Speaker F - 15.31%

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Speaker H - 12.09%

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Notes:

- Digital agents are shaping the future of sales and service. We just heard more about Salesforce's newest tool, service agents. Humans and agents driving customer service

together. Up.

- Deloitte has a 20 year partnership with Salesforce. We are laser focused on the traditional CRM platform. And we're looking to more of the AI around tableau pulse and activating data cloud.

- Katrina: Our experience with Salesforce has been absolutely amazing. It's steep, deep in collaboration and innovation. I love our partnership with Deloitte. This is my 12th dream Force. Every time it has been a joy.

- Mehmet Arun: What is your advice for other companies looking to employ Salesforce?

Kirsten: There's just a tremendous amount of data that needs to be organized in a thoughtful way. Katrina: Take a human lens when assessing how you integrate to salesforce.

- Mehta: Salesforce's biggest differentiation is across the platform. Data can come from anywhere and I think Salesforce has truly understood m what matters, and data matters at the end of it to drive business outcomes. Think of AI as a technology but as a business outcome enabler.

- Sales cloud can automate tasks for sales teams so they can focus on the things that really, really matter. Only works if there's trust. Let's hear from Deloitte about how Salesforce helps them and their customers.

Speaker A

00:00:08

Digital agents are shaping the future of sales and service. We just heard more about Salesforce's newest tool, service agents. Humans and agents driving customer service together.

Speaker B

00:00:18

Up.

Speaker A

00:00:18

Um, next, the sales cloud keynote accelerate growth pipeline to paycheck. But let's catch up. Here's your Dreamforce headline. You can build your own agents with Salesforce's new agent force platform, anybody can create and test and scale custom agents using the uniquely low code tools deeply integrated on the Salesforce platform. The future of AI agent and app dev is in your hands. So break it down for us. Why is this such a big leap? Is what's being described today.

Speaker C

00:00:45

Yeah, a big leap. And part of it is it's built on the Salesforce platform. So those things that you know and love, the tools that you build, it's deeply embedded. But trust is our number

one value and we've really, really made sure to build that into every component when it comes to agent force. So when you think about that trust layer and LLMs, um, we are actually not sending any data. So we talk about zero copy, meaning we interact and exchange that information, but they don't hold onto it. So it's only learning based on your data, not anybody else's. And so that trust layer becomes really, really important. And agent force has gone from, uh, it's leaps. We talk about those leaps and it's because of that action that it does take. We're really, really excited to put this in the hands of all of our customers. Sales, service, commerce and marketing now have agents that can take action on your.

Speaker A

00:01:41

Behalf in, uh, just a few seconds. Explain to me what the thing you're most excited about. Hearing more about today.

Speaker C

00:01:46

I think the action piece of it and showing customers how it takes action with those guardrails in place.

Speaker A

00:01:52

Excellent. And you don't have to just take our word for it. Let's hear from Deloitte about how Salesforce helps them and their customers. Digital transformation.

Speaker D

00:02:01

Hey, everyone, I'm Shaleah Shipman, senior director of product marketing at Salesforce. And I'm excited to be joined here today by two lovely ladies from Deloitte. We have Katrina Bonnerwit, growth chief information officer at ah, Deloitte. And we have Kirsten Rhodes, vice chair and client relationship development leader. Thank you so much for joining us.

Speaker E

00:02:20

Really, thanks for having us.

Speaker D

00:02:22

Absolutely. Absolutely. So Kirsten, I have a question for you. For those watching who may not be familiar with Deloitte, I don't know how that's possible, but it may be. Can you tell us the services you provide and more about your role.

Speaker F

00:02:34

Sure. So we are the largest global professional services firm in the world. Uh, we provide our clients consulting services, uh, ranging everything from strategy to technology

implementation and operations. Uh, we have our audit and assurance business and then our risk financial advisory businesses as well as our tax, uh, offerings.

Speaker D

00:02:57

I mean, Deloitte is an impressive operation. What you all have going on over there, how does Salesforce help you serve your customers and your clients?

Speaker F

00:03:05

So it's been a pretty interesting journey. Right. We have salesforce as the backbone of our CRM to technologies. But when we think about the way in which we want to serve our clients in a much more modern, sophisticated, with distinction, we realized that it was really important to start thinking about all the other technologies and clouds that Salesforce offers, uh, to create a, uh, much more informed and intentional way in which we engage our clients. And so we're thrilled to be using r 360 in a much more sophisticated, uh, way to, uh, intelligently, uh, advise our partners on the relationships not only that they have, where they can be adding, uh, value with those clients. And then really, uh, the important thing is we've always tracked clients at the aggregate level. This is an opportunity for us to do it at the individual level and come up with a lifetime value at the individual level, which is critical as you think about, uh, being sophisticated in a modern society.

Speaker D

00:04:11

100%. I mean, innovation is pushing us in a direction where, even if we are not a consumer, where we're purchasing something retail, but we are a consumer of technology or information or anything that's going to advance our business. We are expecting that personalized experience and all businesses are shaping in that way. So in order to be really successful, you have to be on the cutting edge.

Speaker F

00:04:32

That's right. Um, we knew we had to make those investments and specifically take advantage of the technologies that you are bringing forth. Uh, we're so excited, uh, to add agent force to our 360 as well. So we can't wait to see the outcome of that.

Speaker D

00:04:48

I love that. Well, thank you so much. Katrina, I'm going to throw a question over to you. So what Salesforce tools do you employ?

Speaker E

00:04:54

So we have a 20 year partnership with Salesforce and it's driven through collaboration and

innovation. We are laser focused on the traditional CRM platform, including tableau pulse, Mulesoft, and we're doing exploratory work around agentboard, as Kirsten mentioned. And we're looking to more of the AI around tableau pulse and activating data cloud so that we can eliminate the swivel chair of data for our leaders.

Speaker D

00:05:17

Well, I love that. As a product marketer of data cloud, anytime you're mentioning data cloud, I light up. So I'm very happy to hear that Deloitte is a datablazer. So Katrina, tell us, what has been your experience with Salesforce?

Speaker E

00:05:30

Our experience with Salesforce has been absolutely amazing. Like I indicated, we have a 20 year partnership. It's steep, deep in collaboration and innovation. We are consistently whether we're going to market, it's a sell to, it's a build with, it's a buy from relationship. We always feel like Salesforce is a part of our journey both now and in the future. And we look forward to all the amazing things that we can actually activate together.

Speaker D

00:05:52

Well, I love that and I love our partnership with Deloitte. I've been at Salesforce for eleven years. This is my 12th dream Force. And there have been so many opportunities that I've had to partner with Deloitte and every time it has been a joy. So thank you so much. Um, what is your advice for other companies looking to employ Salesforce? And I'll begin with you, Kirsten.

Speaker F

00:06:11

Well, I think there's just a tremendous amount of data that needs to be organized in a thoughtful way. And so I'll go back to what you're most key, keenly interested in as well. Uh, but to use that data in a much smarter way. Um, I've been in technology for well over 35 years and this is the first time I am extremely excited about the integrated aspect of informing, becoming, uh, predictive in a much easier way, uh, so that our clients get the right value and impact that they've been looking for.

Speaker D

00:06:44

Absolutely. That's always the win, right? Absolutely. And Katrina, what about you?

Speaker E

00:06:48

I would add to the data element that Kirsten just mentioned, but I would also say you have to take a human lens when assessing how you integrate to salesforce. Looking at people, process and technology and really understand the experiences and how Salesforce can

help bring those to life.

Speaker D

00:07:04

Yes. Well put. Both of you, thank you so much for taking the time to chat with us. Excited for the rest of the week. I hope to bump into you.

Speaker F

00:07:12

Absolutely. Thank you.

Speaker D

00:07:13

Of course. Thank you.

Speaker G

00:07:21

Mehmet Arun, welcome.

Speaker H

00:07:24

Thank you. It's a pleasure to be here.

Speaker G

00:07:25

Thank you so much for being here with us. Meht, you have been in the Salesforce ecosystem for several years. What keeps you with us?

Speaker H

00:07:34

I remember 20 years ago when we were first developing Salesforce. It was a company that focused on providing business results instead of spending time upgrading. This is when Salesforce was a Salesforce automation solution for b two b only service. Cloud came about because sales reps would be asked about what cloud came about. It is always about, uh, solving business problems in the best, fastest way possible. It is the best alternative. And over the years we have the trailblazer community trailhead, always a learning culture to drive business value with trust, with reliability. So that's why I keep coming back.

Speaker G

00:08:16

After 20 years and speaking about learning. What excites you now about our Salesforce AI innovations that we're hearing about today.

Speaker H

00:08:24

So I think Salesforce's biggest differentiation is across the platform and that is what we are seeing across Dreamforce today. Data can come from anywhere and I think Salesforce has

truly understood in what matters, and data matters at the end of it to drive business outcomes. So whether your data lives in a third party data lake, it's in a different transactional system. It's one of the Salesforce business applications. How do we bring it together in a consistent, complete, contextual and compliant way and drive AI solutions that meets the latest regulations coming out of Europe. And more importantly, not think of AI as a technology but as a business outcome enabler. When I hear about the agent for sales, service marketing in different industries, that is what it is all about. Talking to nonprofits about how they can raise more money to deliver on the calls, that is what gives me energy to get up and work with them. It's an amazing community.

Speaker G

00:09:22

We're so excited to have you here. Thank you so much for being here.

Speaker H

00:09:25

Thank you so much today. Thank you. Take care.

Speaker G

00:09:29

Hi, I'm Monica Bowie, director of marketing at Salesforce and I'm here with Alan Mann, director of the AI Innovation hub at Slalom and Katie Lewis, director of Data Cloud at Slalom. Thank you both for joining us and welcome to Dreamforce.

Speaker B

00:09:43

Thanks for having us.

Speaker G

00:09:44

Excited to talk to you all. And I would love to hear how the integration of Salesforce, data cloud and AI, I'm sorry. And Einstein enhances the capabilities of predictive and generative AI for businesses.

Speaker B

00:09:55

Awesome. I mean, this is the topic of the day, um, specifically, to have actionable, well grounded AI, you need good data from across your organization, both structured and unstructured. And that's where data cloud really comes into play.

Speaker H

00:10:10

Yeah.

Speaker I

00:10:10

Ah, we've seen, you know, the traditional engineering problems of orchestrating AI in the enterprise are so rapidly being resolved by the Salesforce platform and our clients are just eating it up. It's, yeah, it's a great time to be part of the ecosystem.

Speaker G

00:10:23

Awesome. And speaking of your clients. Can you share some real world examples with clients that you guys have worked with and how you've transformed their business with AI and data?

Speaker I

00:10:30

Yeah, absolutely. We've been deploying AI, uh, in Salesforce for uh, a number of years now, um, from a conversational AI perspective and generative AI over the last two years. Uh, last summer we deployed the first digital service agent built on the Einstein platform for virgin voyages. Yeah, we're still really excited about that story. Um, upwards of 30% deflection almost immediately. Introduction of semantic search and the evolution of the platform for them has just been amazing. I think we're at about 13 live deployments of generative AI on the platform at this time.

Speaker G

00:11:01

Exciting.

Speaker B

00:11:01

Yeah. And then we have uh, various other data cloud stories as well. Like we've been able to work with DECM and some fantastic digital transformations, some of those we've spoken about at Dreamforce.

Speaker G

00:11:13

I'm m excited and that's awesome to have a partner like you all joining us here at Dreamforce. Congratulations on having so many successful deployments and thank you for being with us.

Speaker H

00:11:21

Yeah, thanks for the invite.

Speaker G

00:11:23

Thanks for tuning in.

Speaker I

00:11:30

At slalom. Aligning AI, uh, investments with ROI is our top priority. Rai uh, accelerator with datacloud quickly activates generative AI capabilities in Salesforce.

Speaker B

00:11:39

The key to unlocking AI's potential is a strong data foundation. Salesforce's data cloud excels by unifying all of your Salesforce and third party data into a single source of truth. This unified data empowers the Einstein one platform to deliver predictive and generative AI capabilities across your Salesforce ecosystem.

Speaker I

00:11:59

Imagine um, custom virtual assistants delivering personalized experiences and data driven insights. Plus features like Byom and ByOlm and baked in guardrails via the Einstein Trust layer ensures flexible and responsible AI ready.

Speaker B

00:12:13

To transform customer engagement with AI. Start your journey with the first strategic partner for data cloud and AI. Today.

Speaker A

00:12:37

Digital agents are shaping the future of sales and service. We just heard more about Salesforce's newest tool, service agents. Humans and agents driving customer success together. Up next, the sales cloud keynote accelerate growth pipeline to paycheck. So let's catch up. Here's the Dreamforce headline. You can build your own agents with Salesforce's new agent force platform. Anybody can create and test and scale custom agents using the low code tools deeply integrated on the Salesforce platform. The future of AI agent and app dev is in your hands. Carolyn Bathauer break it down for us. So what do you think are the biggest headlines? How does it work and how do you trust it.

Speaker H

00:13:18

Yeah.

Speaker C

00:13:18

So especially with sales cloud. So as we go in the sales cloud keynote, the most amazing thing is that when you automate tasks for your sales teams, you're taking the mundane things that they do each and every day and doing it for them so they can focus on the things that really, really matter, including speaking with customers. And so with the new SDR agent, we can take those tasks, automate them, explain to the individual that you're interacting with, that you are talking to an agent, and then when the person is interested, you can automatically book a meeting with the sales rep. And so then it connects them. So

all of those one on one interactions based on all of the very specific account data can happen with that agent. Then the team focuses more.

Speaker A

00:14:04

Only works if there's trust.

Speaker C

00:14:06

Yes.

Speaker A

00:14:06

All right, Carolyn, thank you very much. And again, don't just take our word for it. Let's hear from Deloitte about how Salesforce helps them and their customers. Digital transformation.