

Discover Service Cloud at Dreamforce

Auto-transcribed by <https://aliceapp.ai> on Wednesday, 18 Sep 2024.

Synced media and text playback available on this page:

https://aliceapp.ai/recordings/aSOt8A6_esGqvIdECwNMrJDyPTj9IK3g.

Words	5,901
Duration	00:31:46
Recorded on	Unknown date
Uploaded on	2024-09-18 19:43:41 UTC
At	Unknown location
Using	Uploaded to aliceapp.ai

Speakers:

Speaker A - 7.9%

Speaker B - 15.59%

Speaker C - 7.83%

Speaker D - 15.13%

Speaker E - 6.46%

Speaker F - 10.68%

Speaker G - 25.83%

Speaker H - 10.59%

Notes:

- Service agents transform how you handle customer interactions by effortlessly managing requests across different channels and contacts. Leveraging the customer 360 and data cloud, it provides personalized service from answering common questions to automatically scheduling appointments. To check out even more innovations in action,

check out our keynote on demand on Salesforce plus.

- Porvy John and Christina share their experiences with the service blazer community. The community helps solve real world problems, share best practices and tips. Join dot serviceblazer.com to learn more.

- Tim Casey shows how service cloud creates effortless experiences from first contact to final resolution on any channel. Using data cloud dynamic content, Jonathan was presented with relevant workflows and content to serve up self service knowledge. This is brand new, fully autonomous AI powered by Einstein.

- Salesforce's conversational AI assistant for CRM delivers trusted AI responses grounded with your private data. By leveraging flow in the existing automation tools inside Salesforce, our AI can call on standard actions or customers can build their own. Now let's go ahead and dive into operations and showcase how managers, supervisors are leveraging salesforce to deliver efficient service.

- I'm joined by Chris Battles, SVP product Management Salesforce and Brent Circa, CIO, Warren Cat. Tell us a little bit about Warren Cat and your journey with Salesforce. Warren Cat's journey around Salesforce started with service. More efficiency and a better customer experience is top of mind for you.

- Christopher Battles. SVP product management field service salesforce, and Brent Circa, VP of M It, Warren Cat. So happy you guys could join us on the broadcast. Thank you.

Speaker A

00:00:00

Let's dive right into the four steps to transform your service experience with agent force. Step one, deploy AI agents on channels. We're saying goodbye to chatbots. And hello to Agentforce service agents. Service agents transform how you handle customer interactions by effortlessly managing requests across different channels and contacts. Agentforce service agents handle high volumes of requests efficiently, from reactive queries to proactive outreach. And it manages cases across channels, from WhatsApp to voice, all in your brand's tone. Leveraging the customer 360 and data cloud, it provides personalized service from answering common questions to automatically scheduling appointments. And when a complex issue arises, it escalates to service reps with ease. Built on the Salesforce platform, service agents are grounded in trusted knowledge and data, and you can quickly get started with prebuilt templates or even take it to the next level and customize it with low code options. The result? Personalize customer experiences at scale. Step two, transform insights into actions. Imagine having real time insights into your service center operations, tracking your performance, spotting bottlenecks, and understanding customer sentiment instantly. Well, now you can. With customer experience intelligence, this powerful tool unlocks the full potential of your customer interactions by providing up to the minute insights or more personalized experiences that drive growth. And with AI at uh, your side, you can maximize every customer relationship and make lightning fast decisions that are informed. Step three, elevate teams into trusted

advisors enter agent force and data cloud, game changers that transform your service teams into trusted advisors by integrating AI directly into their workflow. This isn't just any AI, it's AI that's deeply embedded into your enterprise knowledge base, which proactively crafts strategies based on case, data intent and engagement history. With service planner and knowledge on data cloud, your service teams are armed with the right information and are empowered to deliver personalized, impactful solutions. And step four, deliver proactive field service. Your field teams are the face of your company, but outdated, inefficient processes put them and your customers at a disadvantage. From managing work orders to onsite visits, every step is filled with challenges that ah, push customer service to the back burner. And that's why we're transforming field service into a customer first operation. That's right, with dispatcher, agent scheduling and emergency management becomes seamless. Asset service prediction leverages AI to anticipate service needs and prevent downtime before it happens and before it impacts your customers. And multimodal troubleshooting, well, it's super cool. It lets your text get quick solutions through photos or even voice commands. Well, those were your four steps to transform your service experience with agent force. To check out even more innovations in action, check out our keynote on demand on Salesforce plus.

Speaker B

00:02:58

To unpack what the latest agent force innovations mean for service, I'm joined by Porvy Desai, senior director of product marketing at Salesforce. Jon Hansling, director delivery support NRC Health, and Christina Nava, directory director of Salesforce strategy. Gaggle, welcome.

Speaker C

00:03:15

Thank you.

Speaker B

00:03:16

Now, M. Purvi, the big announcement. Here is Agent Forest. Can you recap what it is and why it's such a game changer for service?

Speaker D

00:03:22

Yeah, absolutely. So I want everyone to think about their best customer service experiences. They're probably effortless, they're efficient, they're personalized, and they leave your customer feeling very satisfied and happy. Now, imagine taking that same experience and delivering it every single time across any channel 24/7 that's what agent for service agent is going to do. And it's a fully autonomous AI agent that's grounded in trust and trusted data and knowledge that can work autonomously across any channel. Um, and so this is really the big game changer. What's huge? Yeah, it's huge. And what that's going to do is really free up human service agents to take on those more

complicated cases and build those kind of relationships. So that's really, um, a true, like, game changer customer service. I've been in customer service almost ten years now and I've never seen anything like this.

Speaker C

00:04:13

Wow.

Speaker B

00:04:14

Hi, Mark. Sorry. John and Christina, what are your initial reactions when you hear about agent force and everything that it can do?

Speaker E

00:04:21

Yeah, I think I'm really excited because one of the things I loved that I heard this week was humans with agents delivering customer success. And I think when we apply service agents at NRC Health, it's really going to help turbo charge a lot of the work that our agents are already delivering to customers and partners every day, accelerating that and adding onto it with all the power that agent force is going to help deliver.

Speaker B

00:04:42

Yeah. Christina, what about you?

Speaker C

00:04:44

I was super excited to see everything that we could do. I already have a notebook full of ideas to go back and try to implement as fast as possible. It's going to help our sales reps, our customer support reps, and just knowing that we're going to be able to do more faster, more efficiently, be able to put the data right where it's needed at their fingertips is very exciting, super exciting.

Speaker B

00:05:07

Now, Purvi, we heard Mark talk about Salesforce foundations. Now, uh, what does this mean for service cloud customers in particular?

Speaker D

00:05:15

Yeah. So for service cloud customers who already have a license, whether they have a starter license or all the way to an unlimited license, this means that out of box now in their license is included the best of sales cloud, marketing, cloud, commerce cloud and data cloud. So now every single one of our customers can experience the power of the Salesforce platform. Um, and no really with data cloud also it's bringing together automatically all that data to build that powerful customer at 360 that we all know is so

essential for personalization. So um, I encourage everyone to go turn it on, try it out and just experience the full power of the platform.

Speaker B

00:05:49

Cool. Now recently Salesforce launched the 6th edition of the State of Service report. What is this and what are the biggest takeaways, especially when it comes to AI and agent force.

Speaker D

00:06:00

Yeah, so this report is uh, something uh, our team puts together and I really love this because it's our chance to kind of get a pulse on the market. We've interviewed over 5000 service and field service leaders to just kind of understand what's important to them. What are the trends they're looking out for, what are they growing toward, what is top of mind? Um, and what we found was that there's three key takeaways. It's AI obviously proactive service and um, the last one is revenue generation. So with AI obviously it's very top of mind. And the way that we kind of um, did the research is that we looked through high performing service uh, organizations and 88% of them are already investing in AI technologies and the rest are already looking towards that. And now proactive service is the other, the next trend which is super interesting. Um, I had a friend who had, he just had a child and yet a baby monitor that short ah, circuit if something happened. Um, but he didn't even notice. Uh, the company actually reached out to him proactively and let him know that there was something wrong and they were automatically sending out ah, a shipment. He was blown away. Right? Like how many proactive service experiences really do you get every day? And in fact 33% of customers only think that customers provide or uh, companies provide proactive customer service. So with that he was blown away. He posted it on his social media, um, it was free marketing for the company. So proactive service is super tough in mind and not the companies really want to crack. And then the last one is revenue. Now we saw that age of four service agent is changing the game now um, service agents are going to be freed up, human service agents are going to be freed up to take on more complex tasks and also be relationship builders and really drive that. And they field service agents. Service agents are the, of the company. They're the ones engaging with them. And so now service was always typically a cost center, but now it's really primed and ready to be, uh, a profit, uh, center.

Speaker B

00:08:05

Amazing. All right, well, if you want to download that full report for yourself, there's a QR code on screen or you can head to the link. SFDC co stateofservice six. It's a wealth of insights on the latest trends in customer and field service. Now, John, tell us a little bit about NRC Health and how you're leveraging AI today in your strategy.

Yeah, so one of the things I love about the alignment between what NRC Health is doing and what Salesforce is doing is really going beyond the buzzwords and putting AI in the hands of our employees today. So a couple examples of how we're doing that at NRC Health today, we're taking simple tasks and saving agents time by doing things like meeting summaries and case summaries, allowing them to unlock more of their time for higher value activities. Also leveraging AI for some more difficult, uh, tasks like data detection and the customer data that our customers send us. M so these things together along with uh, um, all the power that the AI solutions that Salesforce are going to provide, our agents are really going to unpack their ability to deliver higher value to customers.

Speaker B

00:09:06

Great. And Christina, what about you at gaggle? How has your AI strategy evolved even in the last twelve months?

Speaker C

00:09:13

It's changed a lot. So from twelve months ago it was what is this AI thing? I don't trust it. Is it giving me the right answers? Do I want to do this to uh, you know, throughout the last twelve months, studying up more understanding about the trust layer with Salesforce and realizing that it is something we can trust because with gaggle we have to be very careful with the data that we expose. So I was very nervous and very concerned with that. So learning to trust all of it to now all of a sudden I'm like, okay, I want all AI for everything as fast as possible. So I have a list of things I'm going back to. You know, I've already kind of dabbled in it with the case summaries and all of that, but I really want to start delving in and doing more of the deeper stuff, especially agent force. Super excited for that. So over the last twelve months, I've gone from I don't know to yes all the time now.

Speaker F

00:10:07

Wow.

Speaker B

00:10:07

Uh, it's been a really rapid evolution it has happening. Now, porby mentioned proactive service. How are you going to implement that into your strategy coming forward?

Speaker C

00:10:17

So, with the proactive service, uh, for me, with a service leader, it's very important. I'm a big believer in the effortless experience for the customers and being proactive and being able to go to them. Hey, we're seeing this happening, you know, what can we do to help you out? That's really important. So now that we can use AI to help kind of uncover some of those things that might be happening, that's going to be, I think, a real game changer for our customers. Yeah.

John, do you want to weigh in on proactive service?

Speaker E

00:10:45

Yeah. So I think for proactive service, I think what I loved, what I saw in the service cloud keynote today was really giving customers that delightful experience, going beyond the standard chatbot and all the frustration that it can lead to delivering delightful experiences for customers that can really unlock a lot of upsell opportunities and cross sell opportunities for customers. So that's something I'm really excited to explore more about at NRC Health.

Speaker B

00:11:07

Cool. And now, Porvy, you mentioned the role of service agents evolving from now just being customer service oriented to now being involved in revenue generation, which never used to be a KPI before. Can you expand a little bit on that?

Speaker D

00:11:21

Yeah. So like I mentioned previously, um, the role of service agents is evolving. With the rise of AI, um, all of that kind of common routine tasks will be automated. So, um, ah, service reps are really poised to build trusted relationships with their customers and really drive that, um, innovation. And I think, um, the lines between sales and service are starting to blur, um, especially in field service. Right. They're the ones that are going to their customers homes. They're in their homes fixing things. They're really the face of the brand. And they build those relationships with those customers, build that trust, and now with the right tools that we have in field service and that we have in service cloud, they have all those upsell data and those products and what's personalized for that customer that they could have those conversations and make those upsells. So, um, I think it's really a pivotal moment and a moment really, um, where we're going to see that service centers are now really revenue generators. And it's like, as you heard in the keynote, it is service leaders moment to lead and it truly, truly is.

Speaker B

00:12:25

Yeah, it's a big shift now. I can't help but notice these adorable blazers you guys have on, and we can't pass up this opportunity to hear more about the service blazer community? Can you really quick sum up what it is? And then we're going to show a quick.

Speaker D

00:12:37

Absolutely. So service Blazor community is a place for field service and service professionals to connect, learn from one another. And we just launched a, ah, slack community. So it's really, really easy to interact and we're in a whole new world with AI. So learn from one another, connect, and.

Join such a resource. All right, well, let's take a look at the sales Blazer community. A service blazer community.

Speaker E

00:13:29

M.

Speaker B

00:13:34

All right, John and Christina, what have been your experiences with the service blazer community?

Speaker E

00:13:38

Yeah, I'll just say that there is a lot about Salesforce. There is lots of knowledge articles. You can spend hours and hours online googling help and finding solutions to all the problems that we deal with on a daily basis. But having a community online in slack that we can readily engage with on a daily basis to solve real world problems, share best practices, tips, super beneficial, super helpful. And it's been super exciting to connect with some of those service blazers here at Dreamforce this year.

Speaker B

00:14:03

You get to see them in person when you're here. That's nice. What about you, Christina?

Speaker C

00:14:07

So I think people possibly think that we throw around the words ohana in community and we don't really mean it, but I can tell you that we do. The service blazer community has been home. I've made friends. When you're having a hard day and you sometimes don't know why you're doing what you do, it's a place where you can go and you can talk to people and they understand what you're going through. Even if they can't necessarily help solve your problems, they get it. They understand you. And that is so helpful to get through the day. So it's tips, it's tricks, it's family, it's community, it's Ohana.

Speaker B

00:14:41

I love that. It sounds like such an amazing community. Thank you all for joining us today. If you guys want to learn more, get your phones out because you can just scan that QR code. You can join the service Blazer community, use that code on screen or you can head to the link. Join dot serviceblazer.com dot thank you Porvy John and Christina for joining us on the broadcast with your insights about what's most important and top of mind for service leaders.

Speaker G

00:15:09

Hey, everyone, I'm Tim Casey here with an end to end demo to show you how service cloud creates effortless, uh, experiences from first contact to final resolution on any channel. Let's get started. So, quick intro. We're going to be focusing on our customer Jonathan here, and he's a customer of Sirius mortgage. He wants to explore purchasing a vacation home. In my first vignette, uh, I want to focus on seamless self service. We're going to see how Jonathan can interact with the personalized portal, explore some options, learn about Sirius's offerings, and ultimately connect with a service rep to walk through some questions. Now, Jonathan's journey to vacation home ownership begins with a visit to the Sirius mortgage experience cloud site. Jonathan's going to be guided by personalized workflows and content based on his data cloud unified profile. He wants to start his research by understanding how much he can afford. And again, this is all powered by data cloud. We're bringing in external data. We're servicing it in easy to use workflows as part of the service catalog. Now, Sirius, of course, knows that homeownership is about more than just affordability, so they've included plenty of additional content to help customers like Jonathan on their journey. He notices some additional considerations that second homeowners need to understand. He clicks in, notices something about tax savings, wants to learn a little bit more and uses that global search to see how this is going to affect his taxes. Now, rather than having to parse through a number of knowledge articles, search Answers is doing all the work, provides Jonathan with a summary sourced from knowledge that directly answers his question. Now, mortgages are tricky and Jonathan has an existing HELOC, so he decides to reach out to Sears for some additional help. Upon launching the chat, Jonathan's greeted by agent four service agent. And this isn't a traditional buy experience. This is brand new, fully autonomous AI powered by Einstein. It answers questions using knowledge, executes custom prompts and workflows. It even understands images. Agent four service agent provides the correct answers dynamically and identifies that where he's at on his journey. It's time to hand this one off to a mortgage specialist, so let's go ahead and do a quick recap. What we saw so far is Jonathan was able to leverage the Cirrus portal to explore options around a vacation property. Using data cloud dynamic content, Jonathan was presented with relevant workflows and content to serve up self service knowledge. Articles, generative search answers and Einstein service agent all helped guide Jonathan towards an agent who could pick up right where he left off. So let's go ahead and introduce our agent Amy, who's going to take over from here. What we're going to see here in just a moment is how Amy can leverage intelligence and automation to not only make her more efficient and productive, but also more effective. So first things first, Amy goes ahead and logs into the service console where she has all the tools that she needs to do her job right in one screen. She's immediately presented with metrics around the contact center's performance. Now Amy here is just getting ready to start her shift. Before she logs in, she's going to go ahead and check in with Salesforce's conversational AI assistant for CRM that delivers trusted AI responses grounded with your private data. By using natural language, Amy interacts directly with the AI and understands her adherence. Now this could of course be calculated right here inside Salesforce or pulled in through

one of our many WFM partnerships. Same applies to shift scheduling. This can live natively in CRM or elsewhere. And our flexible object model could easily be adapted by our workforce management partners. And this is part of what makes Salesforce's AI so powerful. By leveraging flow in the existing automation tools inside Salesforce, our AI can call on standard actions or customers can build their own to accomplish almost anything. Now, when it's time to log in, Amy of course sets her presence via online channel, which always gets work to the right agent at the right time. Behind the scenes, all the routing is being handled by Salesforce flow. We've introduced a whole bunch of options around interruptible capacity, which enables customers like Sirius to roll out true blended agent scenarios. As that chat comes in, Amy can immediately pick up where Einstein service agent left off. Right away she understands who Jonathan is and what he represents to Cirrus a unified profile is provided from data cloud to understand all of our touch points across all of Sirius's system of records. Calculated insights are displayed in real time and Amy can dive right in and leverage service replies to kick off the conversation. Now it makes this so powerful that ah, these are grounded in Sirius private data. So case history knowledge, again, whether this lives in Salesforce or we're bringing in externally, is going to power these service replies. As the conversation progresses, Einstein is going to continue to make recommendations using this data as well as the context. Now, case of course has been logged to track the interaction so Amy can understand where we're at on our SLA's and view predictions around escalation rate. Again, what makes this so special is it's also powered by data cloud, which means the model is not only based on CRM data, but we're bringing in those other systems of record the interaction is classified using case classification or historical data on how similar interactions have been classified in the past. And of course, knowledge recommendations are served up using predictive AI, uh, again coming from external sources via unified knowledge. Now, as that conversation progresses, service replies continue to guide our agent Amy when Jonathan wants to explore options around converting to a hybrid HeLOC complex workflows and automation are kicked off with the click of a button and Amy is going to be guided step by step via Salesforce flow. We easily pull in external data housing, data cloud, or even tap into on platform RPA tools from Mulesoft to access legacy infrastructure. Behind the scenes, this workflow is kicking off a sales opportunity to convert the loan and enrolls Jonathan in the relevant marketing content when it's time to wrap up after conversation, work is handled right inside the service console and Einstein once again saves time on the disposition by generating a natural language summary, issue and resolution. Now, last but not least, we can even create brand new knowledge content. As part of this interaction, generative AI starts the process, puts the article in draft format for later review. This way the knowledge is captured in the moment and it feeds right into our knowledge process such as kcs without disruption. So far we've seen how AI plus data, uh plus CRM um power self service provides omnichannel engagement to drive agent productivity. Now let's go ahead and dive into intelligent operations and showcase how serious managers, supervisors and admins are leveraging salesforce to deliver efficient service and improve customer satisfaction. So visibility into operations and the ability to take corrective actions are critical

to maintaining the health and performance of the customer engagement center. The brand new Omni um supervisor wallboard provides a real time view of how work is being distributed and if there's any cues that need attention. If we dive into the agents tab, this enables supervisors to get a real time view of agent status and capacity and gives them the power to optimize their intraday operations by moving agents between queues, assigning skills and more. Conversation intelligence rules, monitor conversations and automatically raise flags when an agent needs help. Through conversation catch up um Einstein is able to provide a summary for the supervisor and they can lean in with guidance to help agents deliver amazing service. Now, while visibility into real time performance is critical to operations, supervisors also need the ability to analyze trends in key metrics like work volume, speed to answer, and SLA compliant service intelligence pulls together data from across systems and channels to provide out of the box actionable insights for supervisors and agents right in the flow of work. These dashboards make it easy for supervisors to determine if service goals and performance metrics are being met. Now finally, Einstein Conversation mining uses the power of AI to help cirrus identify the best areas for automation. Gone are the days of doing this tedious work manually. Conversation Mining Reports group customer data into contact reason and Einstein automatically calculates key metrics like conversation frequency and turns. Einstein uses these metrics to prioritize contact reasons that are meaningful and actionable, making it easy to identify new use cases for self service and automation. There you have it. How service cloud delivers effortless service on any channel. To learn more, head on over to [salesforce.com service](https://salesforce.com/service). Check out our service keynote and more service contact right here on Salesforce plus.

Speaker B

00:23:03

We're diving into the latest field service innovations and how organizations are transforming their field service teams with AI and data. I'm joined by Chris Battles, SVP product Management Salesforce and Brent circa, CIO, Warren Cat. Welcome, you guys.

Speaker F

00:23:20

Thank you.

Speaker B

00:23:21

Brent, let's start with you. Tell us a little bit about Warren cat and your journey with Salesforce.

Speaker H

00:23:26

Sure. So uh, Warren Kat, we're, um, located, well, actually we're a heavy equipment dealer, so caterpillar. So when you think of bulldozers, skid steers, construction equipment, power generation. Now we're a dealer in the West Texas area all the way through the panhandle

of Texas and in Oklahoma. So it's an exciting time for us and you know, really our journey around Salesforce started with service. We um, we knew that we needed a way to schedule and also improve internal efficiencies from an operational perspective. So we started small. We said, all right, let's, let's take a the scheduling and let's give our technicians a way to visually see things. But also can we connect our customer, can we connect that work order, can we connect that asset and the technician, the schedule altogether so you're not having to duplicate work to, say, in another product or just on a whiteboard. I've, um, got this customer a and I need to go do work now. It's at their fingertips and so that was really the start for us, is jumping down that path and so we're excited to be on that path and technicians are using it.

Speaker C

00:24:37

Yeah.

Speaker B

00:24:37

Awesome. Well, it sounds like more efficiency and a better customer experience is top of mind for you. Now, Chris, as a product leader at Salesforce, what are some of the top headlines of these innovations that you're working on and bringing to life here at Dreamforce?

Speaker F

00:24:51

Uh, for field service, we're really focused on how AI can help empower our uh, human workers in field service to do their job even better. Right. So field service in particular, the humans are at the tip of the spear. They're turning the wrenches on the machines, right. They're in the dispatch trying to really figure out complicated things. And so it's about how we bring AI to them through these autonomous agents, through these assistive agents, to eliminate paperwork so they can focus on the task at hand, so they can get the information they need while they're in the middle of a job to complete it, or how they can help, uh, resolve issues, uh, in the back office when they're in the middle of trying to figure out a complicated schedule. So it's all about how AI can empower those humans to do their best work to deliver success for customers.

Speaker C

00:25:36

Yeah.

Speaker B

00:25:36

Now, the AI and data strategy has evolved so quickly for so many companies. Right. Can you tell us about where Warren Cat is on that journey and how your AI strategy has evolved?

Sure. Well, you know, last year we really started down as we were implementing, having that pre work brief. So the methodology is straightforward. Let's keep it simple. Now, the technicians have a job to do. Let's give them the information at their fingertips so they can easily make a determination of what's next. Well, in thinking about our strategy moving forward, really, it's that human centric side, as Chris was talking about. And we have a concept we call minutes matter. And for us, it's not this overarching change, but if we can give technicians time back, then that allows them to scale and service more customers. So minutes matter, and that's really the core of our thought process. But now when we think about our strategy, let's expand that to our supervisory role. Let's give our supervisors and the ones that are helping those technicians really manage that work order process. Let's give them a data element. Let's give them an opportunity to look at things in a different way. Now that we have a lot of really good information coming in, that's our strategy, is let's put those pillars in place. That it's a simplistic view, but it also adds value every turn, not just for our technicians, but also our supervisors to our management team. Therefore, it's a full circle of improvement.

Speaker B

00:27:07

A win win for everybody.

Speaker H

00:27:09

Absolutely.

Speaker B

00:27:09

Now, Chris, where do you see AI having the biggest impact when it comes to customer centric field service organizations?

Speaker F

00:27:16

Uh, again, we talk a lot about how do we eliminate paperwork so we can focus on people work. And Brent talked a bit about this, which is for the technicians out in the field, how do we give them the information so they don't have to be scattering through a bunch of things, but they can get straight to work? How do we, if they're in the middle of a job, how does AI understand what they're trying to do and get them the right information so they can complete that job? Uh, but also, as you've heard a lot this week about agent force, how do you start to have these autonomous agents who can work alongside, uh, the dispatchers or the other parts of the organization to take first some of the routine and easier things off their plate so they can focus on the hard stuff, but then do more and more proactively, be more effective and efficient in helping to scale these organizations? And so it's again, that transition from how do we empower to then how do we kind of work alongside to help bring scale and impact?

How many times I have a service question and someone will come out and I'm like, oh, that was so simple. Like, I probably could have figured that out, or maybe an agent could have figured that out for me.

Speaker F

00:28:18

Well, that's the power of agent force that you'll see, as we've seen from service, where something can start with a, hey, I just have a question. Uh, but it can naturally morph into, oh, actually, I actually need help. Someone needs to come out and help me. And the ability for agent force to transition from, oh, I'm just giving you answers to a question to, I'm going to schedule an appointment. I'm going to work with you. To figure out a time that works for you is a power of how this whole system works together.

Speaker B

00:28:42

Taking those pain points out of the way and making it seamless.

Speaker C

00:28:44

I love that.

Speaker B

00:28:45

Now, Brent, before we close out, what would be your top tips for organizations looking to start their AI strategy, and especially with now agent force in the mix?

Speaker H

00:28:54

Well, I think it's important to find the value. If you're just going to throw something out there and you don't have a value proposition, then you're really not going to use it to its fullest potential. So whether it's like we thought about, let's keep it simple, let's give our technicians an easier way to get that information. Or you want to go full scale with Agent force and you really want to dig deep and say, as a starting point, let's start there and let's see who needs to go out to the field. That's really important. And then you also have to think about the future. It's not about today. It's a starting point today. But where are we going? The two to three to five? Even further? Because that's going to help drive that AI strategy, because that AI strategy is going to stick with you as long as you're moving forward.

Speaker F

00:29:39

Uh, one thing I'd love to pile on is across all the different sessions that I hear from every customer, it's all about change management. So how do you start with a clear use case that is valuable to your, uh, employees or to your customers that you can define and then you can build from there. Once you start having success, other people want to pile on and

jump onto that. So be careful with starting too broad, but like, have this iterative, value driven approach that you can bring your employees on and drive success across your organization.

Speaker B

00:30:06

Yeah, that's really great advice because I'm sure some people come. Like our last interview, Christina, she's like, I'm so excited to get started, but having those actionable steps of what can we achieve in the proper timeline and in the proper order. So it's really great to hear from you guys. Do you have any final thoughts about Agent force, Dreamforce? Some of the innovations that you've seen this week? Any what's exciting you the most? Chris, we'll start with you again.

Speaker F

00:30:31

I think Agent force is, uh, incredibly exciting. I've only been here ten months and it's some of the most profound change I've seen. And this ability, again, to have these agents that you can quickly spin up, they can work across different parts of your salesforce landscape. You can do it with no code, just through human text and language. Uh, it's an incredibly empowering tool for admins and the whole organization, so couldn't be more excited.

Speaker B

00:30:53

What about you, Brent?

Speaker H

00:30:54

I mean, Agent Force is incredible, but I think it's empowering that it's all coming together. There's now action. When you saw yesterday in the keynote, everything has a purpose. That's exciting, especially from a visibility perspective. So exciting times. For sure.

Speaker B

00:31:09

For sure. Well, thank you both so much for joining us and sharing your insights. We appreciate it. I'm sure our audience would like to learn more. So now is the time to get your devices out. Scan that QR code on screen. You can download the field service guide or go to the link. SFDC dot co FSG 24. Thank you. Christopher Battles. Chris Battles, or just battles. SVP product management field service salesforce, and Brent circa, VP of M It, Warren Cat. So happy you guys could join us on the broadcast.

Speaker A

00:31:44

Thank you.

Speaker F

00:31:44

Thank you.

Speaker H

Thanks.

00:31:44