

Dreamforce Live: Put Agentforce to Work

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Speakers:

Speaker A - 5.38%

Speaker B - 6.99%

Speaker C - 29.33%

Speaker D - 14.07%

Speaker E - 7.36%

Speaker F - 34.21%

Speaker G - 2.67%

Notes:

- Learn how to scale faster with connected data in our SMB and growth keynote. See how data, AI and a connected platform can scale your sales, marketing and service teams. Hear how other businesses use Salesforce to grow fast. Your path to success with Salesforce, Salesforce customer success and partners.

- The initial focus has been on productivity and cost savings. Successful organizations look

at data not as a solvable problem, but as a lifelong journey. They understand that the value exchange is now different for end users. And so they're taking progress over perfection, and they're getting started.

- Brian Gauch: What advice do you have for leaders who are embarking on or in the midst of tech? Enable large scale change. To link Genai to business objectives, there are two exercises all of you need to be doing.

- Salesforce EVP for sales, Connor Marston. Customers see agent force and AI as a force multiplier to help them drive better customer experiences. Customers looking to help drive revenue and help with cost.

- Salesforce's agentforce has a natural language conversation with the customer. Customers are really excited about the potential to change the conversation with their customers. Salesforce is seeing a lot of traction with customers who are live today and in production.

- Dreamforce virtual hands on workshops with the QR code virtually experience the latest data and AI innovations for free right here on Salesforce plus. Each day features a new technology that will transform your business. More than 400 deep dive sessions, product keynotes, big. Name conversations and stories of customer success will be available only on salesforce Plus.

Speaker A

00:00:12

Agent force. Humans with agents drive customer success together. That's the headline from Dreamforce. But there's so much more to come. Here's what's coming up next. First, we'll learn how to scale faster with connected data in our SMB and growth keynote, see how data, AI and a connected platform can scale your sales, marketing and service teams and hear how other businesses use Salesforce to grow fast. After that, your path to success with Salesforce, Salesforce customer success and partners will guide you on a path to success with agents and AI.

Speaker B

00:00:52

Look at me now. I'd like to thank innovator sponsor BCG for their support of Dreamforce. Joining me now is BCG managing director and partner Brian Gauch. Thank you so much for coming. Well, what are some of the key factors, uh, in achieving a successful tech enabled transformation?

Speaker C

00:01:18

When we look at how organizations have been successful and frankly how those have failed, there's the uh, standard people, process technology and data have to be aligned across both business and it. But if we peel that back a little bit, there's three key things that we observe at BCG that we think make the people that are unlocking the total

outcome of their investments a little bit different than those that are not being successful. Number one, organizations truly who are successful understand that a transformation is a mindset before it's a muscle, right? It's not a fad diet. That's three months. It truly takes nine to twelve months to truly transform the culture and the people and process of the organization. Two, if business is not leading the program, we call it business led, it powered, it becomes an IT project. And tech enabled transformation is important because it's in support of the business. And I think the third is organizations that can get decision frameworks right are fundamentally more successful for two main reasons. They get the decision rights correct with senior leaders in the C suite who sign up for accountability, everything from comp down to their leadership teams involvement. But we also see that organizations have decision velocity. And so when you look at decisions and technology that allow you to keep the focus on what we call your orange is your orange. Don't change it to a grapefruit halfway through. Yeah, business leadership has to support and help it make decisions fast along the way to keep the transformation program on.

Speaker B

00:02:48

That's great. People, process technology, data and making decisions fast. That sounds like a pretty good recipe. So what is the role of AI in all this? What are some of the challenges and the opportunities you're seeing with those AI transformations?

Speaker C

00:03:02

So the role of AI has been interesting because as we've seen it, the initial focus has been on productivity and cost savings. And what we're seeing with organizations is they're saying, and then, so what's up next? And so as we see organizations truly invest in AI, those that are successful look at data not as a solvable problem, but as, uh, a lifelong journey. And they understand that the value exchange is now different for end users. And so they're taking progress over perfection, and they're getting started. I think the other thing that we're seeing for successful organizations that are avoiding some of the pitfalls is they're looking at the culture of the organization, the actual end user, and the channels that they use as a part of their normal day, versus saying, go here for everything, because no one goes to one place for everything. So serve them where they are, optimize for their behavior, and then track and measure the benefit and the feedback that they like it or not.

Speaker B

00:04:00

It sounds like what you said, business led, leads to that success. So that's amazing. So, last question. What advice do you have for leaders who are embarking on or in the midst of tech? Enable large scale change.

Speaker C

00:04:12

So I think there's two or three that typically come to mind when they say, what should I

focus on? How do I get it right or wrong? Similar to the previous question, I think number one is don't feel failure, but with that said, plan accordingly.

Speaker D

00:04:27

Sure.

Speaker C

00:04:27

Right. I think Eisenhower said it best. Right. Plans are required, but they're useless the moment you get into the fight. And with AI powered transformations, it's a known truth that things will go wrong. But if you look at how we're seeing our clients and frankly, the technologies that they're using, especially Salesforce.com and data cloud and agent force, there's a myopic focus on what data is required to unlock our people. How do I take the data of CRM, how do I unlock trap data? And then how do I actually use the technology, like we're hearing this asian force, to actually start to drive lovability, right? So lovability becomes super important. And as we start to pivot leaders mindsets from the minimum viable product to minimum lovable product, there are a whole paradigm shift. So it goes back to mindset before muscle, right?

Speaker B

00:05:18

So it sounds like love, uh, ability leads to adoption, which is great. So, Brian Gauch, thank you so much. From BCGA.

Speaker C

00:05:25

Thank you.

Speaker E

00:05:36

To link Genai to business objectives, there are two exercises all of you need to be doing. One is truly understanding what Genai can do, understanding what are the tools the methodologies, the software packages out there that exist and what are they good for, what they can be used for versus nothing. At the same time, you need to do the constant business hygiene of thinking through what are your customers biggest pain points, what are you really solving for and what is going to give you competitive advantage. And you're doing those two things in parallel. And just the discipline of going through the thinking motion of how can you use Genai to solve these biggest problems is something that needs to be a regular rhythm and part of your ongoing muscle build. And if you do that in a consistent way, you're going to start identifying those opportunities of how you're embedding Genai into everything you're doing.

Speaker D

00:06:40

Now let's dive into what customers are saying about AI and how Salesforce and Agentforce are answering their needs. I'm Monica Bowie and I'm joined by Salesforce, EVP for sales, Connor Marston. Hi Connor.

Speaker F

00:06:52

Hi. How you doing, Monica?

Speaker D

00:06:53

Doing great. How's your dream force week been?

Speaker F

00:06:55

It's been fantastic.

Speaker D

00:06:56

A lot of energy out there, lots of energy. And um, I know you talk to a ton of customers, probably more than you can keep count on, so we'd love to hear from you. When you're talking to customers, what are they focused on when it comes to AI and implementing AI and what are they excited or concerned about?

Speaker F

00:07:11

Yeah, well, I mean, a lot of conversations about AI. Agent Force is on fire right now at uh, Dreamforce. Uh, and really customers, it comes down to two areas. Customers are looking to help drive revenue and they're help looking to help, uh, with cost and that's either by eliminating certain roles but also repositioning to other parts of the organization to higher value work. Uh, and they really see agent force and AI as being um, as a force multiplier to help them drive better customer experiences.

Speaker D

00:07:42

Yeah, exactly. Lots of people are in the space of autonomous AI and so we always have to talk about our differentiators, obviously here at Salesforce. So talk to us a little bit about what separates agentforce from other autonomous agents and why is salesforce uniquely positioned to be a leader in this space?

Speaker F

00:07:58

Yeah, that's a great, that's a great question. So first and foremost it's about an agent, uh, that's being delivered via channel and it's about having a natural language conversation with the customer that's not like a traditional bot that's going through a tree structure that can, that can break out into thousands of possible iterations. You have to pre program, uh, um, uh, to yield a certain outcome. So customers are really excited about, uh, the potential

to really change, uh, the conversation, uh, with their customers, to, um, build new experiences for their customers, and to kind of break down the walls between sales, service, and marketing. You can start with the service conversation then, hey, I'm going to give you a 50. Sorry. For your challenge, I'm going to give a \$50 off coupon to go and drive, uh, or buy this product or service from it, all contained inside the service agent. It's very exciting. Um, uh, and we're just seeing a lot of traction with our customers who are live today and in production.

Speaker D

00:08:55

Yeah. And we saw some of those customers during the keynote, so we're really excited to learn from them on what they're experiencing so far. So what are you hearing from customers that are already trying? Agent Force.

Speaker F

00:09:05

So I've been working with Saks now for over a year, and so Saks is my customer. I hope everyone goes and checks out the demo, the keynote. And what was absolutely phenomenal about Saks is we were able to get them live in one week on our Einstein service agent for their first, uh, use case. And I'll share a quick, um, example. Um, in the Einstein service agent, I asked a question, and since you're sitting here next to me, I was like, hey, my friend Monica has scuffed jewelry. Can't you return it? Right? And they have a knowledge article that has all their policies for jewelry. One of it's like, if a, ah, jewelry is damaged, they're not going to take a return on damageden jewelry. But there's no context in there that says what scuffed jewelry is. There's no description but the AI and the LLM and the data is smart enough to know that scuffed equals damaged. And so when you ask the, uh, um, what they call Sophie, their Sofie, uh, bot, it's able to understand the context of it. And so it came back with a response of, no, you can't return that jewelry because scuffed means that it's damaged, and it's not, um, available, not programmed. It just understands. It's almost magical, how it, uh, works to solve customers problems.

Speaker D

00:10:12

I love that fantastic story, and we all love Saks. So I think we're all going to get our shopping, uh, fix done when we leave here. So, last question for you. What's your message to customers looking to build on our customer 360 and build their own agents and their own AI agents. And what should they do to get started?

Speaker F

00:10:28

Well, I think to get started, you know, I just had a roundtable discussion with Steve Fisher with 30 customers and we got that exact same question. And really it's about finding that, what's that first use case that you're going to drive, uh, to start your AI, uh, journey. So for saks it was a return policies. Uh, let's expose that to customers and let's make it easy for

them to understand when they can and can't return things and what the policies are around that. We had um, uh, another customer, um, a really large consumer, uh, packaged good company. And their first use case is where's my order? And they saw a 70% reduction in um, agent effort to solve that one symbol question using um, agent force. I was just in a meeting with them and they're absolutely fired up about adding additional uh, use cases. And so that's the key. Find that one area where it's taking a lot of effort for your customer, um, service agents or your salespeople to tackle a task and start by automating that using an autonomous um, agent. And then once you have that one use case, look for the second, 3rd, fourth and fifth use case. And so much so that you're uh, addressing the entire customer, uh, experience.

Speaker D

00:11:40

Yeah, I love that. That's a great uh, segue into getting things started. We always want to know where our packages are and tracking those. So great understanding of what we're looking forward to with Agentforce. Connor, thank you for joining us.

Speaker F

00:11:51

Thanks, appreciate it, Monica.

Speaker D

00:11:52

All right, talk to you soon.

Speaker G

00:11:53

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Speaker A

00:12:17

Your agent force learning continues right here on Salesforce plus.

Speaker F

00:12:22

Over the next few days, more than 400 deep dive sessions, product keynotes, big.

Speaker A

00:12:27

Name conversations and stories of customer success will be available only on Salesforce Plus.