

# Unlocking Business Potential With Perficient and Agentforce

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**PERFICIENT**



# Contents

Overview ....	3
How AI Is Transforming Business at Every Level ....	6
Why Enterprises Need Agentforce ....	6
AI Consumer Experience Insights ....	7
Where Agentforce Comes In ....	9
Unlocking Business Value With Intelligent AI Agents ....	10
The Art of the Possible: What We're Seeing in the Field ....	11
How Agentforce Works to Deliver Trusted Automation ....	12
Agentforce Skills: Transforming Workflows Across Industries ....	16
Perficient Is a Leading Salesforce Enterprise Consulting Partner ....	18
Comprehensive Services and Offerings ....	20
Client Success: Transforming With Salesforce ....	21
The Future of Work Starts With Agentforce and Perficient ....	24

# Overview

## Purpose

This guide explores how Salesforce Agentforce 3.0 is transforming business operations through AI-driven automation, real-time data, and intelligent customer engagement. Offering more than 40% gains in efficiency and self-service, Agentforce represents a fundamental shift in how enterprises scale and operate. It highlights what sets Agentforce apart—from the technology powering it to the business case driving adoption—and why leading organizations are moving quickly to implement AI agents.<sup>1</sup>

While Agentforce provides the platform, Perficient has the strategic guidance, execution, and industry expertise necessary to turn innovation into measurable impact. Our approach aligns AI-driven tools with broader business goals—whether improving customer experiences, accelerating time to market, unlocking data, or reimagining workflows.

This guide offers a clear view into the potential of Agentforce and the value of having the right partner to deliver success.

<sup>1</sup>Salesforce Agentforce Press Release

## Key Insights

- **Beyond LLMs—turning AI into enterprise action:** Agentforce combines the power of large language models with reasoning engines to enable goal-driven, context-aware AI that can plan, adapt, and act across complex enterprise workflows.
- **More than a chatbot:** Agentforce is an AI-powered suite of autonomous agents that actively retrieve data, plan, and execute tasks without human intervention.<sup>2</sup>
- **AI that works like a team:** Agentforce uses agentic frameworks and supervisor agents to assign goals, coordinate tasks, and manage quality—enabling AI agents to work together like human teams with built-in oversight and resilience.
- **Data as the backbone:** Agentforce runs on Salesforce Data Cloud, a real-time unified data platform that ensures AI has access to accurate, context-rich information.

<sup>2</sup>AI Agents vs. Chatbots Explained

## Key Insights

- **Scalability on demand:** Agentforce empowers teams by augmenting employees, allowing them to focus on strategic, high-touch customer interactions while automating routine processes.<sup>3</sup>
- **Salesforce Agentforce vs. Microsoft Copilot:** Agentforce operates autonomously, retrieving data, creating action plans, and executing tasks. It's like a digital assistant that handles complex processes without human input. Copilot, on the other hand, is a collaborative AI assistant that provides suggestions and insights but relies on human interaction. It enhances productivity but doesn't make fully autonomous decisions.<sup>4</sup>
- **Responsible and governed AI:** Agentforce operates within organizational guardrails to ensure ethical AI use, data privacy, and compliance. With Perficient's guidance, organizations can deploy AI that's powerful and trustworthy.

<sup>3</sup>Salesforce News & Insights

<sup>4</sup>Agentforce Salesforce Knowledge Article

# How AI Is Transforming Business at Every Level

As businesses strive to improve efficiency and enhance customer engagement, AI-driven automation has become a fundamental driver of digital transformation. Agentforce represents a leap forward in AI-powered automation, enabling organizations to deploy specialized AI agents that work alongside human talent. This technology is poised to revolutionize industries by automating complex processes, reducing operational costs, and improving customer experiences.

## Why Enterprises Need Agentforce

Every day, Perficient works with enterprise leaders who are navigating challenges including rising customer expectations, operational inefficiencies, and the complexity of disconnected systems. These organizations don't need another piece of technology—they need intelligent solutions that deliver real outcomes.

Enterprises also struggle with workforce efficiency and employees who spend excessive time on administrative tasks:

- Salespeople spend 71% of their time on non-selling tasks such as data entry and administrative work.<sup>5</sup>
- Service reps spend 66% of their time on non-customer-facing tasks instead of resolving inquiries.<sup>6</sup>
- 85% of customer service reps who use AI say that it saves them time.<sup>7</sup>



## AI Consumer Experience Insights

### Salesforce Snapshot Research

With insights from more than 15,000 consumers around the globe, this overview aggregates data from multiple double-anonymous Salesforce surveys conducted between August 2024 and October 2024 to explore consumer experiences and the opportunity for AI agents.

#### Consumers waste valuable time on customer service interactions

**9**

longest number of hours consumers have spent resolving a single customer service issue

**87%**

of customer service calls result in at least one transfer

#### Consumers want quick, seamless customer experiences

**1/3**

would rather purchase a product automated/digitally vs. with a person

**1/3**

would work with an AI agent to avoid repeating themselves

**54%**

don't care how they interact with a company as long as their problems are fixed fast

#### Consumers frequently walk away from frustrating experiences

##### Top Customer Service Frustrations

Lack of self-service

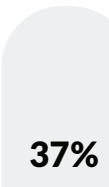
Too many transfers

**31%**

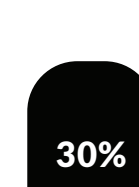
consumers walk away from nearly one-third of their customer service interactions

#### Gen Z are most open to AI agents

% Would Use AI Agents for Faster Service

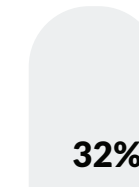


Gen Z

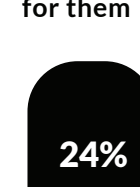


Total

% Comfortable with AI Agents Shopping for them



Gen Z



Total

Organizations across industries are under increasing pressure to optimize operations, enhance customer experience, and increase profitability. However, key challenges hinder these goals:

- **Workforce productivity:** Employees, particularly in sales and service roles, spend excessive time on administrative tasks, limiting their ability to focus on value-driven activities.
- **Customer expectations:** Consumers demand seamless, instant, and personalized experiences, with frustration mounting when interactions require multiple steps or transfers.
- **Technology fragmentation:** The average enterprise manages nearly 1,000 different applications, making it difficult to create a seamless, efficient workflow for employees and customers.<sup>8</sup>

## That's Where Agentforce Comes In

Supported by Data Cloud, Agentforce empowers businesses to automate tasks, personalize experiences, and unlock insights from all corners of their data—structured and unstructured, inside or outside the Salesforce ecosystem. Using advanced AI reasoning and retrieval capabilities, Agentforce enables agents to take informed action in real time, without constant retraining or manual updates.

But technology alone isn't enough. To realize Agentforce's full potential, companies need a partner that understands how to align AI capabilities with strategic business goals. That's where Perficient delivers.

We bring deep industry expertise, a proven global delivery model, and a hands-on understanding of how to design and deploy intelligent automation that works in the real world. From healthcare to manufacturing to financial services, our clients turn to us not just to implement Agentforce, but to help them reimagine what's possible for their business, such as:

- Eliminate manual, low-value work across functions
- Use real-time insights to drive better decisions
- Deliver faster, more-relevant customer interactions
- Maintain trust and compliance with enterprise-grade AI governance

When AI is paired with smart strategy, operations aren't just streamlined—they're transformed.



## Unlocking Business Value With Intelligent AI Agents

The evolution of AI has paved the way for intelligent automation solutions that not only support human workers but also operate autonomously to execute critical tasks. In the past, automation was limited to rule-based workflows that required predefined inputs and outputs. With Agentforce, businesses now have access to AI agents that can analyze data, adapt to new scenarios, and make informed decisions in real time.

Agentforce comes with pre-built AI agents with specialized skills that can be tailored to various business functions, including sales, customer support, marketing, and commerce. These agents work seamlessly within the Salesforce ecosystem, leveraging real-time data and AI-driven insights to streamline operations and drive business success.

Perficient helps align these out-of-the-box capabilities with businesses' unique workflows, customer journeys, and industry priorities to ensure Agentforce automates and accelerates results.

“We’re at a pivotal moment where every business, CEO, manager, and employee has the chance to reimagine what it means to get work done,” said Adam Evans, SVP Product, Salesforce AI Platform. “By embracing an agent-first approach, every business can redefine their operations and stay ahead—right now.”



## The Art of the Possible: What We're Seeing in the Field

Perficient helps enterprises move beyond basic automation to unlock the full power of Agentforce. This isn't about hypothetical use cases—these are real-world outcomes happening right now.

- **Proactive service resolution:** We've implemented Agentforce agents that detect early warning signs in customer behavior—like sentiment in support tickets or delayed product activations—and trigger automated outreach or internal case creation before the customer even makes contact.
- **Multichannel sales orchestration:** We've deployed AI agents that coordinate sales activities across channels to analyze engagement data, prioritize leads, generate personalized follow-ups, and surface next-best actions for reps in real time. The result? Shorter sales cycles and higher close rates.
- **Intelligent back-office support:** Agentforce is also transforming internal operations. We configured agents to manage IT ticket routing, monitor system logs, and even draft resolution steps using historical case data to free up staff for more strategic work.
- **Dynamic field service optimization:** In industries like manufacturing and utilities, we've implemented Agentforce to triage service requests, auto-generate technician schedules based on parts availability and location, and keep customers updated with AI-driven notifications.

# How Agentforce Works to Deliver Trusted AI Automation

Enterprise AI is undergoing a major shift. What started with chatbots and assistants is quickly evolving into autonomous systems that can reason, act, and adapt in real time. At the core of this shift are large language models (LLMs) and reasoning engines. When combined, these technologies move AI beyond conversation into execution.

But to unlock AI's full potential, enterprises also need the right data foundation, architecture, and orchestration. The following section explores the technologies fueling this next wave of intelligent automation and how they come together in Agentforce to deliver real business value.

## The Rise of Large Language Models and Reasoning Engines

The current wave of AI innovation is driven by LLMs like OpenAI's GPT-4, Google Gemini, and Anthropic's Claude.

These models have the remarkable ability of natural language understanding, summarization, content generation, and even creative problem solving.

These models form the foundation of modern AI systems, enabling more human-like interaction with AI. However, these language capabilities alone aren't enough to drive enterprise transformation. This is where reasoning engines come into play.

Reasoning engines allow Generative AI solutions to evaluate options and execute multi-step plans toward a defined goal. Reasoning engines are evolving to include retrieval-augmented generation (RAG) and even planning algorithms that bring structure and memory to the otherwise probabilistic nature of LLMs. These engines allow AI to operate in environments that require contextual understanding, state tracking, rule adherence, and long-term decision-making.

By combining the expressive power of language models with the structured cognition of reasoning systems, organizations are unlocking new use cases from dynamic customer engagement to autonomous decision support.

## The Need for Unified and Accurate Data

While LLMs and reasoning engines are powerful, they rely entirely on access to accurate, complete, and context-rich data. Enterprises are beginning to understand that AI is only as good as the data it learns from. This realization has elevated the role of data strategy from an IT concern to a boardroom priority. Organizations are investing in unified data architectures, governance frameworks, and real-time pipelines to fuel AI systems.

Concepts like zero-copy architecture, data fabric, and metadata-driven insights are taking hold as businesses seek to create a single source of truth across systems—an effort exemplified by platforms like Salesforce Data Cloud.

## Virtual Assistants and the Emergence of Agentic Frameworks

As AI interfaces become more conversational and user-centric, virtual assistants have evolved from simple task automation tools into intelligent co-pilots embedded in workflows.

These assistants are powered by agentic frameworks—composable, goal-oriented systems where AI agents can perceive, plan, and act. Unlike traditional automation, agents can be given high-level objectives and figure out the steps to achieve them, interacting with systems and users along the way. This flexibility allows for broader adoption across sales, service, marketing, and operations.

## Supervisor Agents and Multi-Agent Collaboration

Within these frameworks, a new concept is gaining traction: the supervisor agent. These are higher-order agents responsible for overseeing the coordination and delegation of tasks among multiple sub-agents.

They introduce a layer of orchestration and quality control, ensuring that complex workflows are executed efficiently and adaptively. Supervisor agents bring a level of resilience and governance to AI deployments, making them better suited for enterprise-grade applications. This architecture mirrors human organizational structures, creating AI-driven teams that can self-manage, escalate, and refine their processes over time.

## AI-Driven Product Development and Continuous Innovation

The downstream effect of these capabilities is a fundamental rethinking of how products and services are built. AI-driven product development no longer relies solely on roadmap planning or user feedback loops; instead, products are co-evolving with the data and behaviors they observe.

Embedded agents can learn from user interactions, monitor system performance, and suggest or even implement optimizations in near real time. This continuous learning cycle is accelerating time to market, reducing technical debt, and allowing businesses to personalize at scale.

## Bridging Innovation With Data Cloud and Agentforce

The advancements in AI spanning language models, reasoning engines, agentic architectures, and data-centric strategies are converging in enterprise platforms that are purpose-built for scale and trust.

Data Cloud stands at the center of this convergence, providing a unified, real-time data foundation to power intelligent experiences across Customer 360. On top of this, Agentforce introduces a new layer of autonomous intelligence: AI agents and supervisor frameworks tailored to business use cases across sales, service, and beyond. Together, they enable organizations to operate AI not as a bolt-on feature, but as a dynamic system of intelligence that drives growth, efficiency, and innovation.

## Meeting Customers Where They Are With Intelligence and Speed

Salesforce is the world's leading customer relationship management (CRM) platform. Since pioneering cloud-based CRM in 1999, Salesforce has continued to innovate, offering a unified ecosystem of tools that create a comprehensive 360-degree view of every customer.

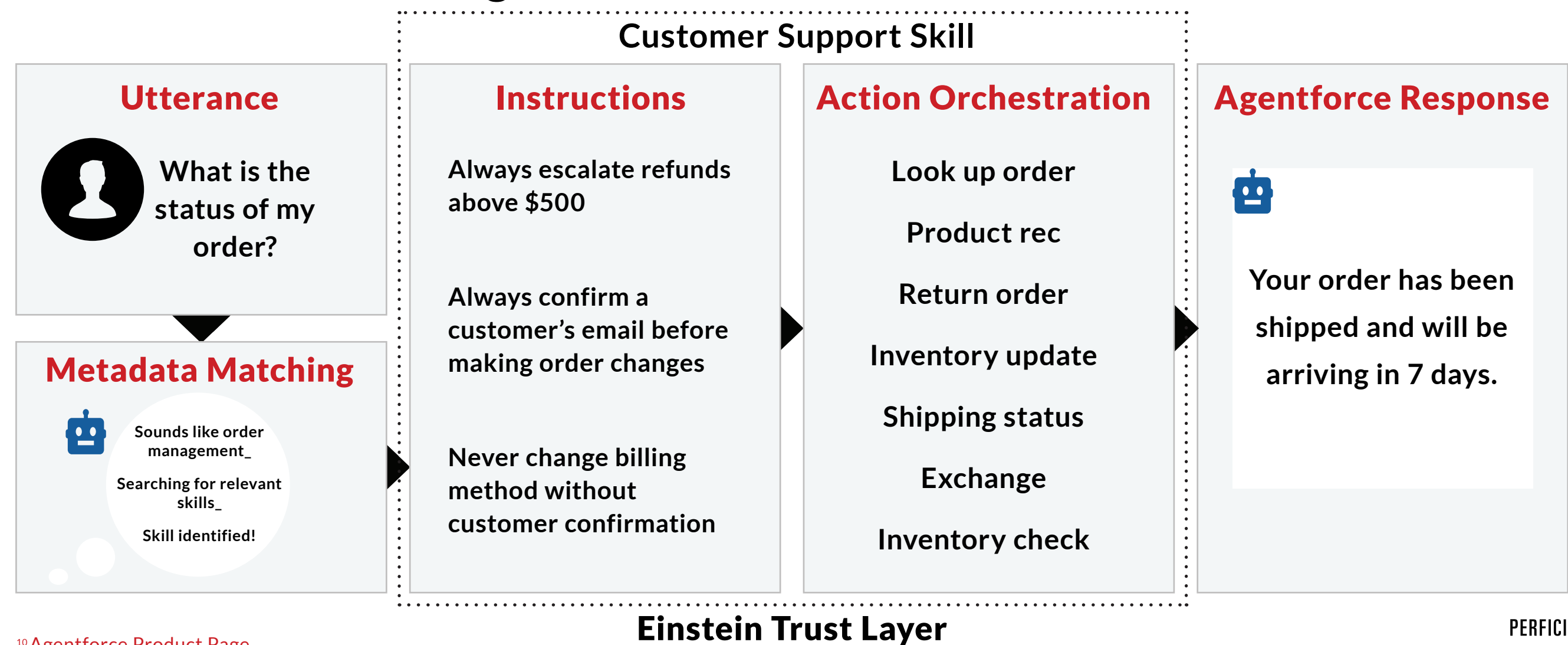
Data Cloud unifies structured and unstructured data in real time, seamlessly integrating with Customer 360 to provide trusted insights and autonomous workflows. As the foundation of Salesforce and Agentforce, it combines data, AI, automation, and human expertise to create intelligent, responsive AI agents. From enhancing customer support to optimizing workflows, Data Cloud drives more personalized, efficient, and impactful interactions.<sup>9</sup>

<sup>9</sup>Salesforce News and Insights

# Agentforce Skills: Transforming Workflows Across Industries

Agentforce is designed to revolutionize workflows by providing AI-driven automation tailored to various roles. The platform enhances productivity by allowing businesses to scale operations efficiently and provide personalized experiences.

## How Agentforce Takes Action With Skills<sup>10</sup>



<sup>10</sup>Agentforce Product Page

## Customer Service Agent

- Automated case classification to prioritize urgent inquiries
- AI-generated responses for common questions, reducing response times
- Seamless escalation to human representatives when necessary
- Predictive issue resolution that identifies customer concerns before they arise

## Sales Development Representative

- Lead qualification automation to ensure reps focus on high-value prospects
- AI-generated outreach templates tailored to potential customers
- Real-time insights that help sales teams personalize customer interactions and close deals faster
- Next-best action recommendations to guide reps on optimal engagement steps

## Sales Coach

- AI-powered training modules to help reps improve sales techniques
- Automated role-playing simulations for practicing objections and negotiations
- Performance analytics dashboards provide insights on individual strengths and areas for improvement
- Personalized coaching recommendations that are tailored to each sales rep's needs

## Personal Shopper

- AI-driven product recommendations based on customer preferences and history
- Proactive engagement by suggesting up-sell and cross-sell opportunities
- Seamless customer support with AI handling inquiries about availability, pricing, and features
- Real-time trend analysis to ensure shoppers receive the most relevant suggestions

# Perficient Is a Leading Salesforce Enterprise Consulting Partner

Implementing Agentforce isn't just a tech project—it's a transformation initiative. That's why we apply a delivery methodology grounded in four key principles:

- **Agile and Scrum:** Fast, flexible sprints that deliver working solutions every iteration
- **Enable and empower:** We build internal capabilities to drive sustainable success
- **Business value discipline:** We align every backlog item to strategic business outcomes
- **Governance that scales:** From data security to platform standards, we bring structure and clarity

We also use a “2-in-a-Box” model that pairs internal product owners with Perficient leads to ensure joint ownership, tighter collaboration, and faster alignment.

And with 100% Perficient-owned delivery centers worldwide, competitive rate structures, and proven business continuity plans, we deliver consistently—wherever you are, and wherever you're headed.





## **Track Record: Proven Expertise in Salesforce Consulting**

Perficient is a Salesforce Partner with more than 15 years of experience delivering innovative digital solutions with Salesforce. A trusted partner to Fortune 1000 companies, we ignite AI-first innovation with solutions including Agentforce, Data Cloud, and Marketing Cloud that fuel deeper personalization and lasting customer engagement.

## **Industry Expertise**

Perficient has deep expertise in industries including manufacturing, automotive, healthcare, life sciences, and financial services. Our flexible global delivery model provides scalable solutions tailored to industry-specific needs and ensures a successful digital transformation.

# Comprehensive Services and Offerings

Perficient's end-to-end Salesforce consulting services ensure our clients maximize their Salesforce investment.

## Strategy and Implementation

- CRM assessments and roadmaps: Evaluate existing Salesforce implementations and define future strategies
- Large-scale deployments: Implement complex Salesforce solutions with industry-specific customizations
- System integration: Seamlessly connect Salesforce with existing enterprise systems using Data Cloud, Marketing Cloud, and Experience Cloud

## Managed Services and Optimization

- Ongoing support and enhancements: Provide continuous monitoring, upgrades, and performance optimization
- Governance and best practices: Ensure compliance, scalability, and security across Salesforce platforms
- AI and data-driven innovation: Utilize Einstein AI, Data Cloud, and Marketing Cloud for advanced customer insights and automation

## Accelerators and Industry Solutions

- Agentforce roadmap workshop: Enable the efficient deployment of AI-powered agents
- Data cloud roadmap workshop: Leverage Data Cloud for a unified customer view
- Partner relationship management accelerator for manufacturing
- Healthcare solutions: Health plan shop, quote, and enroll; patient 360
- Financial services solutions: Segmentation, campaign management, and marketing personalization
- Insurance solutions: Salesforce Digital Direct for modernized customer engagement

# Client Success: Transforming With Salesforce

## Manufacturing – Global Industrial Provider

### Challenge + Opportunity

A leading manufacturer wanted to create more sales opportunities by consolidating key data from disparate systems and providing actionable insights with a new digital sales analytics tool.

### Solution Highlights

Our agile global delivery team engineered a custom solution integrating Google Cloud's data storage and Tableau's reporting into the Salesforce interface with a real-time API.

### Key Benefits

Sales and marketing teams have one interface to research, follow up, and generate new leads from detailed asset and account information, increasing productivity and future revenue.

### Results

- \$1M Realized revenue in three months
- \$18M Pipeline in three months
- 800 Unique users per month



## Healthcare - National Pediatric Health System

### Challenge + Opportunity

A leading pediatric health organization wanted to increase outreach and improve the patient experience, but its leads, forms, and campaign data were housed in a legacy CRM that wasn't scalable for growth.

### Solution Highlights

We implemented Salesforce Health Cloud and connected it to the existing Marketing Cloud instance. We improved functionality and set up a freeware version of Data Cloud.

### Key Benefits

The organization now has a single source of truth and a scalable multicloud infrastructure that supports the ongoing growth of outreach campaigns.

## Financial Services – Top Three Life Insurance Carrier

### Challenge + Opportunity

A leading life insurance company wanted to optimize Salesforce Sales Cloud to automate manual and time-consuming data entry processes and enable Salesforce integration with external consumer lead data.

### Solution Highlights

We automated lead uploads into Salesforce Sales Cloud using a combination of tools: a custom Lightning Web Component (for a user-friendly interface), Salesforce Flow (a low-code automation tool that streamlines complex processes), and custom APEX code. This solution is flexible and can accommodate new record types as business needs evolve.

### Key Benefits

Employees spend less time on manual data entry and can effectively use external data to augment sales processes and improve customer experiences.

# The Future of Work Starts With Agentforce and Perficient

Agentforce marks a new era of AI in the enterprise—one defined by agents that don't just assist, but act. By combining advanced language models, reasoning engines, and real-time data from Data Cloud, Agentforce enables automation that's contextual, proactive, and scalable.

But real transformation takes more than technology.

With Perficient as a strategic partner, organizations move beyond deployment to real impact by aligning Agentforce to business goals, workflows, and industry realities. Our teams bring cross-industry expertise, proven delivery frameworks, and the ability to execute at scale.

Across industries, we've helped clients:

- Eliminate manual work and increase operational efficiency
- Deliver faster, more personalized customer experiences
- Unlock real-time insights and make smarter decisions
- Ensure security, governance, and compliance from day one



## Ready to take the next step toward intelligent automation and growth?

Visit our **AppExchange** listing to explore how Perficient can help implement Agentforce and other Salesforce solutions tailored to your business. Or, contact us to connect with an expert and start building smarter, more efficient operations today.

# Let Perficient help you on your digital transformation journey.

Perficient is the leading global digital consultancy. Our team of strategists, designers, technologists and engineers help the world's largest enterprises and biggest brands boldly advance their business and drive real results through the power of technology. We shatter boundaries, obsess over outcomes, and forge the future for our customers.



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