Front-office marketing and sales agents, automating revenue

Back-office assistive agents that save time and ensure accuracy

FOMU is the AI Adoption Blocker

75% of agentic use cases are thriving in the back office
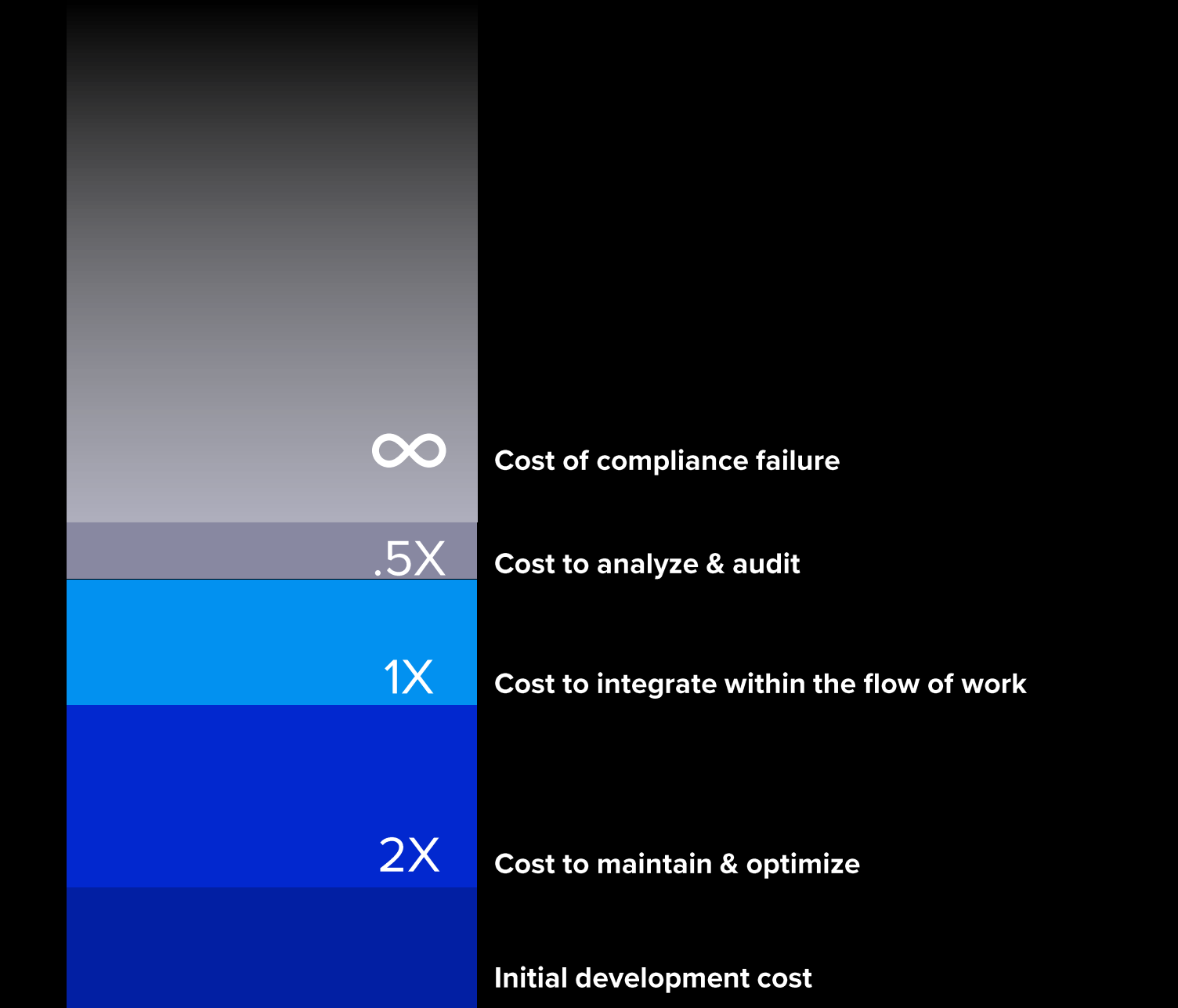
FOMO:

Fear of

Missing Out

- Retail/CPG-led
- Low-risk POCs
- AI as novelty experiences
- Customer-facing

FOMU:

Fear of Messing Up

- Regulated industries-led
- Hight cost of error
- AI for production and efficiency
- Assisted back-office

The **Hidden Costs** of **DIY Agents**

∞ Cost of compliance failure

.5X Cost to analyze & audit

1X Cost to integrate within the flow of work

2X Cost to maintain & optimize

Initial development cost

The **Hidden Costs** of **DIY Agents**

Agents outside of
the flow-of-work

Agentforce is **16X faster, 75% more accurate** vs DIY

MODEL SETUP & DATA INTEGRATION

Data Cloud's pre-built RAG capabilities

15.5 months

DIY

1-2 weeks

AGENTFORCE

GUARDRAILS

Trust Layer

"We don't have the skill, time, or money to build guardrails then audit them on an ongoing basis"

18 months

DIY

1 month

AGENTFORCE

TUNING AGENTIC AI

Atlas Reasoning Engine & Testing Center

24 months

DIY

1.6 months

AGENTFORCE

From FOMU to Business Case

GenAI & Agents Boost Maturity
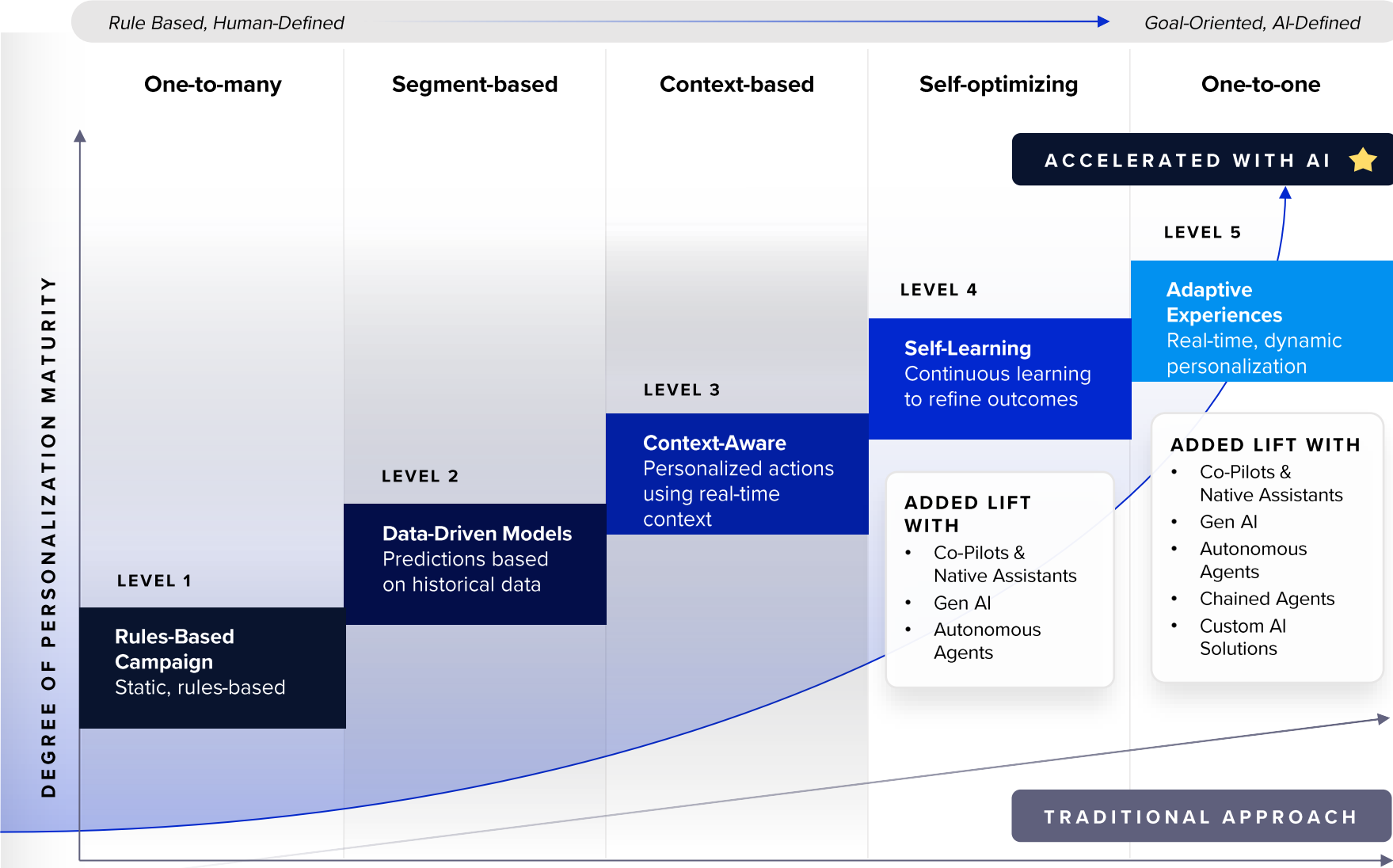Towards Adaptive Experiences
As The New North Star

MATURITY

Opportunity Areas

With MarTech
- Dynamic Website Optimization
- Next-best Action Recommendations
- Personalized Web Content Recommendations
- Real-time,, Omni-channel Marketing
- Predictive Content & Journey Mapping
- Real-time Product Catalog for Inventory Updates

With Co-Pilots & Agents
- Knowledge Base & How-To
- Insights & Data Democratization
- Guided Scripts for History Lookup
- Model & Rule Based NBX
- Workflow Automation
- Content Operations at Scale
- Self-optimizing Customer Service Chatbot
- Prompt Based GenAI For Content Ideation

Rule Based, Human-Defined → *Goal-Oriented, AI-Defined*

One-to-many | Segment-based | Context-based | Self-optimizing | One-to-one

DEGREE OF PERSONALIZATION MATURITY

ACCELERATED WITH AI ⭐

LEVEL 5

Adaptive Experiences
Real-time, dynamic personalization

LEVEL 4

Self-Learning
Continuous learning to refine outcomes

LEVEL 3

Context-Aware
Personalized actions using real-time context

ADDED LIFT WITH
- Co-Pilots & Native Assistants
- Gen AI
- Autonomous Agents
- Chained Agents
- Custom AI Solutions

LEVEL 2

Data-Driven Models
Predictions based on historical data

ADDED LIFT WITH
- Co-Pilots & Native Assistants
- Gen AI
- Autonomous Agents

LEVEL 1

Rules-Based Campaign
Static, rules-based

TRADITIONAL APPROACH

8

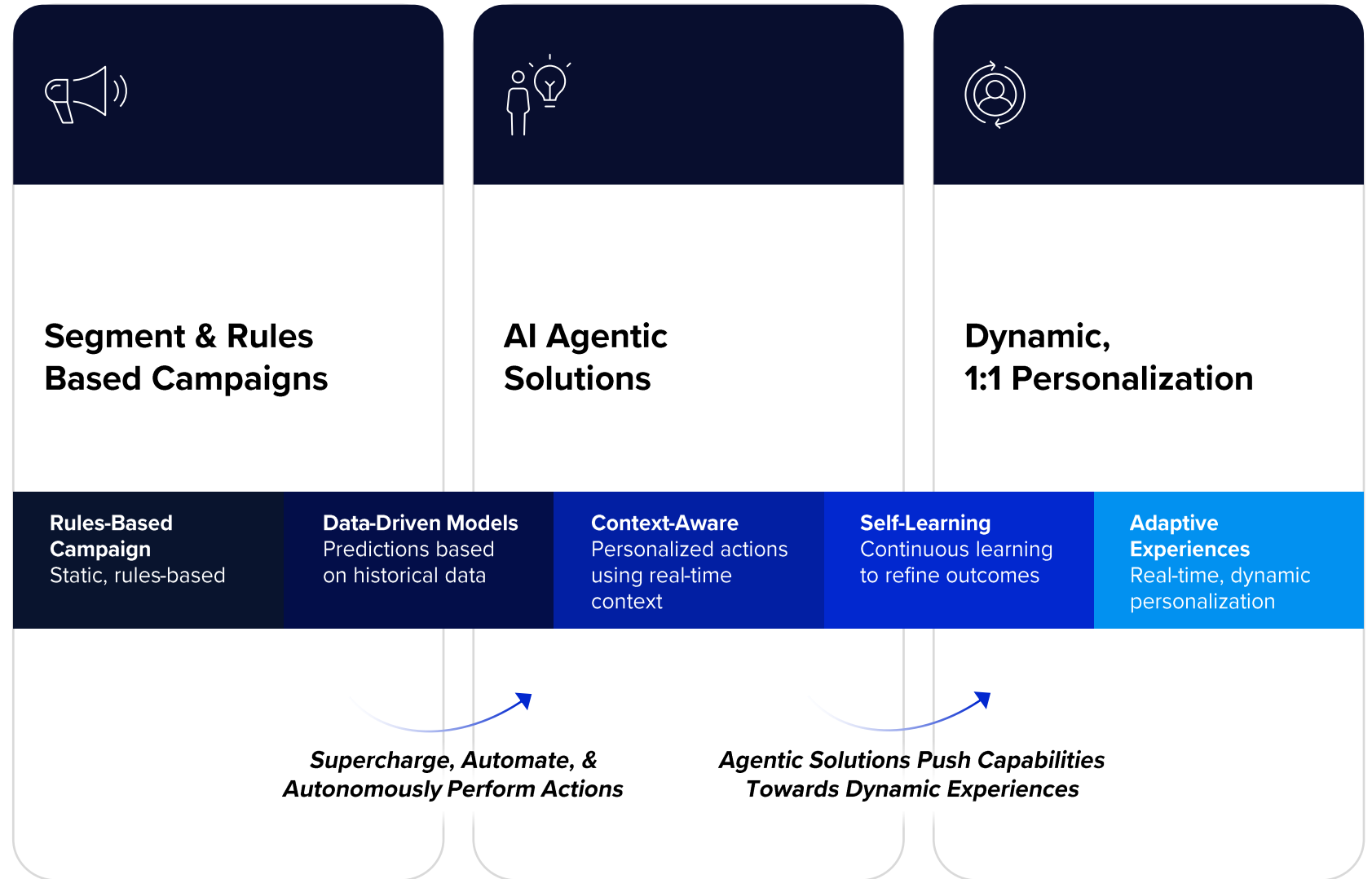# Adaptive marketing maturity powered by AI and agents

Advancing AI maturity requires adapting both technology capabilities and strategy.

—

WHAT

Learn, Adapt & Tailor Experiences

HOW

Integration, Automations & Gen AI

Segment & Rules Based Campaigns		AI Agentic Solutions		Dynamic, 1:1 Personalization
Rules-Based Campaign Static, rules-based	**Data-Driven Models** Predictions based on historical data	**Context-Aware** Personalized actions using real-time context	**Self-Learning** Continuous learning to refine outcomes	**Adaptive Experiences** Real-time, dynamic personalization

Supercharge, Automate, & Autonomously Perform Actions

Agentic Solutions Push Capabilities Towards Dynamic Experiences

Change Management + Agent Governance

Sellers
Engage with prospects 24/7 to nurture pipeline

Service reps
Support customers autonomously 24/7 with natural responses

Marketers
Create campaigns, audience segments, content, and customer journeys

Commerce
Answer order-related questions and take action to manage orders and returns

Human Resources
Field internal employee requests and answer policy-related questions

IT & Engineering
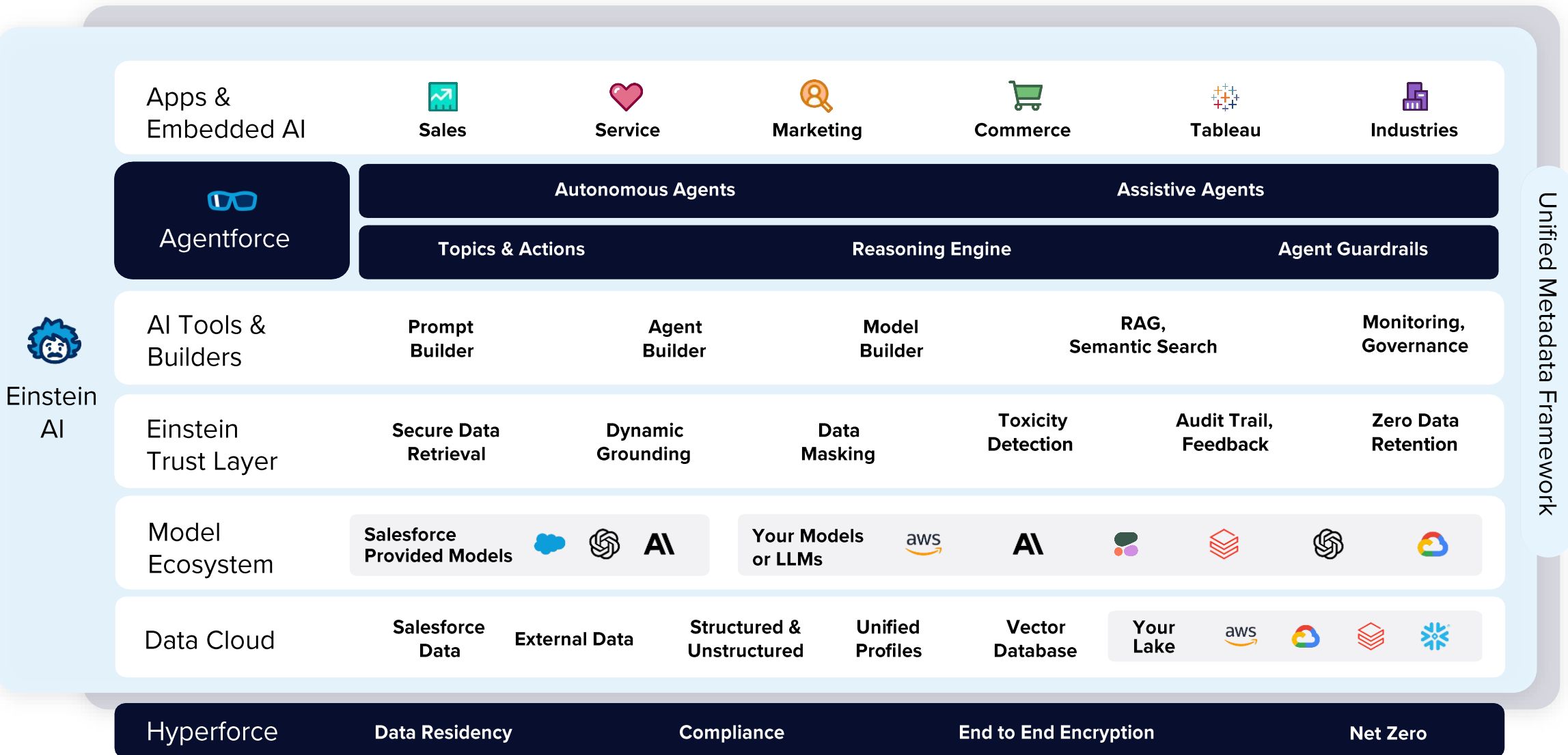Escalate system outages and highlight risks

Finance
Automate invoice processing and flag fraud risks

Product
Support bug identification and performance testing

Why Agentforce Wins

Einstein AI

Unified Metadata Framework

Apps & Embedded AI	Sales	Service	Marketing	Commerce	Tableau	Industries

Agentforce	Autonomous Agents			Assistive Agents		
	Topics & Actions		Reasoning Engine		Agent Guardrails	

AI Tools & Builders	Prompt Builder	Agent Builder	Model Builder	RAG, Semantic Search		Monitoring, Governance

Einstein Trust Layer	Secure Data Retrieval	Dynamic Grounding	Data Masking	Toxicity Detection	Audit Trail, Feedback	Zero Data Retention

Model Ecosystem	Salesforce Provided Models		Your Models or LLMs			

Data Cloud	Salesforce Data	External Data	Structured & Unstructured	Unified Profiles	Vector Database	Your Lake

Hyperforce	Data Residency		Compliance	End to End Encryption		Net Zero

FOMU is Riskier Than Action

	FAST START	Make it **WORK**	Make it **BETTER**	Make it **BIGGER**
LAY THE FOUNDATION	🚀 **Use case launch** ❯	⚙️ **Feature expansion** ❯	🏪 **Brand expansion** ❯	📢 **Channel expansion**
Intelligent AI Virtual Assistants that automate tasks Improve information access and workflow efficiencies	Smart Bot with AI	Leveraging data in Data Lake for siloed Use Cases.	Management of unstructured and structured data sources.	
Utilizing RT data & Sentiments to drive Next Best Experience (NBX) Mature from traditional marketing to Adaptive Experiences	Utilize native platform features	Supercharge Call Center/in-store Rep with guided welcome script	Adapt offers, personalized 1-1 Creative, Email, Landing Pages	

E X A M P L E S

Breaking the Silos: Agentforce for Marketing

Enterprise OKRs				
STRATEGY				
Messaging	Loyalty	Media	Sales	Service
OPS & TECH				
Journeys	Rewards Platforms	DMPs & Ad Servers	CRM	Service Desk
ACTIVATIONS				
SMS, Email, Push, WhatsApp	Offers	Media	Campaigns	Help & Support

What's needed to unlock It

	Enterprise OKRs				
Agent Assisted Analytics **STRATEGY**	Messaging	Loyalty	Media	Sales	Service
Campaign Designer Agent **OPS & TECH**	Journeys	Rewards Platforms	DMPs & Ad Servers	CRM	Service Desk
ACTIVATIONS	SMS, Email, Push, WhatsApp	Offers	Media	Campaigns	Help & Support

AGENTFORCE

Transform Your Organization into an Agentic Enterprise

Join Merkle at CNX to explore how our Agentic AI and Adaptive Experiences approaches can elevate your organizational effectiveness — enabling greater productivity and customer experiences.

Schedule a Meeting with our Agentforce Experts

Connect with Merkle's strategy and technology leaders to define your brand's Agentforce opportunity — from structure and mechanics to high-impact use cases.

Get the Agentic AI Playbook

Thank you!

Q&A

MERKLE + salesforce