



Whitepaper

# Work Smarter in Salesforce: How AI Agents Drive Engagement, Efficiency, and Growth

# Executive Summary

In October 2024, Salesforce launched Agentforce, signaling the start of the AI-first CRM era, powered by intelligent assistants designed to support users in their daily work. While the buzz around Salesforce AI has only grown since, many businesses are still struggling to turn that promise into real, measurable daily impact.

This whitepaper explores how AI agents in Salesforce are transforming sales, marketing, and support operations by eliminating manual CRM tasks, enabling data-driven engagement, and helping teams act faster and be more productive.

We also explore SUMO's AI-native Salesforce platform as an example of how deeply integrated tools create measurable business value.

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# The Shift to Smarter Work:

## AI Agents That Are Reshaping Salesforce

*From reactive manual tasks to proactive automated engagements powered with AI*

Salesforce has become the operating system for thousands of organizations—but its flexibility also leads to fragmented workflows, complex admin, and productivity bottlenecks.

AI agents are emerging as the solution, enabling CRM users to offload repetitive tasks, access insights quickly, and engage smarter—with minimal clicks.

81% of Salesforce teams are actively testing or using AI in daily work. ([Salesforce](#))

## AI Teammates In Your CRM:

### What Salesforce AI Agents Really Are

*AI does the admin. Your team does the thinking.*

Salesforce AI Agents—also known as Agentforce Agents—are intelligent helpers embedded directly into your Salesforce environment. These assistants use natural language processing and machine learning to perform routine tasks, so your teams can focus on the work that matters most.

Rather than replacing human roles, Salesforce AI agents enhance them. They operate like efficient coworkers who:

- Work side-by-side with your teams
- Make your CRM more responsive and intuitive—helping you complete tasks faster and with fewer clicks
- Adapt to different user roles without requiring complex training or setup
- Operate directly inside your Salesforce workflow, eliminating the need to switch between tools or systems

By embedding directly into your existing processes, these AI assistants create a seamless user experience—turning Salesforce into a more proactive, responsive platform for everyday work.

# Factors Driving Salesforce Agentic AI Adoption At Scale

*From fragmentation to focus: What's accelerating enterprise adoption*

- 83% of sales teams seeing revenue growth from AI tools and 4 out of 5 users reporting higher productivity. ([Salesforce](#))

## Salesforce CRM Landscape is Highly Fragmented

Salesforce is packed with features. Its versatility has made it a universal CRM for organizations across industries—from education and healthcare to government and nonprofits. Still, this very strength can also be a drawback. Developers, sales reps, and marketing managers all are using it differently.

A fragmented CRM experience complicates communication among users, management and teams. Salesforce AI agents solve this by providing contextual support for each user's role. They work through a simple chat interface and easily embed directly into your workflow, no matter your Salesforce role.

## AI Gets Things Done Faster

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## Data Management in Salesforce is Limited

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AI agents step on the next level allowing you to manage and process data based on contextual search.

For example, [SUMO's AI meeting assistant](#) lets you pull your Salesforce meeting notes for a particular client or time frame. It returns a human-like summary, links to communication history, and associated records, so you don't need to click into each record to piece together a full picture.

What's more, you can take your next action, e.g. book a meeting or write a follow up right from an AI chat or email. That's way less toggling and more convenience with data handing.

## AI in Action: How Salesforce Teams Are Gaining a Competitive Edge

*Real productivity, smarter focus, and better outcomes across every department*

Salesforce AI tools do more than speed up tasks — they fundamentally transform how teams think, operate, and create value. By embedding intelligent assistants directly into CRM workflows, organizations unlock new levels of focus, responsiveness, and strategic impact.



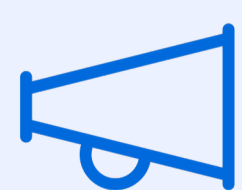
### Sales Teams Sell, Not Just Manage CRM

AI helps reps concentrate on deals most likely to close by automating research, follow-ups, and CRM updates<sup>4</sup>freeing them from chasing dead ends and manual data entry.



### Customers Feel Like You're Always There

With AI surfacing key insights in real time, teams can anticipate customer needs, resolve issues faster, and prevent churn—leading to more responsive, human-like experiences at scale.



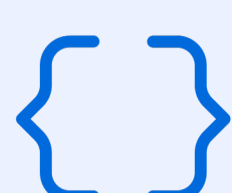
### Marketing Teams Know What Really Works

Instead of guessing which campaigns perform best, AI provides immediate insight into what's driving engagement and conversions. Teams can adapt messaging on the fly to boost ROI.



### Service Teams Avoid Burnout

AI-powered assistants handle routine inquiries and triage support tickets, so service agents can focus on high-impact interactions—not repetitive tasks.



### Tech Teams Work Smarter, Not Harder

Admins and developers use AI to generate logic, test automation flows, and deliver updates faster—with more confidence and less manual overhead.



### Leaders Make Confident, Data-Driven Decisions

Executives gain access to predictive dashboards that not only show what's happening, but what's likely to happen next—empowering better planning and faster pivots.

# The Three Architectures of Salesforce AI Agents

*Understanding embedded, native, and integrated tools—and how deeply they fit into your CRM*

Type	Examples	How It's Different
<b>Salesforce-Built (Embedded)</b>	Agentforce, Einstein GPT, Einstein Search, Einstein Copilot	<ul style="list-style-type: none"><li>- Enabled via Setup, no integration needed</li><li>- Based on Salesforce metadata and UI</li><li>- Aligned with native security and permissions</li></ul>
<b>Salesforce-Native (Built on Salesforce)</b>	SUMO Customer Engagement Platform	<ul style="list-style-type: none"><li>- Built entirely within Salesforce</li><li>- Deepest integration and customization</li><li>- Full access to data model, stored natively</li><li>- High compliance for regulated industries</li></ul>
<b>Integrated (3rd-Party Tools)</b>	ChatGPT, Notion AI, Conversica (connected via API or extensions)	<ul style="list-style-type: none"><li>- Operate outside Salesforce</li><li>- Require external setup and data access permissions</li><li>- Good for specialized tasks</li><li>- May raise compliance and security concerns</li></ul>

## AI Agents Built by Salesforce

Salesforce includes a robust set of AI-powered tools out of the box, many of which fall under the Einstein brand. These agents—also referred to as Agentforce—are developed by Salesforce and come pre-integrated into various Salesforce Clouds, such as Sales Cloud, Service Cloud, and Marketing Cloud.

If your Salesforce edition and license type support them, you can enable these tools directly from Salesforce Setup. Once enabled, they integrate natively into your CRM environment — in dashboards, record views, and search bars.

## Salesforce-Native AI Agents

Native AI agents like SUMO's Agentforce Engagement Assistants are built entirely within the Salesforce ecosystem using native technologies—Apex, Salesforce Flows, and Einstein APIs.

Compared to Einstein's built-in tools, these tools offer enhanced capabilities such as:

- Conversational AI for appointment scheduling
- Real-time meeting note capture
- Pre-meeting research via AI-powered web scraping

These solutions provide enterprise-grade security, full data compliance, and advanced customization—making them ideal for teams with complex workflows or regulatory requirements.

## Integrated AI Tools

Third-party AI platforms often offer Salesforce integrations via APIs or packaged extensions. These tools are useful for organizations looking to supplement their CRM with specialized AI capabilities—like external data processing, lead enrichment, or advanced content generation.

While these assistants are not embedded into the Salesforce platform, they can still provide value when used for targeted tasks. However, they often come with added complexity in terms of setup, integration, and data governance.

# Automating Workflows: Salesforce AI Agents by Business Function

***From sales to service, each team has repeatable tasks AI can optimize***

Salesforce AI agents bring targeted automation and intelligent support to nearly every business role.

Instead of one-size-fits-all tools, these assistants are purpose-built to align with departmental workflows—making Salesforce more responsive, productive, and outcome-driven.



## AI Sales Assistants

### Enable smarter selling and reduce time spent on admin work

#### Use Cases

- Research and summarize public info about contacts, companies, and past interactions
- Auto-capture meeting notes and attach to the correct Salesforce object
- Draft contextual follow-up messages with next-step actions
- Mine CRM data to auto-prompt next best actions (e.g., schedule a demo)
- Score and prioritize leads (e.g., Einstein Lead Scoring)
- Recommend offering a consultation or demo as a call to action



## AI Marketing Assistants

### Accelerate campaign planning, targeting, and performance tracking

#### Use Cases

- Recommend campaign strategies and sequence logic (e.g., nudging webinar invites)
- Write email subject lines and copy with generative AI
- Analyze bounce and open rates to improve performance
- Suggest ideal audience segments
- Automate A/B paths (e.g., for event follow-ups)
- Recommend content assets based on conversion potential
- Offer calls-to-action like booking with a rep or event invite



## AI Customer Service Agents

### Handle routine requests while helping agents focus on what matters

#### Use Cases

- Triage tickets and respond to FAQs via Einstein Bots
- Summarize case history before agent hand-off
- Suggest help articles during live chat
- Recommend solutions based on similar past cases
- Route tickets by urgency or category
- Offer tier-2 support meetings for complex issues



## Ecommerce AI Assistants

**Enhance customer engagement across digital and retail storefronts**

### Use Cases

- Recommend products based on browsing or purchase history
- Answer questions about orders, delivery, or returns
- Suggest upsells during checkout
- Personalize offers based on real-time behavior
- Invite VIPs to exclusive events or personal shopping sessions



## Collaboration AI Assistants

**Keep teams aligned with shared data and task summaries**

### Use Cases

- Summarize threads tied to deals or campaigns
- Capture and log meeting action items in Salesforce
- Align teammates on shared accounts and tasks
- Generate daily or weekly customer activity briefings



## AI Analytics Assistants

**Deliver insights on demand—no SQL or manual reporting needed**

### Use Cases

- Query CRM data in plain language (e.g., “How many leads converted this month?”)
- Auto-generate dashboards or summaries
- Suggest automation flows based on performance trends
- Detect data gaps or inconsistencies
- Support rule and permission configuration



## AI for Developers and Admins

**Streamline org maintenance, documentation, and code development**

### Use Cases

- Generate Apex classes, triggers, and LWC components
- Review and debug code
- Auto-generate unit test classes
- Navigate Salesforce documentation via AI-powered chat

# Spotlight: SUMO — AI-Powered Customer Engagement Platform for Salesforce

*Turn your Salesforce into a hub of intelligent action — not just a place for data entry.*

SUMO is an AI-powered customer engagement platform built natively for Salesforce. It delivers a suite of intelligent assistants that transform customer interactions into real action—directly within your CRM.

From booking the initial meeting to sending timely follow-ups, SUMO automates the manual tasks that slow teams down, allowing your reps to focus on what matters most: building relationships and closing deals.

## Appointments

Let customers book time without back-and-forth emails. SUMO automatically finds the right availability, assigns the right rep based on role or location, and sends confirmations or reminders — all in Salesforce.

## Agentforce Assistants

Free your team from manual prep. AI handles scheduling, researches leads, builds agendas, takes notes, and writes follow-ups — all inside your Salesforce records.

## Events

Easily manage signups for tours, info sessions, and workshops. SUMO handles registration, updates attendee records, and sends follow-ups 4 no spreadsheets or third-party tools required.

## Field Sales

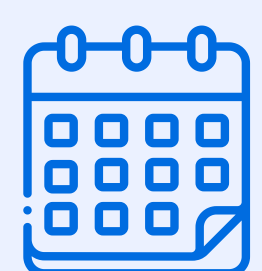
Keep your reps' calendars full and optimized. Customers can self-schedule visits, while SUMO minimizes drive time with smart routing and avoids double-booking in real time.



# SUMO AI Agents: Transforming Customer Engagement in Salesforce

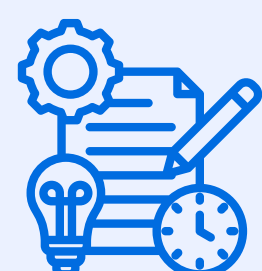
*AI meeting assistants that turn every interaction into an opportunity.*

SUMO's AI-powered agents bring workflow automation and intelligence into the heart of Salesforce, so you can build smart customer journeys.



## Agentforce Meeting Booker

Let customers schedule meetings instantly via AI chat, email, or your website. Internally, reps can book meetings directly from their Salesforce records or inbox.



## Pre-Call Planning Assistant

Automatically researches professional public lead information, pulls customer history, recent interactions, and key insights. Suggests call agendas and tailored questions so your team walks in prepared.



## Note Taker Assistant

Captures live meeting notes and transcripts, associates them with relevant Salesforce records, and makes them easily searchable — so nothing gets lost.



## Follow-Up Assistant

Writes personalized follow-up emails based on meeting context, notes, and outcomes — helping reps stay responsive without lifting a finger.



## Meeting Inbox

Send calendar invites and manage availability directly from Salesforce or your connected email — no tool switching, just seamless scheduling.

# SUMO AI Assistants Works Where You Do

***Native by Design. Productive by Default.***

SUMO's intelligent assistant works inside your Salesforce, helping teams focus on actions that drive outcomes while maintaining full compliance and data security.

- Engage prospects via SUMO Agentforce chat to qualify and book meetings
- Schedule appointments based on capacity, routing logic, and user roles
- Automate appointment self-booking, reminders, and follow-ups
- Research leads and companies ahead of meetings using public professional data
- Generate meeting agendas, talking points, and discovery questions
- Capture real-time notes and action items with an AI meeting note taker
- Draft and automate personalized follow-up messages after meetings

## Summary and Next Steps

AI in Salesforce is not a distant vision—it's here. But not all tools are created equal. Native tools like SUMO deliver the highest ROI through better security, deeper integrations, and smarter workflows


Whether you're a sales leader aiming to shorten the sales cycle or an admin managing growing CRM complexity, AI agents help you focus on what really matters: engaging customers and moving work forward.

## Get Started

**Want to explore how SUMO can boost productivity for your Salesforce team?**

**Request a Demo**

## Contact Us

 800.708.1790

 Book a call

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