

# 5 Key Mindset Shifts For Building Agentforce Experiences



# Forward looking statements

salesforce

This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, anticipated growth and industry prospects, and our strategies, expectation or plans regarding product releases and enhancements. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, results or outcomes could differ materially from those expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: our ability to meet the expectations of our customers; uncertainties regarding AI technologies and its integration into our product offerings; the effect of evolving domestic and foreign government regulations; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including related to AI and Agentforce; our ability to execute our business plans; the pace of change and innovation in enterprise cloud computing services; and our ability to maintain and enhance our brands.

Last updated: September 10, 2024

salesforce

THANK  
you

How many of you work on a web portal?

And how many of you have a leadership team asking  
how you're going to *agentize* it?

# Hi! Great to meet you!



**Emily Winslow**

Director, AI Product  
Management, Customer  
Success, Salesforce



**Nimma Bhusri**

Product Design Lead,  
Next Gen Messaging,  
Salesforce

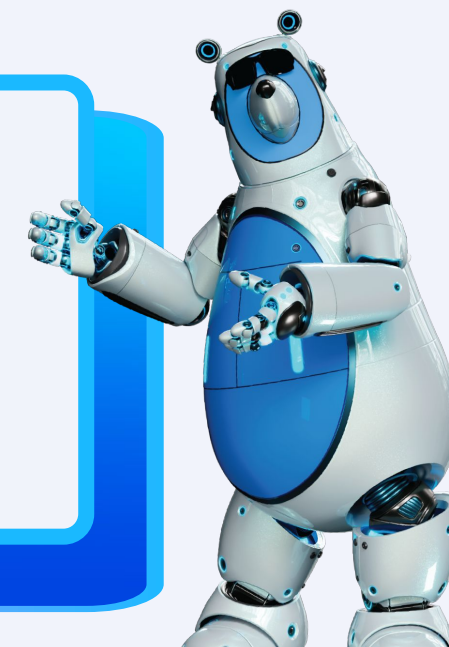
# Our Leadership Ask:

salesforce

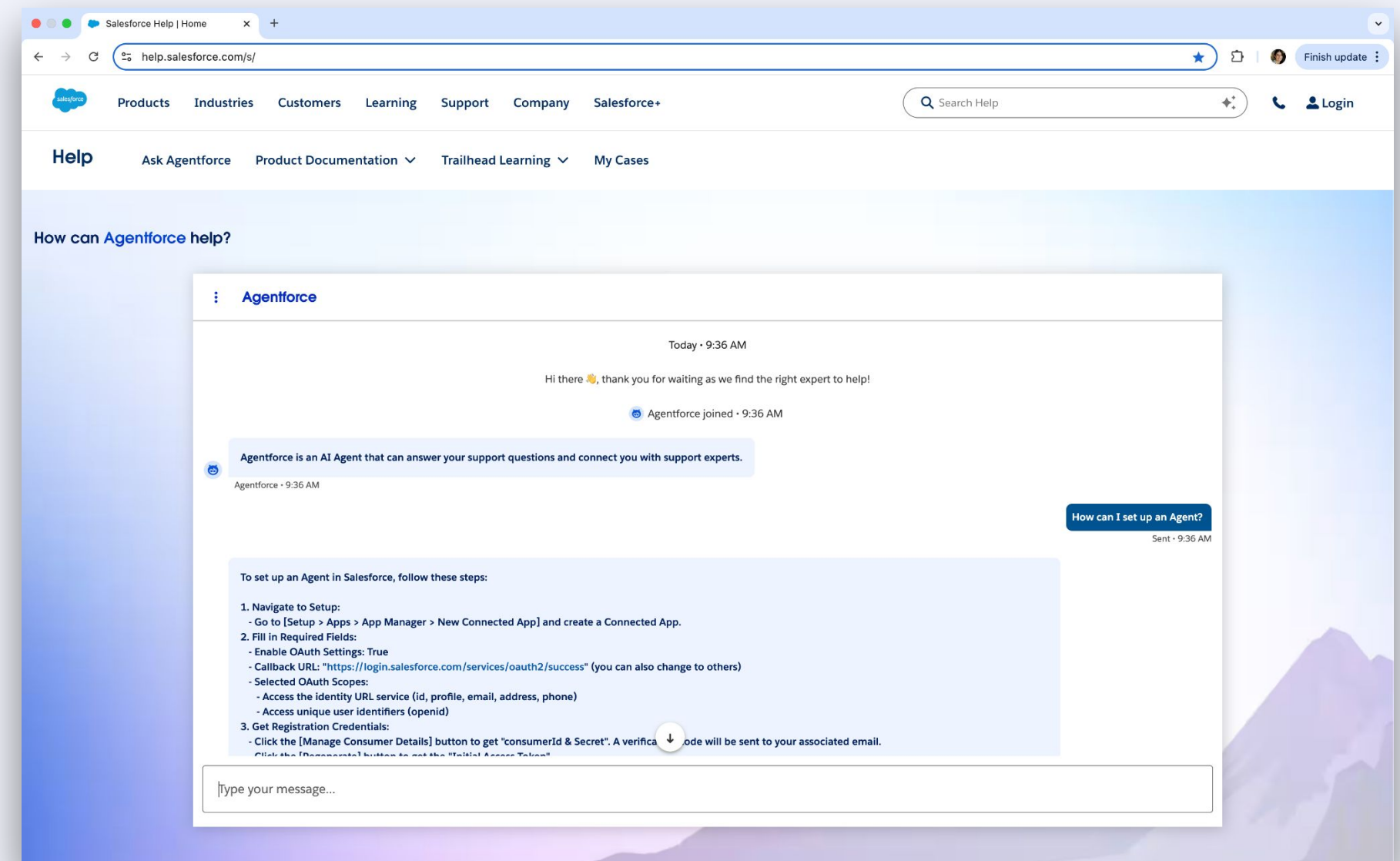
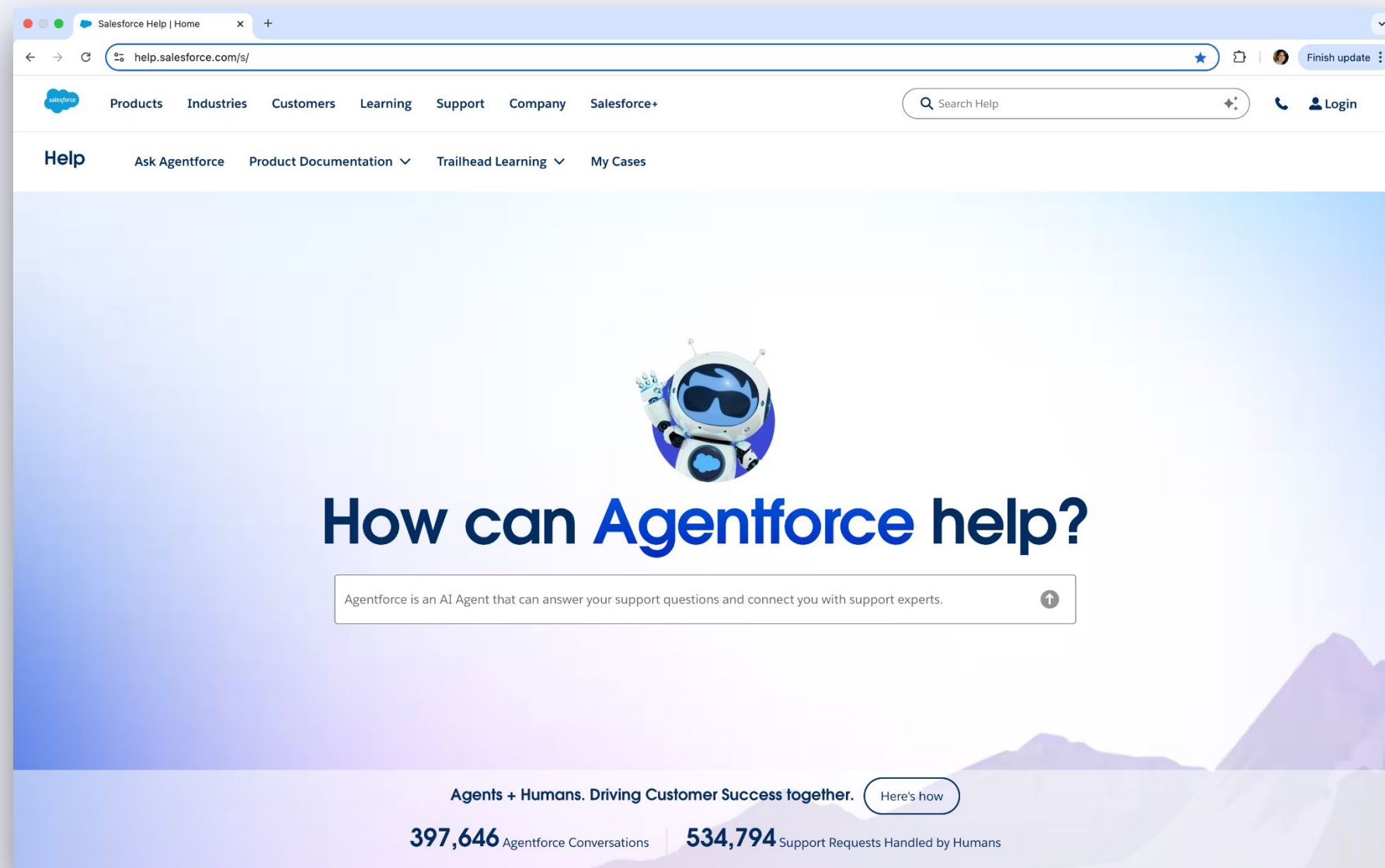
**Integrate Agentforce into Salesforce Help AND make self-service easier for customers experiencing an issue**

Leadership gave us clear parameters: Redesign the UI & Prioritize Customer Zero

**And you've got 5 days!**



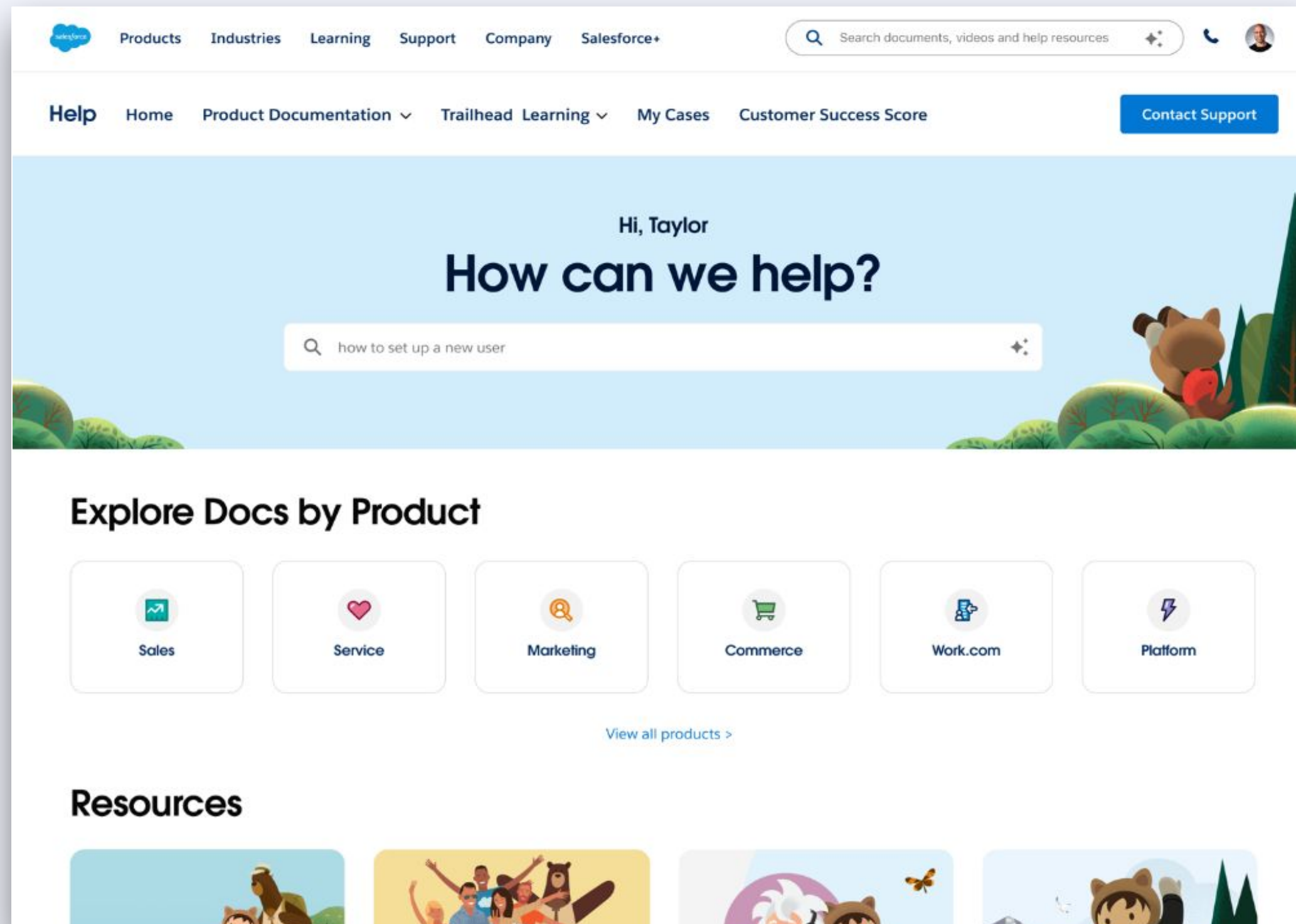
# Good news, we did it! 🎉



• Check this experience out for yourself at [help.salesforce.com!](https://help.salesforce.com/)

# Our Starting Point: Salesforce Help

salesforce



## Customers come to Help:

Looking for information  
**60M** Visits per year

Sifting through content  
**755K** Support articles

Seeking to talk to human  
**2M** Support cases are created every year

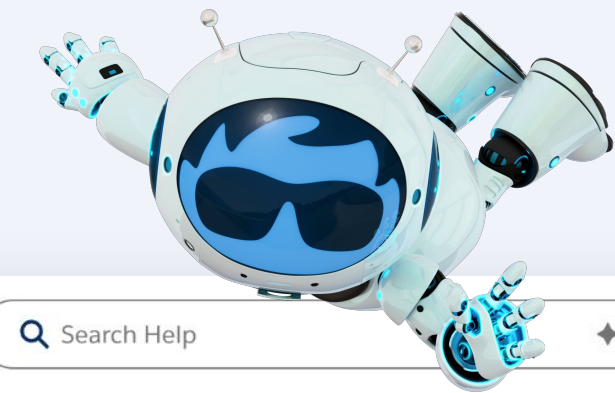
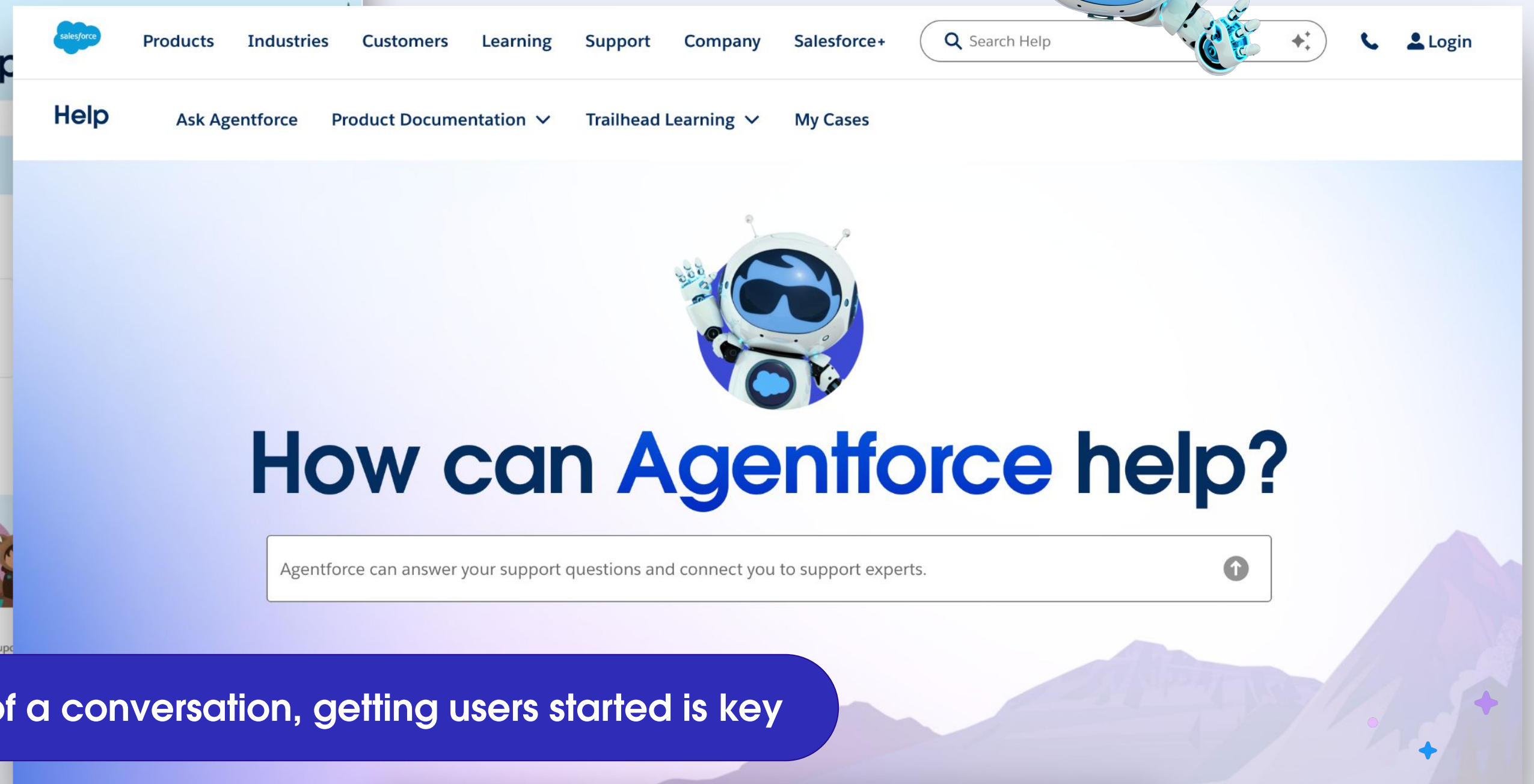
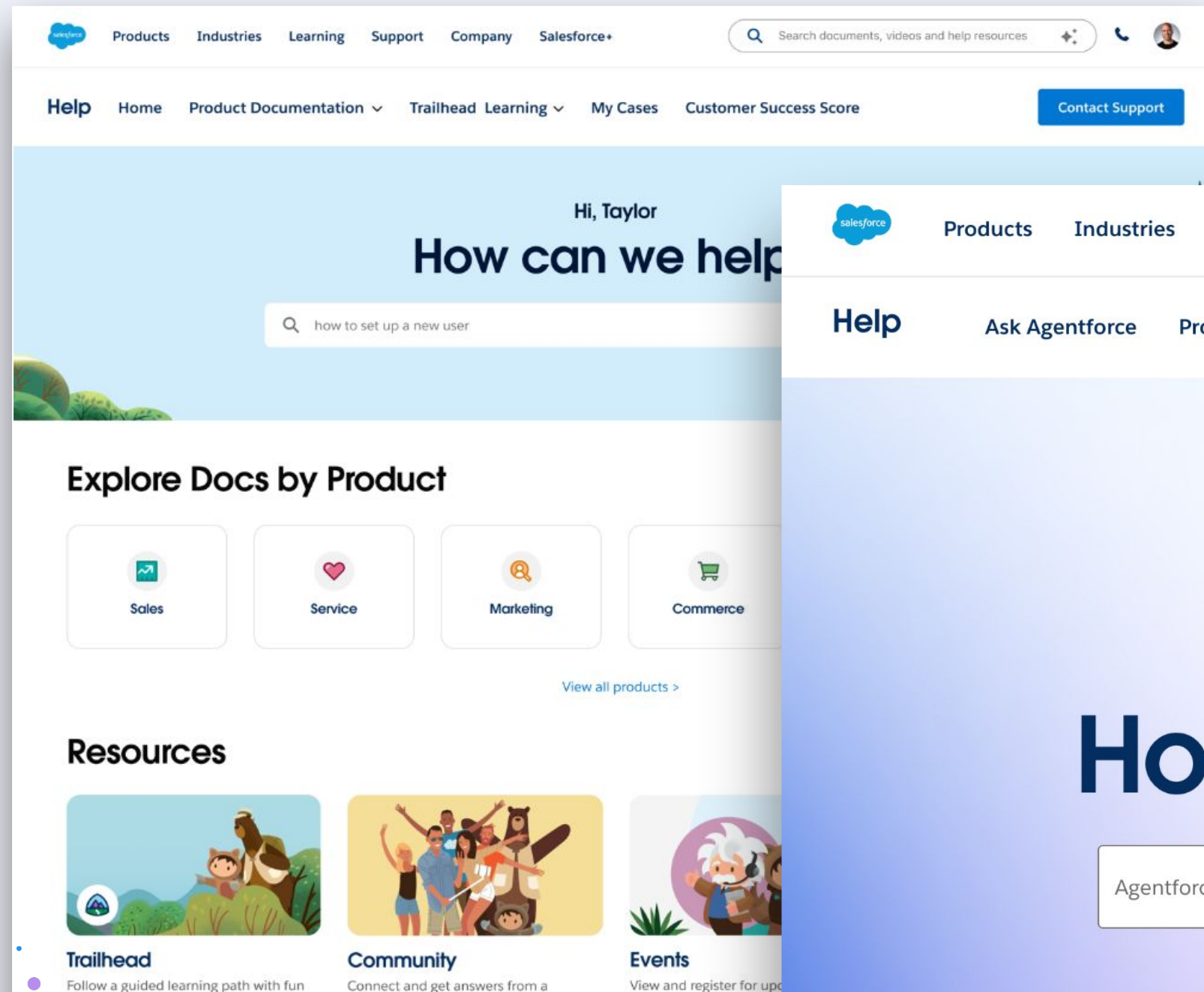
Traditional support portals make customers work too hard to find solutions

# Mindset Shift #1

From Navigation  
to Conversation

From Navigation to Conversation

# Technical Shift of Interface and Interaction Model



When clicks become turns of a conversation, getting users started is key

# Mindset Shift #2

From Content  
Management to  
Knowledge Engineering

# Technical Shift of Your Information Architecture



## Grounding Content

755K

Support Articles

12+

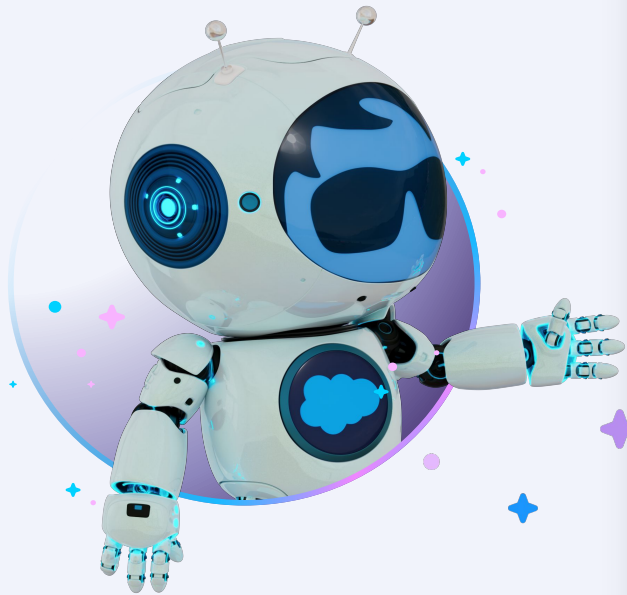
Authoring Teams

85+

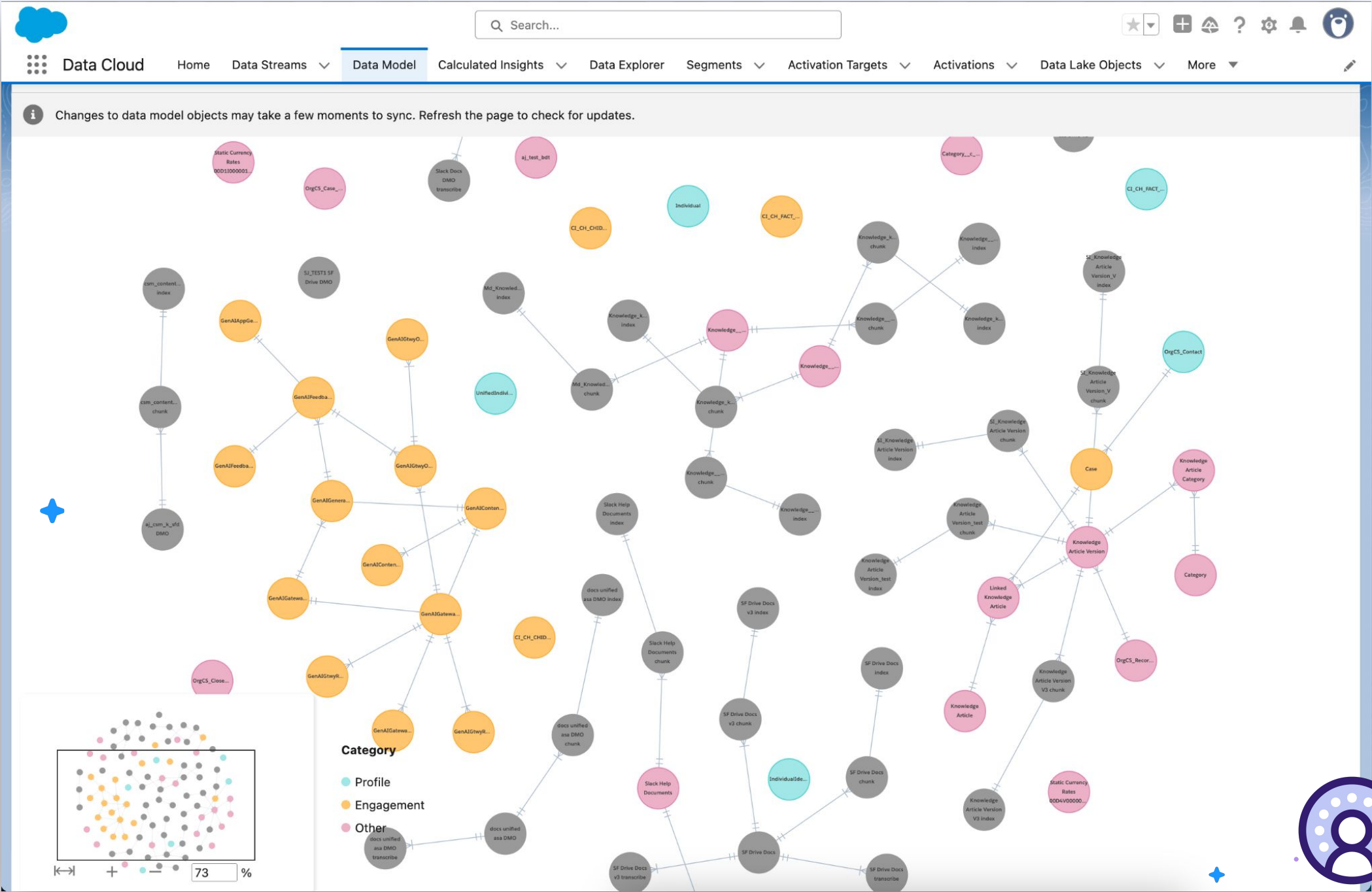
Products

17

Languages



## Data Cloud - Data Model Objects Graph



# Mindset Shift #3

From Siloed Specialist  
to Cross-Functional  
Coalition

# Organizational Shift of How Teams Work Together

salesforce

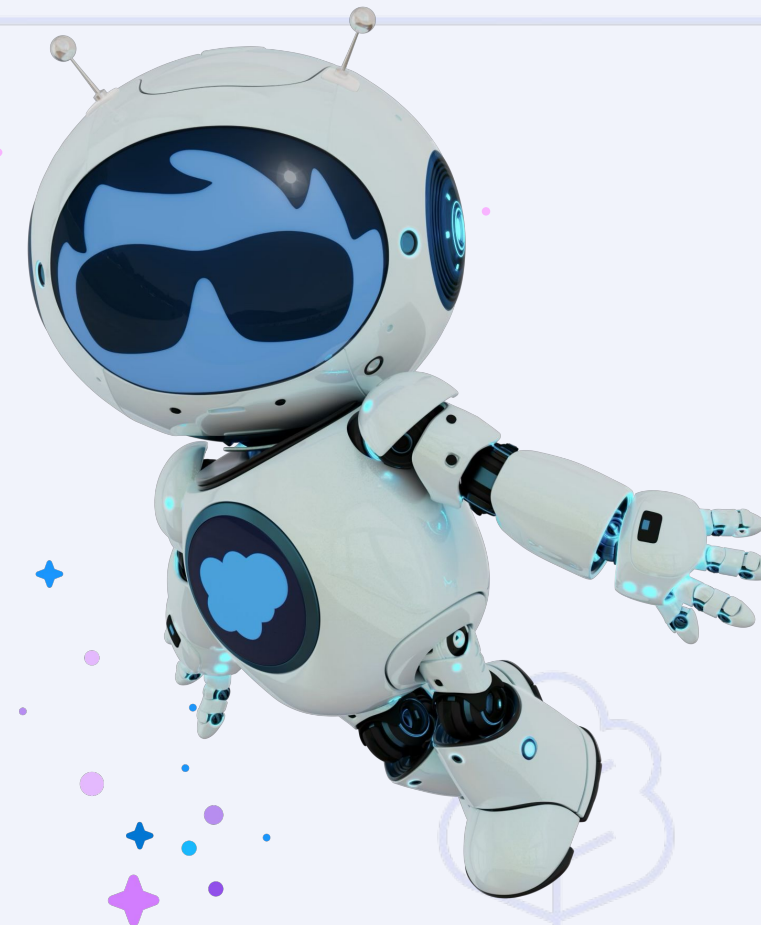
**Team 1**  
MIAW - Messaging  
In-App & Web

+

**Team 2**  
Customer Success

=

**One Team, Overnight**



From Siloed Specialist to Cross-Functional Coalition

# Tooling Shift to Hyper-Simplicity



Figma - Design Spec

Google Sheets -  
Feature Prioritization

Slack - Our  
Everything Place



Keep tooling simple and focused on the utility for the team

# Mindset Shift #4

From User Interface to  
Flexible Engagement

# Experience Shift of Relationship with Customers



ProductsIndustriesCustomersLearningSupportCompanySalesforce+

Search Help

Login

HelpAsk AgentforceProduct DocumentationTrailhead LearningMy Cases

How can Agentforce help?

Agentforce

Agentforce is an AI Agent that can answer your support questions and connect you with support experts.  
Agentforce · 10:47 PM

How do I merge two contact objects?

To merge two contact objects in Salesforce, follow these steps:

1. Navigate to Contact Merge:
  - In Salesforce Classic, click on the "+" symbol on the top right corner and then on the next page click on "Contact Merge."
  - In Salesforce Lightning, click on the App Launcher in the top left corner. In the Quick find box, type in the word "Merge" (but don't click on enter) and click on "Contact Merge."
2. Find Duplicate Contacts:
  - Click "Search Contacts" to search by Contact name. You can use an asterisk (\*) as a wildcard, for example, "L\* Jones" finds both Larry Jones and Lawrence Jones.
  - If you have set up Matching Rules and Duplicate Rules or Duplicate Jobs, click "See Duplicate Contacts." Select the Duplicate Record Set you want to merge.
3. Select Contacts to Merge:
  - Select up to three Contacts to merge.
  - Click "Next."
4. Choose the Master Record:
  - Select one Contact as the Master Record. The Master Record determines which Account record the Contact will be associated with after the merge. Contacts you don't select will be deleted.
5. Select Field Values to Preserve:
  - Select the field values from any record to preserve in the final merged Contact. Unselected fields will be overwritten. For example, if two

Type your message...

ersLearningSupportCompanySalesforce+

Search Help

Login

DocumentationTrailhead LearningMy Cases

SALESFORCE HELP > DOCS > NONPROFIT SUCCESS PACK (NPSP)

Find and Merge Duplicate Contacts

Use Contact Merge to find and merge duplicate constituent records.

NOTE Watch the Nonprofit Salesforce How-To Series video: Merge Duplicate Contacts

- **About Contact Merge**  
Use Contact Merge in NPSP to easily merge duplicate Contacts into a single record. With Contact Merge, you choose which Contact to keep and what data to preserve from each duplicate.
- **Merge Duplicate Contacts**  
Merging Contacts is an irreversible process that combines up to three records into one. One of the merged records is kept, and the other records are deleted. We recommend that only System Administrators merge Contacts.

**About Contact Merge**  
Use Contact Merge in NPSP to easily merge duplicate Contacts into a single record. With Contact Merge, you choose which Contact to keep and what data to preserve from each duplicate.  
Unlike standard Salesforce merge, NPSP Contact Merge merges Accounts in certain circumstances. For example, if you have no Contacts, NPSP Contact Merge merges the two Accounts, re-parents all the related records from the empty Account, and deletes the empty Account.

Search Contacts to search by Contact name. You can also click **See Duplicate Contacts** to view duplicate records. For both options, you merge duplicate Contacts into a single record. NPSP only supports merging Contacts with Contacts, not Contacts with Leads.

In addition to Contact Merge, we recommend the following best practices for duplicate management and prevention:

- Train users to search for Contacts before entering new ones. Consider customizing search layouts to give users

Agentforce

should merge Contacts, as the process is irreversible and requires specific permissions.  
  
For more detailed information, you can refer to the Salesforce documentation on "Merging Duplicate Contacts" ([https://help.salesforce.com/articleView?id=sfdo.npsp\\_merge\\_contacts.htm#npsp\\_merge\\_duplicate\\_contacts](https://help.salesforce.com/articleView?id=sfdo.npsp_merge_contacts.htm#npsp_merge_duplicate_contacts)).  
  
Would you like to know more about any specific step?  
Agentforce · 10:48 PM

Type your message...

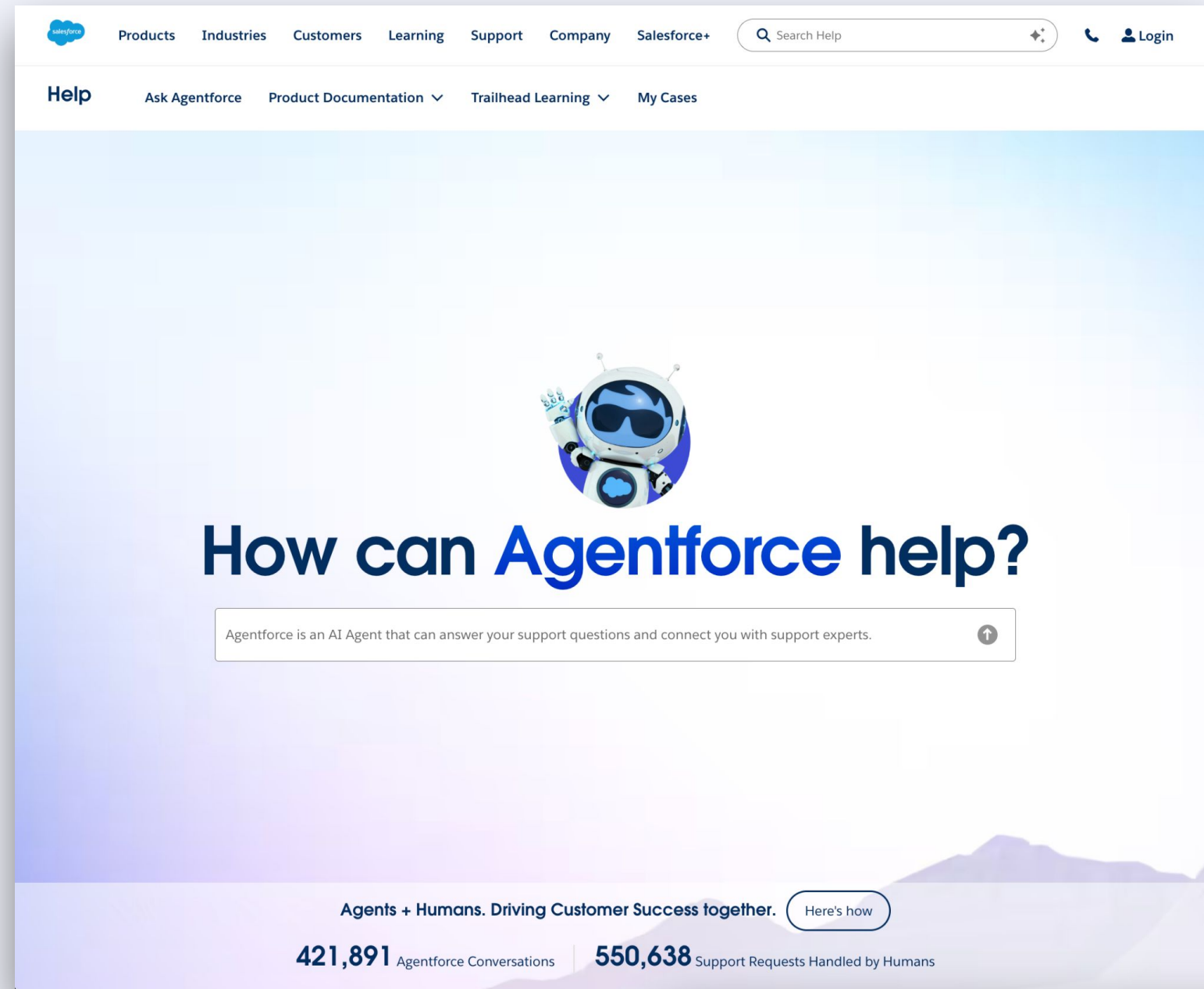
Conversation context passes to the messaging surface on any site page

# Mindset Shift #5

From Building Features  
to Designing Outcomes

# Strategic shift of overall approach and philosophy

salesforce



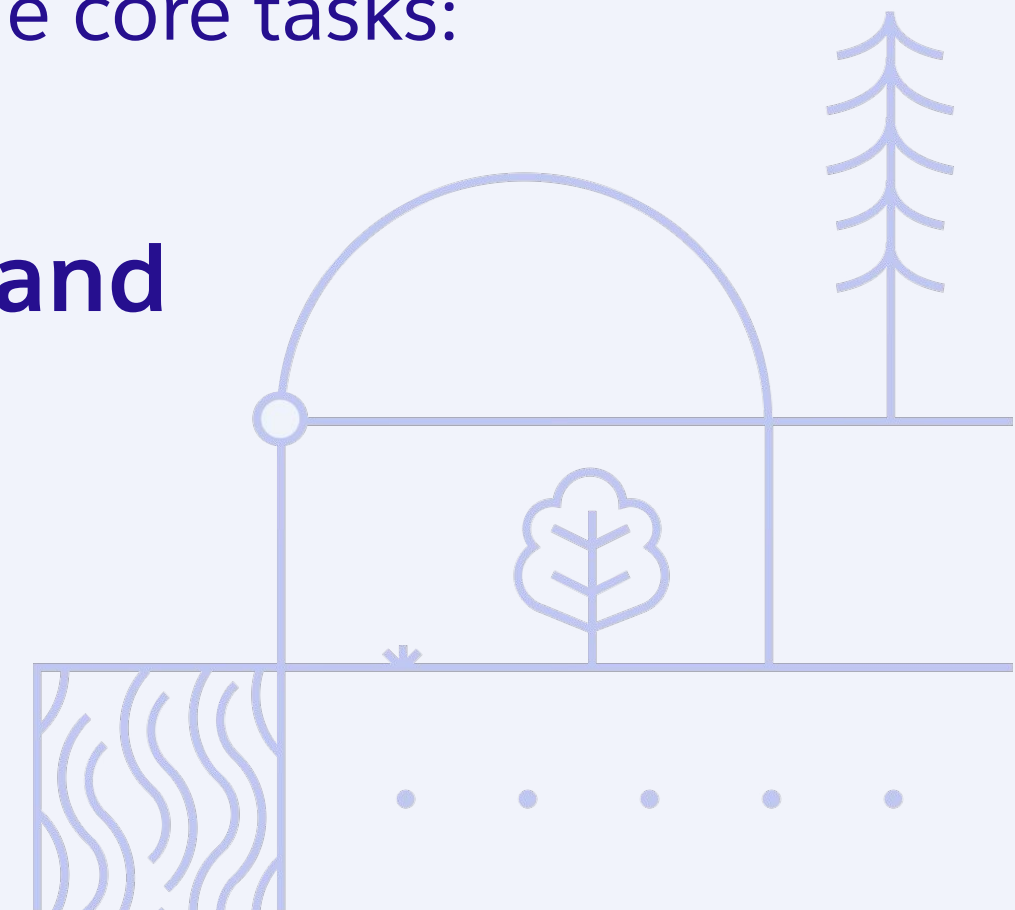
What do users need to be successful?

What does data tell us about their patterns?

What warrants keeping?

By simplifying the experience, we make space for the user to focus on the core tasks:

Finding information and resolving issues.

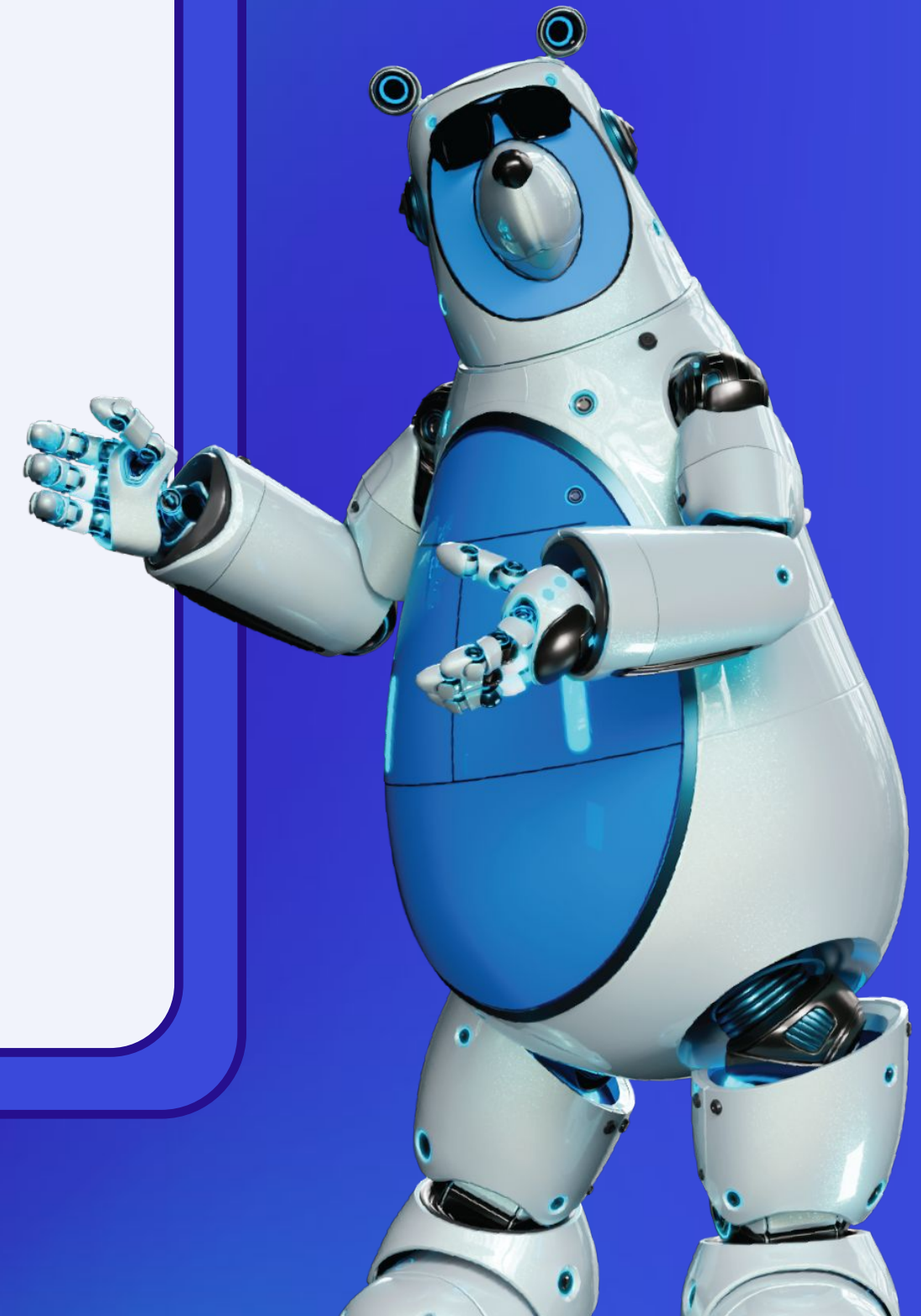


# New Technology, New Mindset

Building an Agentic Portal experience requires shifting from:

1. Navigation to Conversation
2. Content Management to Knowledge Engineering
3. Siloed Specialist to Cross-Functional Coalition
4. User Interface to Flexible Engagement
5. Building Features to Designing Outcomes

*How is your mindset changing to meet  
this moment in technology?*



THANK  
you

# Coffee on us.

The first 800 Trailblazers to provide feedback on this event will receive a \$5 Starbucks gift card.\*

- 1 Download the Salesforce Events app.
- 2 Scan the QR code or navigate to My Event, then My Surveys.
- 3 Take (4) Session Surveys and the Event Survey (available on Thursday).
- 4 Redeem your gift card at Badge Pickup on Thursday.

\*Restrictions apply. See terms and conditions at [sforce.co/survey-terms](https://sforce.co/survey-terms)

