

The background of the entire page is a dark blue, high-tech aesthetic. It features a hand in the lower half, with the index finger pointing upwards towards a glowing, stylized robot head. The robot head is composed of white and blue lines, with two circular eyes and a central glowing point. Above the robot head are two speech bubbles, also outlined in white. The background is filled with faint, glowing blue circuitry and data lines, creating a sense of digital connectivity and artificial intelligence.

OSF | DIGITAL

OSF Point of View: Agentforce Capabilities, Use Cases, and the Competitive Edge

PART II

osf.digital

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Introduction

Agentforce

In Part 1 of this white paper, we explored what Agentforce is, how it works, and how the agents are built. Now, we take a closer look at how it enhances customer engagement by integrating advanced features directly into the platform. For businesses considering this solution, it's important to evaluate its usability, implementation, ROI potential, and competitive advantages.

This white paper explores Agentforce's capabilities and highlights real-world applications across industries. We examine how Agentforce stands in the competitive landscape, identifying key differentiators and areas for consideration. Additionally, we show how OSF Digital helps businesses implement and scale this technology. With clear use cases and a proven deployment strategy, we'll demonstrate how Agentforce simplifies operations, enhances customer satisfaction, and maximizes your existing Salesforce investment.

Explore this comprehensive overview to understand Agentforce's role in the future of AI-powered business solutions.

What Agentforce Can Do: A Capability Overview

Agentforce represents an exciting leap forward in AI-driven customer engagement within the Salesforce ecosystem. To understand its true potential, it's important to critically evaluate its current capabilities alongside its future possibilities. Below, we explore five key dimensions—usability, interoperability, ease of implementation, ROI potential, and security compliance—that highlight how Agentforce leverages the Salesforce platform to drive business outcomes while addressing existing challenges:

- **Usability and user experience**

Agentforce's interface allows business users to configure agents in initial setup. For those agents to be effective though, it relies on excellent actions which tend to quickly go beyond the business user in admin, code and integration requirements.

- **Interoperability with current ecosystem**

Agentforce's ability to reuse a lot of standard Salesforce platform features such as Flows, Apex, the Lightning UI, makes it familiar territory for many consultants. The ability to quickly use data already in the core platform or data cloud is very important to it being capable out of the gate.

- **Ease of implementation**

Due to the reuse of standard platform features and interface, ease of implementation with a partner like OSF is good. The agents get more capable and powerful with access to high quality data, and more effective actions, via integration. This can quickly expand scope of agent implementation.

- **Likelihood of ROI on business cases**

The business case for agents is strong in theory. Much greater deflection of human work being taken by agents either creating cost management or allowing humans to create more revenue per employee. Agentforce outcomes will need further validation though initial customers and trials look very positive.

- **Security & Compliance**

With AI there is always fear on compliance and security. The trust layer goes a long way to settle that, as does the use of existing sharing and permissions structure in the platform. The more regulated the industry, the more scrutiny / testing of agents will be required to tune any minor hallucinations.



A Closer Look at the Competition

The competitive landscape for AI and agent-driven tools is diverse, with players offering a range of capabilities targeting specific use cases, generic AI functionalities, or multi-task integrations. Let's examine key categories of competition and how they measure up:

- **Specific use case agents**

These third-party tools, such as Aomni Inc. for B2B research or Jarvis for smart home automation, as well as many coding assistants excel within their narrow domains. While effective in their respective areas, these solutions lack the broader business application and flexibility that Agentforce offers.

- **Generic AI wrappers**

There are many agents that are fundamentally Open.ai based and offer some form of wrapper for Open AI, such as AutoGPT and AgentGPT. While these tools focus on tasks like text, image, and video generation, they don't compete with Agentforce, as they lack the necessary business context, data integration, and actionable capabilities that Agentforce provides.

- **Multi-task integration agents**

Multi-task integration agents are a little more interesting in that they can chain together several applications to automate, with AI, some interesting tasks. While these agents are primarily designed for personal assistance rather than business applications, there's potential for them to evolve into more business-centric solutions, much like an AI-enhanced version of Zapier. Examples include tools like Gemini, Multion, and Apple's Intelligence.

- **Vendor solutions**

Offerings like IBM's WatsonX, Google Cloud Platform, and Microsoft Azure provide powerful toolkits but require significant engineering to integrate existing systems and data. Agentforce has an edge here with its built-in AI governance and availability of platform data, reducing the complexity and time to deploy business-ready solutions.

Niche Competitors

When narrowing down to more niche competitors, some solutions come closer to Agentforce's domain, but clear distinctions remain:

- **Pega**

Pega has been successful in automation and SFA space. While it remains a complex platform, Pega is now introducing AI through its Blueprint tool to automate workflows, moving closer to an agent-based approach. Although the platform's ecosystem of connectors is somewhat limited, it still poses potential competition to Agentforce in certain areas.

- **Mendix / Appian / OutSystems**

Mendix, Appian, and OutSystems are low-code, enterprise integration platforms that align more with Salesforce itself than with agent-based solutions. However, they do offer similar capabilities, such as seamless integration, fast deployment, and the use of AI to automate processes and boost productivity. As the boundaries between platforms continue to blur, it's easy to envision how agent-based solutions could emerge within these platforms as well.

- **ServiceNow App Engine / Now Assist and Zendesk Sunshine**

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- **Kore.ai and Cognify**

Kore.ai and Cognify are bringing AI tooling to the forefront of process and using Agents to power experiences. Cognify focuses primarily on call centers and customer service, while Kore.ai takes a more generalist approach. However, even Kore.ai's bots are still largely path-oriented, resembling traditional chatbots, rather than leveraging AI-powered reasoning like Agentforce.



Agentforce & Wider Ecosystem

Agentforce is Salesforce's solution to AI.

How will Agentforce interact with the wider set of platforms in the future?
The answer is in agents speaking with agents and a wider ecosystem connection.

Salesforce Agents

Agent inside Salesforce working on specific topics, engages with customers, and identifies the necessary actions to be taken.

Actions connect to 3rd party systems via API to execute tasks

Will become...

Salesforce Agents

Agents continue to execute topics and actions as they did before.

3rd Party Agents

Now we connect to other autonomous agents using AI

Key Takeaways: Agentforce Capabilities and Competition

Capability

Agentforce builds upon Einstein Copilot, released in March 2024, offering a more mature version of the technology and ecosystem.

- Better structure for Topics and Instructions with more opportunity for guardrails.
- Upgraded reasoning engine for more accurate results on topics.
- Leveraging the solid platform foundations of Flow, Apex, and other core Salesforce components.

Future Roadmap

Looking ahead, the continued evolution of the ecosystem will be shaped by collaboration across Data Cloud, Agentforce, and its partners, fostering accelerated growth and innovation. Here's what to expect as this dynamic landscape unfolds:

- Many partner-led action libraries will emerge, expanding the capabilities of Agentforce.
- Ongoing delivery of out-of-the-box (OOTB) actions and features from Salesforce, aimed at driving faster adoption.
- An increasing focus on building not only actions but also the necessary prompting skills to enhance agent effectiveness.

Maximising Capability

To fully maximize the potential of Agentforce, adopting a comprehensive platform approach is essential:

- Use of rich data in CRM will make agents much better.
- Use of data outside of CRM via Data Cloud will add capability and accuracy.
- Availability of integrations to 3rd parties will make agent actions much more effective.

Competition

Competition in the autonomous agent space is set to explode over the next 12 months as more businesses enter the market. Key trends to watch include:

- No-code and low-code automation platforms will begin adding agents.
- Specific domain products (like Zendesk or Mailchimp) will incorporate AI and agent-like features.
- However, none will have the data and platform advantages of Salesforce, and many will lack the critical trust layer that Salesforce provides.



Agentforce Use Cases: Enhancing Customer Experiences

When exploring how Agentforce can benefit your business, it's useful to consider how it can be applied across different scenarios. The following examples showcase a range of business use cases, all of which can be executed via chat, voice, WhatsApp, and more.

Order Management

- **Cancel an order:** Ensures cancellations align with business rules and logic.
- **WISMO (Where is my order?):** Not just an order status check, but a real-time update by calling the right carrier API.
- **Order search:** Customers can locate recent orders using natural language, such as “order for a table in the last 6 months.”
- **Quick reorder:** “Can you reorder my last protein bars?” The AI identifies the last order, confirms the address and price, and places the order.

Customer Support

- **Reschedule my appointment to next Tuesday afternoon:** Easy updates without human intervention, respecting business rules.
- **Is XYZ available in store? Please reserve it:** The agent finds the nearest store, checks availability, and reserves the item.
- **Please skip my next delivery of my skincare bundle:** Automates subscription management based on simple language commands.
- **I'd like to make a complaint:** Provides a more intuitive and empathetic interface for submitting complaints.



Product and Service Information

- **Answer frequent questions:** Use of Salesforce knowledge to provide natural language replies based on your knowledge base.
- **Answer product questions:** Armed with your product information, answer troubleshooting or support questions on products.
- **Tell me my mobile phone upgrade options:** Uses customer data and available plans to explain mobile upgrade options.
- **Can you tell me whether I can claim on my drill?** The agent accesses the purchase details and warranty info to confirm eligibility.

Personalized Recommendations and Insights

- **Recommend me a new t-shirt:** A simple product recommendation action based on the customer's past purchase history.
- **Investments of interest.** Compares the customer's portfolio with similar high-performing stocks (compliant with regulations).
- **What's my portfolio performance in the quarter?** The AI checks each of the accounts and summarizes the gains of each.
- **Where have I spent more money this month than usual?** Analyzing spending habits can help customers budget better

Appointments and Scheduling

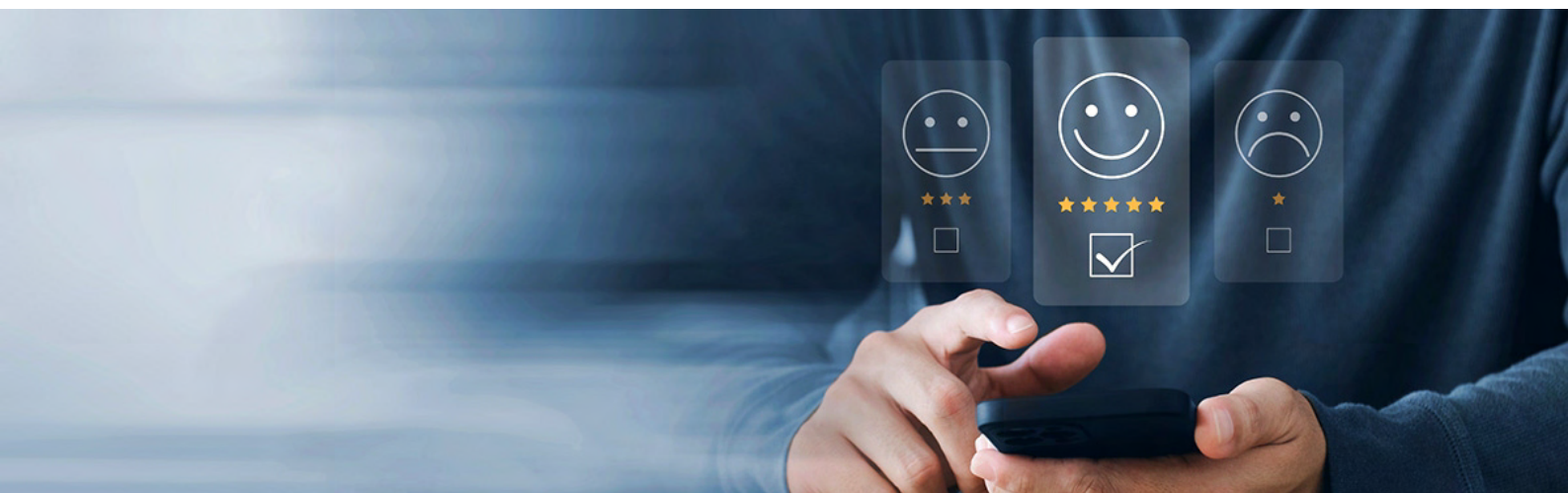
- **What appointments do you have in the afternoon on Tuesdays in the next month?** A quick query – possible to answer with Agentforce.
- **Reschedule my appointment to next Tuesday afternoon:** Simple update, no need to speak to a human, respect business rules.

Payments and Billing

- **Please change my monthly electric payment to \$150:** Respecting business rules, help a customer make a simple change.

Enhanced Customer Experience and Feedback

- **Chat-based surveys:** Instead of the unpopular 1 to 10/stock questions, engage customers in a more dynamic chat format, with AI summarizing sentiment and issues.
- **Natural language applications:** Everyone hates computer forms. Why not do it through chat instead?



Business Use Cases: Transforming Internal Operations

Internal use cases offer significant potential to enhance employee productivity, improve team collaboration, and address tasks that are often overlooked or difficult to manage consistently. There's a few examples below.

Customer Support and Case Management

- **Draft a customer service reply:** Generate an initial reply based on the case details and knowledge base.
- **Summarize a case or account details:** Use AI to quickly provide a summary of the accounts you're working on without manually sifting through records.
- **Monitor surveys for sentiment:** Every day, without fail, analyze all new CSAT surveys for sentiment and potential cases: raise cases where needed.
- **Identify similar success cases:** Find similar customer service cases with good outcomes and how they were solved.
- **Ticket routing with AI:** Identify and route tickets more effectively by analyzing natural language and customer sentiment.
- **Update and expand knowledge base:** Enhance the knowledge base better based resolved cases and emerging trends.
- **Real-time translation:** Enable seamless communication between agents and customers through real-time translation of messages.

Sales Enablement and Coaching

- **Sales coach:** Develop tailored plans to close deals and advance opportunities using existing data.
- **Sales conversation mining:** Analyze a sales call recording for sentiment, action items, and potential challenges.
- **Draft a sales email:** Generate polished emails for introductions, product pitches, or account updates.
- **Find my best opportunities:** Use AI to find a sales rep's best opportunities and summarize them and next steps.
- **Forecast summary:** Create summaries of forecasts, highlighting key changes or concerns.
- **Upselling strategies:** Offer personalized recommendations for upsells, such as phone contracts.



Marketing and Campaign Management

- **Campaign ideas + generation:** Generate ideas and content for marketing campaigns to prevent blank screen starting.
- **Implement a promotion:** Promotion engines can be powerful but click-heavy. Get the AI to do the promotion for you in chat.

Fraud and Pattern Detection

- **Fraud detection:** Auto-tagging of potential fraud on a new level compared to previous predictive detection.
- **Identify unusual patterns:** Spot changes in customer behavior, like increased or decreased sales, personnel updates, etc.
- **Vehicle patterns/telemetry:** Not just emergencies, but different patterns or usage, predictive maintenance, etc.

Marketing and Campaign Management

- **Make a product suggestion:** Suggest optimal next steps or product recommendations for human agents.
- **Summarize energy statements and accounts:** Save agents time on understanding an energy account.

How OSF Can Help: Accelerating Agentforce Implementation

Having a reliable partner to tailor your Agentforce setup is crucial for driving meaningful results. At OSF, we understand the importance of aligning Agentforce capabilities with your specific business needs. Our approach ensures seamless integration and helps you quickly realize value from this advanced platform.

Agentforce Accelerate

Accelerate Agentforce capabilities with a trusted approach for success. Configure and deploy a PoC or first agent with your data which proves business value on your use cases. With OSF's proven expertise, this entire process is completed smoothly and efficiently in just 5 weeks.

Delivered as one predefined common case, this focused approach allows you to showcase the power of Agentforce in a key area without making the process too complex.

Agentforce Accelerate+

Agentforce Accelerate+ takes a more comprehensive view of your agent approach and strategy, folding in readiness, governance and roadmap as well as proof of concepts to prove out the Agentforce value.

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Delivered in 12 weeks, this package includes a readiness assessment, governance plan, roadmap, and two use cases. For businesses seeking a more rigorous and diligent approach to starting Agentforce, we double the use cases and add crucial elements like readiness, governance, and a roadmap to ensure lasting success.

What we've learned so far

TIME IS NOW

Agents are upon us. Salesforce have given us some very interesting tooling which is ready for use. We should act to stay competitive.

- **Acting now on proof of concepts will give huge learnings**
- **Better equip us for full production use cases**
- **Pace of change is higher than ever**

AGENTS ARE THE FUTURE

There's no doubt in OSF's mind that autonomous agents are going to change the way we look at human interaction and work.

- **Natural language is what separates old experiences and humans**
- **That barrier is becoming ever thinner and blurrier**
- **Do you care if it's an agent if it's as easy as a human, or easier?**



OSF is deep in AI

From crafting our own in-house Gen AI development platform, to already having Agentforce pilots, we're already here.

- **AI does need a test and learn approach that OSF has already passed through**
- **We understand the toolset of prompting, RAG, data and integration deeply, to provide maximum value**

Competition is fragmented

Competition to Salesforce's approach is fragmented and often specialized. Their new toolset can open up a lot of possibilities for existing customers.

- **One platform which already has the rich data you need to make AI smart enough to be very effective**
- **A way to bring more data in easily with Data cloud and MuleSoft to truly drive value**

Conclusion: A Strategic Move Toward the Future

The time to act is now. Adopting Agentforce gives businesses the chance to stay competitive while embracing the transformative power of autonomous agents. At OSF Digital, we recognize that the future of work and customer interaction is deeply tied to AI advancements. By leveraging Salesforce's platform, businesses can access the tools, integrations, and data needed to make agents smarter and more effective.

As competition continues to intensify, acting now—not only to adopt AI but to experiment and learn through proof of concepts—ensures that your business is prepared for the future. With OSF's deep AI expertise and a clear understanding of the tools, integrations, and strategies required, we are well-positioned to help you achieve success with Agentforce and beyond.

Ready to transform your business with Agentforce?

[Contact us](#) today to schedule a consultation and see how our tailored solutions can accelerate your AI-driven customer engagement strategy.



OSF Digital is a global leader in digital transformation, specializing in Salesforce solutions that drive operational efficiency and business growth. With expertise in AI and composable architectures, OSF Digital empowers businesses to create seamless, future-ready customer experiences. Leveraging data-driven insights, OSF helps clients enhance performance, optimize processes, and scale for success. From innovative commerce solutions to managed services, OSF Digital is committed to helping companies maximize their digital investments and achieve measurable business outcomes.

Thank You

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