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Agentforce and the Future of Commerce

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Introduction

Al and agents are going to change the world. Over time, they will get smarter, better informed, and more capable. In the domain of commerce, there will be fundamental change. We already have seen many trends emerging even before generative Al came onto the scene with such a bang. Areas such as voice search and communication, social shopping, and on-platform checkout experiences are just a few areas where we see such change. Agents will significantly accelerate these changes.

"Add to this the dual roles agents will fulfill: directly facing the end customer for a great experience 24x7 and assisting internal teams to work with greater and smarter productivity. We'll explore these indepth throughout this white paper."

Keep in mind that agents do not come without their pitfalls and common errors, and these should be examined and mitigated with a clear AI governance framework. AI can still hallucinate, and as a result, so can agents. Salesforce has done fantastic work in giving you the guardrails for agents and the trust layer for data security and privacy. These are an excellent foundation, but they do not absolve us of the need for thorough testing and responsibility.

Agents and an Agentic Future

Before examining the exciting use cases, approaches and safeguards we need for agents and commerce, let's briefly examine what agents are and what an agentic future looks like.

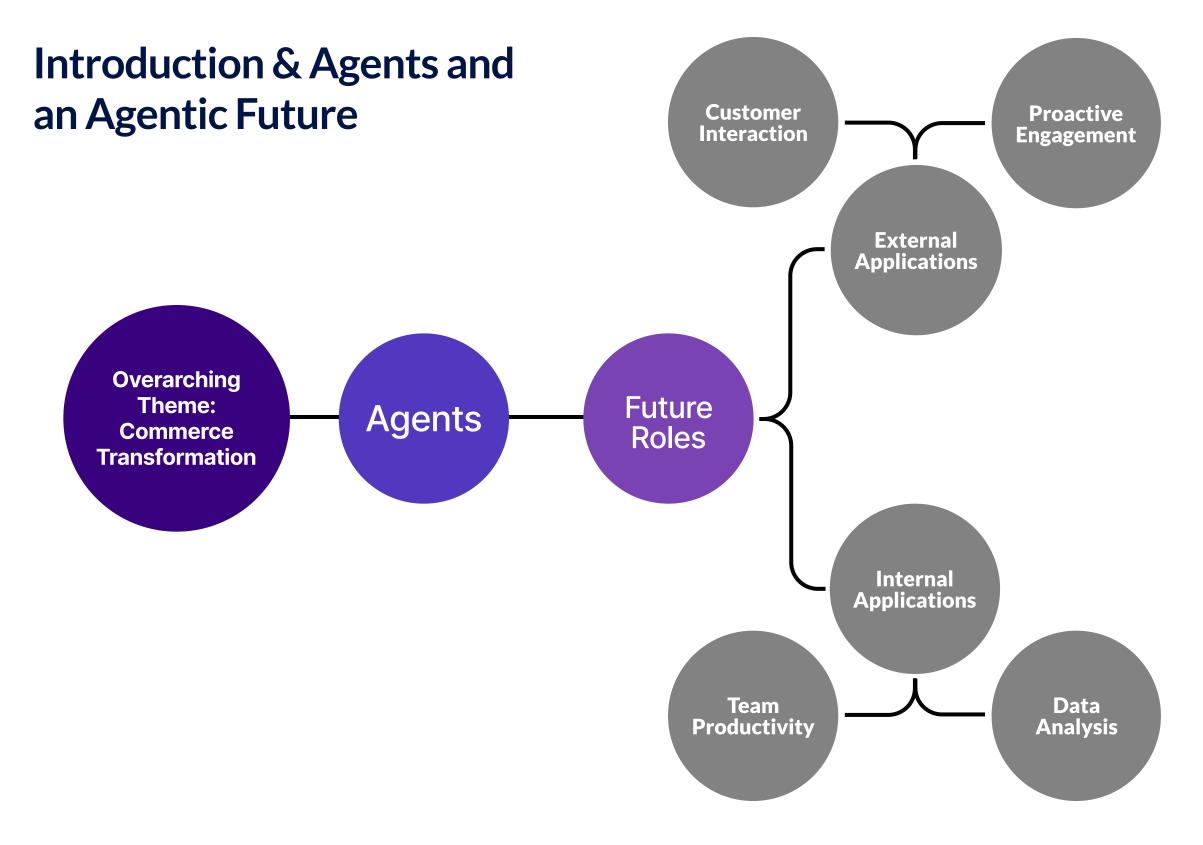
Agents are not the same as bots or chatbots. They carry much greater autonomy, reasoning and ability than a deterministic chatbot. Of course, we do set the limits of

this autonomy and what they can execute. (This will be a key theme in taking advantage of the future). They can show up externally and internally, helping end customers or teams.

They can be reactive to customer input and proactive in examining data and patterns regularly (so humans don't have to). Their scope now and in the future will, therefore, be vast, and they can provide some of the connective tissue an organization currently relies on its humans to provide, where standard systems cannot.

Furthermore, agents will also communicate with other agents inside our own business and from other businesses — just like humans do now.

There are limits to their capability. We see the popular arguments about AI being only as good as it is taught (true) and maybe incapable of 'true' creativity. This is good, as it keeps an important place for humans, and, in a business context, we don't often need these more extreme skill sets. There's a lot of work agents will be able to take off our hands and do more reliably, effectively, and consistently.



Resistance to Agents

Before we dive into use cases, let's explore resistance. We have found that agents often expose fundamental underlying issues that some believe should be fixed before agents can be used to their full potential. This can affect the rate of adoption and learning. Let's briefly explore three slowdown areas before looking toward the right way to enable and start with agents.

Slowdown 1: Data Availability and Quality

First and foremost, we have data. For an agent or any AI to be effective, we must feed it high-quality food. If we don't have good data, the agent will be less capable of providing personalized and accurate responses.

Data quality is critical. If we're talking about use cases like product recommendations, service cases or complaints, not having the high-quality data to answer questions effectively will lead to massive frustration with the process and the AI, creating disillusionment.

The same applies to data availability. You could have a lot of useful data about customers, contracts, products and more, but it's useless if it's not available to the agents. Typical examples are where data has been brought together in data warehouses or data lakes and can only be surfaced through reporting tools or data analysts, but it isn't available to business users or agents.

Slowdown 2: Agent Availability to Take Action

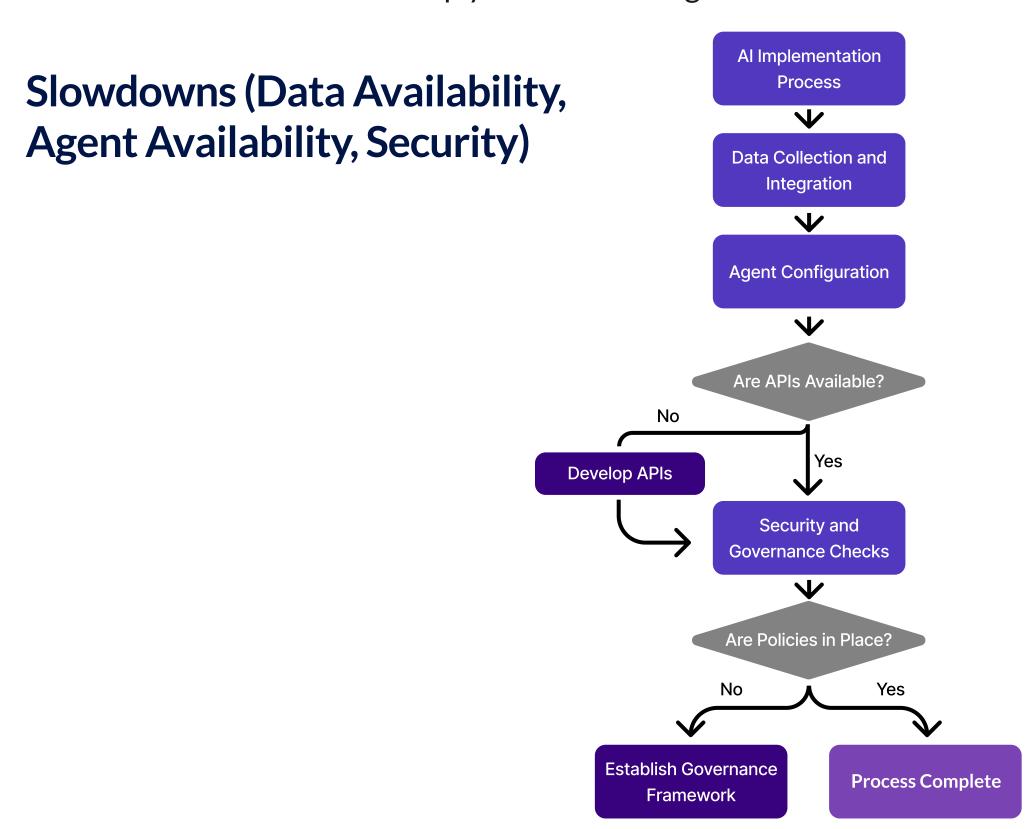
Agents can be very well-informed with data and well-configured, but they need to be able to take action. Taking action means they can do things: cancel orders, edit orders, send recommendations, add comments to cases, and more. These actions can be inside Salesforce itself (which are easier to create and configure), or they can be external actions.

These external actions are driven through integrations and APIs. Having an integration tool such as MuleSoft can accelerate the availability of these actions, but they still require time and planning to execute ahead of agent usage.

Slowdown 3: Security, Privacy and Governance

Security, privacy, and governance are significant topics. We cannot escape some of the horror stories around AI, access to data, hallucinations, and more. It's easy to scaremonger. Using Salesforce and Agentforce gives you the safety net you need to get started. They provide the trust layer, which can be configured to mask PII data before it goes to any AI. It also provides toxicity detection to ensure toxic responses don't go to customers. The audit trail is clear and easy to use. It provides the framework and guardrails so your agents can perform in a safe environment.

All businesses will need to have their own Al governance approach. Maybe it's change boards, committees, appointed leadership or a few of these. It doesn't need overcooking, though. If you haven't tried anything or learned anything yet, then all the theories in the world won't stop you from making some mistakes.



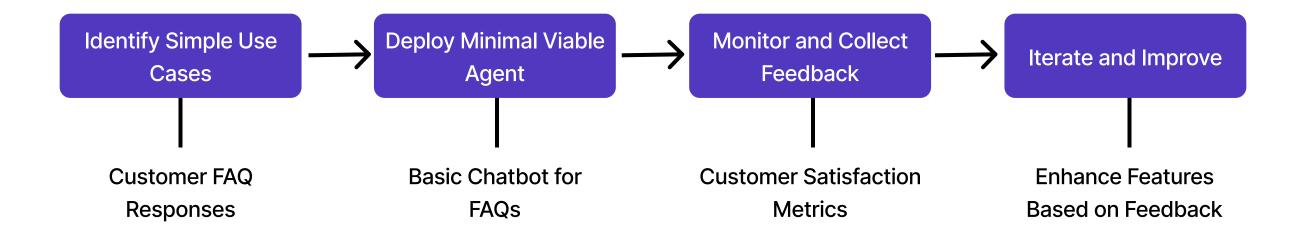
How to Get Started Without Slowdown: Test and Learn

This is one of the most important parts of this whole white paper and the most common mistake of customers when considering AI. They look at what's needed, and all the departments involved internally, and the data issues and integration issues and and and ... they get overwhelmed. They stop and say, "We need to sort out XYZ before we can look at this."

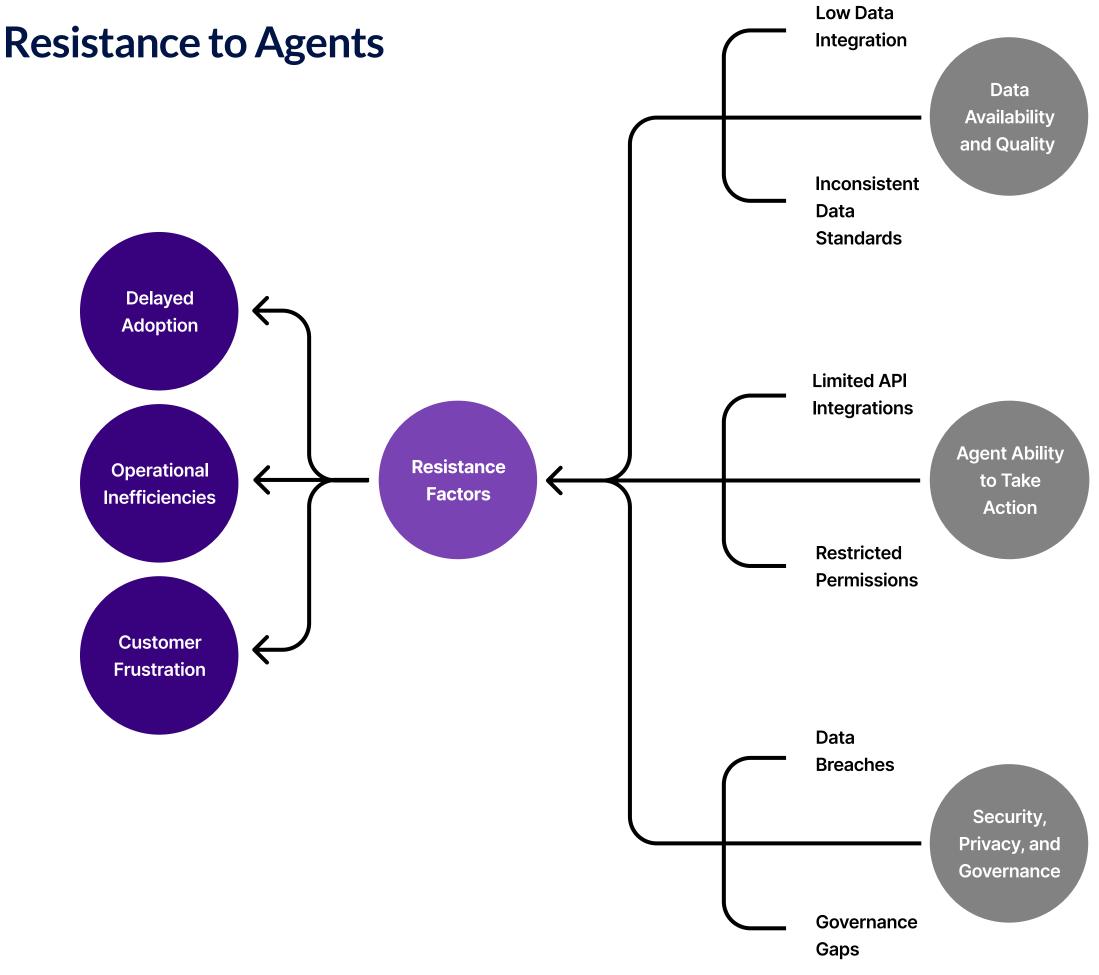
"Six months go by, maybe twelve. The competition has started learning and testing, and you haven't."

In the age of AI, you'll fall behind quickly, and it will be even harder to catch up. We must start because only once you've started can you start to learn, adjust and make things work well.

How to Get Started Without Slowdown



The good news is that simple use cases can be deployed quickly, and the learning can begin. Agents answering customers' questions based on a well-developed knowledge base is an easy and well-understood use case. Start soon!



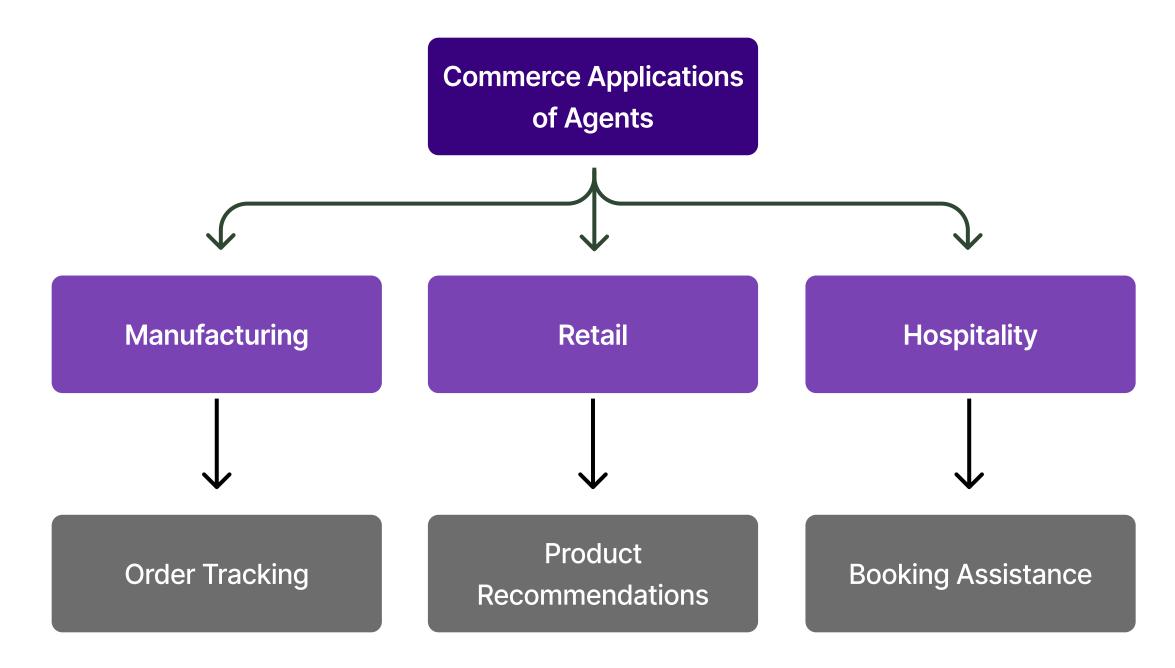
Commerce as a Domain

Very often, when people think of commerce, they think of retail — stores, ecommerce websites, click-and-collect, and so on. This is all commerce, but it covers only a small area of it. There are many more use cases when we break out of the retail-only thinking and look toward areas such as hospitality, events, professional services, manufacturing, distribution, parking, and much more. Fundamentally, we transact wherever we go, whether with direct payments, invoices, orders, sales agreements, or many other ways.

In this white paper, we'll explore way beyond the retail domain to consider the concepts of unified commerce and commerce anywhere, making this valuable reading for a much broader audience than we might expect. In many ways, commerce is the tip of the spear of innovation with customers. We only need to look at the rise of

ecommerce, online ordering, click-and-collect, apps, mobile purchasing, and more to see how commerce leads the way in customer experience innovations, and agents will be no different.

Commerce as a Domain & Use Cases for Agents



Use Cases for Agents

Let's get into the real meat of the discussion. What are the key use cases for agents in commerce? We have all probably seen the use cases on standard customer service. Those are all about case deflection and containment, such as answering questions from a knowledge base. Here, we will be specific to use cases for commerce or commerce-related topics, e.g., orders, agreements, products, etc.

Many of these use cases are very industry-agnostic. It can be a mistake to think of commerce and only think retail. As we said before, commerce is in every industry!

#1: Product Recommendations

Well, we couldn't start without the obvious, could we? Generative AI is getting really

smart about what we have previously taken for granted as an almost 'solved' problem. In this case, recommendations have been Al-powered for a long time. This was the previous generation of Al, which used machine learning and algorithms to determine the likelihood of a match between your previously bought or viewed products and a future purchase. We got pretty good at it, too.

However, it reached a limit, as it was still search and recommendation-based on previous behavior or word matching (fuzzy matching, stems, synonyms, hypernyms, etc.). Now, with generative AI, we can ask completely different types of questions, such as:

"Show me some products that would make a great gift for my mother"

There are two core principles about how agents and these kinds of questions can be so powerful compared to previous paradigms of search:

First: Natural Language Understanding

It may seem obvious now, but generative AI and agents can understand natural language well. As a result, we understand some very interesting combinations of words in one hit. Take the third example above as a good example. On a standard commerce site, you'd probably search 'lightweight jacket' or something like that. If the site is a specialist, it might have some filters to find windproof or a temperature rating. However, many would not, and you'd be stuck looking through the product information and features. You could try searching for 'lightweight items for cold weather that are windproof' in a search, but you likely would get what I got while experimenting with this: nothing!

Now, enter agents and their use of gen Al. Ask any Al chat tool the same question, and

[&]quot;Show me some products that would upgrade my car's interior experience"

[&]quot;Show me products that are lightweight and windproof for cold temperatures"

[&]quot;Show me products I might be running low on based on previous consumption"

see an immediate selection it has gathered. Admittedly, it has collected this from websites it has access to, but the key here is to understand that the AI understands the question at a deep level. Ask it to recommend materials, and it will. You can build this into your agents and backed onto your product set. See how much more creative customers will be. If you target younger demographics, expect this way of thinking about search to accelerate rapidly.

Second: Chaining Existing Knowledge

Quite a few examples above combine existing knowledge about a customer or their orders with the search. This is critical to understand for the future. We have talked about true 1:1 personalization at scale for many years. Gen AI makes this possible with the right inputs.

Let's take an example in the automotive industry. Asking for ways to upgrade your car's interior might seem like a vague or weird question at first if you know cars well. Aren't they bought with the features they have? Can you go to the dealer to ask for upgrades? Until recently, the answer would have been no. Now, car manufacturers and dealerships are looking at ways to increase the lifetime value of customers and the additional services they can offer.

For example, BMW in 2023 announced it would offer heated seats on subscription. The cars would ship with the hardware, but you had to pay to have it working. They withdrew this due to consumer backlash. However, the writing is on the wall. Many people are subscribing to cars (see JLR's Pivotal approach). So, the idea of paying a little more in the winter for features you don't use in the summer is not a stretch. If we return to our example, the key information that needs to be fed into the AI to make this product recommendation request work is the customer's current subscription and feature set and all the available options. Then, the agent can use its understanding to pick out all the interior upgrades for that customer's situation. In one message, from one question. Nice.

OK, we've explored product recommendations a lot. Salesforce's Agentforce for Shoppers is a great start for exactly this topic.

Before we go to the next use case, let's look at the benefits and KPIs associated with this use case.

Benefits and KPIs

- Ease of finding what they want → Increased customer average order value
- Decreased time for customers to find what they want → Higher conversion
- Personalized experience at a 1:1 level → Increased customer satisfaction

#2: Ease of Purchase

I hate to state the obvious, but wouldn't it be easier to say 'yes' to an agent that says, "Are you happy to check this out and send it to your home address?" Of course, it would. Once I have found the product I want, I want to check out as fast as possible. Long have customers spoken to us about getting as close as they can to Amazon's experience of saved addresses, payment, and so on to make it as 'one click' as possible.

Now, with agents, it doesn't even have to be a click. It's not difficult to type yes. It's even easier to say 'yes.' Did I mention that everything we think about in these use cases applies to voice as much as it does to typing? Of course, it does. Agents are just as good at understanding voice as they are at using text.

The key to this is, again, customer context. Having a set 'home' address enables the ability to deliver to 'home.' But even feeding in a new address is easy via chat. 'Can you let me know your postcode (or zip)?', 'House number?', 'Can you confirm that's 100 High Street, London EC11 1AA?' It's very simple compared to clicking into fields and typing. Many people will doubt that the conversational interface is superior and feels better than using a screen. I only need to look at my kids talking to Alexa to know that it is.

Security?!

You're probably thinking: How secure is it for me to make a purchase? Once I have unlocked my phone, is there a single barrier to making a purchase on Amazon? Not unless I want there to be! So, we need to consider the friction vs. fraud equation here. We need to consider all the contexts, too. If you have a customer already logged into your app, maybe a quick Face ID is enough to confirm the purchase as they use the phone.

For voice, maybe voice recognition is enough of a layer if other markers also add up (location, purchase value, etc.). We need to think about it and be happy about it.

Let's not forget that mobile purchases with Apple or Google Pay technology also lower this resistance. Anyone who has added this to their checkout has seen the immediate rise that can happen through this enablement. No doubt, when I see that icon, I am already happier, especially for infrequent purchases. Bottom line: We can be so much slicker when purchasing with agents.

Benefits and KPIs

- Less time checking out → Less abandoned carts → Better conversion
- Less time checking out → greater purchase satisfaction → Increased lifetime
 value

#3: Order Support

You couldn't have an Agentforce and Commerce paper without order support. Where is my order? (WISMO) is still the No. 1 query for companies. Purchases can run late, not provide an update for a while, or be in some unknown state in the customer's mind. This is what triggers WISMO requests. Agents can be very effective at these and other order queries. Let's dive into the details.

WISMO

Many commerce companies have done quite well with this in recent times. Retail and travel have led the way here, with other industries falling slightly behind.

In B2B contexts, orders can be even more time-critical than in B2C. For instance, take a shipment of steel required for a construction site. It may be important that this shipment isn't just delivered on time but also isn't early! Customer expectations in B2C always seem to be about being faster sometimes without consideration of when it will be used. For B2B, timing can be critical.

Companies are getting better at this. Delivery companies (FedEx, DHL, DPD, to name a few) have significantly upgraded their tracking ability and communicate directly with customers, often with a real-time number of stops to go and estimated time for delivery. This has made a big difference in reducing WISMO. It is when that process breaks down (i.e., when something is lost!) that WISMO inquiries are triggered.

"This is why WISMO seems easy, but it is not. Just checking the current order status on your internal system will not help the customer. With the power of agents, we can go much further."

The message from an agent: "Your order 0000123 is SHIPPED in our system. I contacted DHL, and I can see it's at their depot in North Seattle. It's been there for 2 days. I have raised a case for one of our service representatives to chase it down for you, as it's not normal for it to be in the depot for that long, and the expected delivery date was yesterday."

WOW. Isn't that a good response? The best thing about it is that this is already possible with agents right now. They can check the internal system. They can get the

tracking information and call the delivery company to get the status. We can give the agent guardrails about when to raise a case: "If the package has been with the depot more than 1 day, raise a case, as long as the delivery date is not in the future." We can do this because when delivery companies fail, they fail in patterns, and patterns are easily teachable to an agent and turned into instructions and guardrails. Very cool.

Order Cancellation / Simple Amendment

It's a basic one, but too often, order cancellation is a little too hard. It's easy to argue that if you already have the technical capability to cancel an order, why is it so hard for a customer to log in to their account and cancel their order? The short answer is that it's not, but a conversational interface (voice or text) can be faster with less friction.

Compare these two scenarios:

- I'm at home after having collected the kids from school. I ordered some school trousers from the place we usually go. I noticed I ordered only one pair, and I wanted two. I don't want to cancel, but I don't want to order again and pay two delivery fees. I go to the website and log in (again). I find my orders. I can't see an order edit button, so I cancel the order. I place a new order for the two pairs. That was a lot of click, click, click... click.
- 2 Same scenario. This time, I open WhatsApp and open the company business account I ordered from. I say I want to change the quantity of a product I ordered. The agent asks whether it was my last order, and I say yes. It asks what quantity of school trousers I want. I say two. In the background, the agent cancels the first order and places a new one using all the same details, this time for a quantity of two. It reports back that it's done.

Wasn't that SO much easier? Let's break down a few steps:

- The agent can be set to ask whether it's the latest order because that is the most common scenario for a quantity change.
- It can then look up the orders, select the latest dated order, and look into the order products. There's only one product, so there's no need to ask what product to change, just ask for the new quantity.
- The agent doesn't have any more technical capability than the customer. It can't edit orders, either. It did the same cancel and reorder routine. It just saved the customer a load of time.

Final point? I did it on WhatsApp while working around the kids, one message at a time — no web browser, web address, login, etc.

Reorder

Reordering is a simple commerce use case that agents can do very effectively due to their natural language understanding. Let's look at this in a B2B context, as it can be even more effective, especially as B2B use cases frequently have greater reorder needs, volumes, and adjustments.

Let's say we have Clara, who is ordering from a manufacturer she works with. Her company buys many items from this manufacturer as they fit windows for business parks and industrial units. Because of the nature of the business, they like to keep certain popular sizes in stock for standard fit, and they also have special orders for certain cases.

Today, Clara needs to reorder some items. She has three upcoming projects that are standard-fit industrial units with a set of roof lights and ten windows and frames each.

She knows she placed an order in the past few months for something similar. She asks our friendly agent to examine her previous orders for the past six months. "Can you

find my recent order that was delivered to the Unity Industrial Estate in Denver?" Because agents can search for orders, get that date and then examine the delivery addresses with natural language, the order is easy to find. It gives back the order information, including the products ordered. "That's the one! Can I reorder those products with double the quantities and send them to XYZ address?" Sure enough, the agent can easily do that. Before placing the order, it shows the products and quantities for confirmation, along with the address. Good to go.

Benefits and KPIs

- High containment of simple and frequent order use cases: Automate 80% of queries that humans do \rightarrow Reduce the cost to serve / free up human capital
- Serve customers whatever time/day they want to be served → Higher satisfaction and less delay in solving customer needs

#4 Subscriptions

Subscriptions are a common use case for commerce. Let's say we've got a high-tech company selling software. They sell the software by the seat (which AI will soon disrupt significantly, but let's forget about that for now!). Our customer, John, has an agreement with them for 800 seats. It's on a 12-month cycle at \$50 a seat, ending Jan. 31. It's July 7, and if John wanted to add 50 seats, this would certainly involve a portal, some confusing screens, and remembering portal details he rarely uses. Instead, he decides to try the agent.

After some initial ID&V (identity and verification), they get to it. John asks for 50 seats to be added to his account as they acquired a small business they didn't anticipate. First, the agent responds with something unusual:

"I checked your current user base, and it seems you have 70 users that have been inactive for over 6 months. Would you like to know who they are?"

Now, this may seem silly. They want to sell more seats. However, for retention

purposes, customers would be both amazed and delighted at customer service that pointed out something they could do to help the situation. For an agent, this is not a difficult check of the internal system via API or maybe in Salesforce itself to see inactive users on their tool. John responds that this would be amazing. In the interests of security, we don't want the agent to show personal information, even if John has been verified. So, instead, it sends the information to John via email. John says that's good for now and will follow up if anything else is needed.

After a little while, John is back. He still needs 10 more seats and asks the agent for those. The agent has been given some guardrails that they can add a certain number of seats themselves if payment is made via credit card for the remainder of the term, and then the seats can be discussed in the future under the renewal process. The agent adds those seats to the existing subscription and works out the amount owed using Revenue Cloud. It then sends a Commerce Pay Now link to John's email and explains that as soon as he pays using that link, the seats will be added.

Again, we skip all the complexity of finding how to use a portal after a long time away. The myth of self-service often hits these blockers with infrequent users, and they raise a case anyway. Often, this involves a sales rep who needs to look into the account, arrange a meeting or send some emails. The whole thing is SLOOOW. The technology isn't the problem; the interface is.

Welcome to Agentforce.

Benefits and KPIs

- Automation of simple changes to agreements → Go faster on more complex changes or renegotiations
- Speed of change for the customer and chance of proactive retention services →
 Higher customer satisfaction and higher lifetime value

#5 Replacement Parts

Warranty and replacement parts are frequent use cases for manufacturers, and agents can play a key role in helping with this typical commerce use case.

"For an agent to be effective here, they need to know what parts are associated with what products, the stock of replacement parts, and the customer's information."

Rather than the customer having to navigate a portal or wait to speak to a human, they can use an agent to great effect. A simple conversation starts with finding the product they have. "What product do you need a replacement part for?" The customer can tell them it's for an industrial garage door. The agent finds the product from the customer's previous orders and confirms it's the right one with the customer. "The motor has stopped working." Because the agent knows the spare parts associated with this product, it suggests the motor it thinks it is, and the customer confirms. The agent then places the order after checking that the product is still under warranty. Easy!

If the product wasn't under warranty, it could offer to do the same thing with the replacement part but instead send a payment link to take payment before the motor is shipped to the customer. The agent knows what to do because of a simple instruction we added to its set:

"If today's date is after the warranty end date, offer a payment link to pay for the replacement part."

Benefits and KPIs

- Hassle-free replacement parts → Higher satisfaction
- Better use of data → Less need for in-house 'experts' that become a crutch

#6 Agents as Assistants

Another HUGE topic is how agents can help our internal team do more with less time and better accuracy.

High-touch Customer Care

We hear from our luxury customers that the idea of talking to an AI agent is not good. Their proposition is routed in very high touch, human customer service that makes the customer the most valuable person to that team member at that time. The shopping experience is as much part of the pro position as the product itself. The idea that they would talk to an AI agent goes against this at its core.

However, agents can still play an important role in this setup. One of the major issues is to make sure you know your customer incredibly well. We can use agents to assist our team members in executing just that.

The customer enters the store, and the assistant recognizes her immediately. He looks her up quickly on a (very sleek) tablet and gets a fast view of her as a customer. A summary that gives information like:

- Lifetime value and spend in the last twelve months
- Last purchase date and what product
- Key preferences and notes
- Key product areas they frequently buy and which they don't
- Any key dates that are close

With all that information quickly brought into play, the assistant can immediately

have an excellent conversation without relying on memory. Now, great staff at these kinds of brands do have excellent memories for their customers, but they should also be backed up. Conversation can now include:

How is the black clutch working out for you? I see you're using it now.

I believe your birthday is coming up. We have something special for you.

Last year, you bought a gift for a baby. How are they doing?

In essence, the conversation shows how much we know the customer and can bring that into the conversation for a better experience. Of course, this can also be extended to suggested promotions, suggested products, personalized discounts, and so on. The list goes on with how an agent can deliver a superior in-store shopping experience through our humans.

Merchandiser Assist

Agentforce for Merchandisers is a suite of tools to help merchandisers of commerce sites move more efficiently. We see this as a key trend for the future where a chat or text interface is preferred by many instead of click, click, click, click, click!

Imagine setting up a promotion using natural language instead. "Create a promotion for all shoppers where they get the cheapest product free if they purchase three products in the solar panel category. The promotion is valid from Jan. 1 until Feb. 1 and can be activated using the code SOLAR3." That's much easier than the likely 100+ clicks it might require to make all these selections using a standard interface.

Let's move to product descriptions. Crafting great product descriptions requires time and effort. The descriptions given to merchandising by buyers can be too simple, focusing on features rather than on selling the product. Turn those into more attractive descriptions by asking the agent to generate your descriptions across multiple products at once. Translations are the next obvious use case for those serving multiple countries.

Finally, let's consider something even more powerful around insights through conversation. Oana asks her agent, "Tell me which categories performed the least in the last month?" The agent comes back and shows those categories. This insight is useful, but it's all about the actions that follow. "What suggested promotions are there for making these categories perform better?" A list is given, and as we saw earlier, they can be created immediately. Again, there is great speed and simplification of that whole process of examination, summary, and execution.

Benefits and KPIs

- Reduce time on high 'click' tasks → Higher employee productivity
- Better use of data → Higher customer satisfaction from being 'seen'

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Benefits and KPIs	Benefit	KPI	Detailed Vision
Increased CSAT (Customer Satisfaction)	Improved customer satisfaction through personalized interactions.	Higher customer satisfaction scores and repeat purchase rates.	Agentforce streamlines customer service by providing agents with relevant customer data and insights, allowing them to resolve issues more effectively. This results in quicker response times and more personalized service, enhancing overall customer satisfaction.
Higher Average Order Value	Upselling and cross-selling through targeted recommendations.	Increase in average order value and revenue per customer.	Agentforce simplifies the checkout process by minimizing the number of steps required to complete a purchase. It can also offer personalized discounts or promotions at checkout, encouraging customers to finalize their purchases quickly.
Ease of Purchase	Streamlined purchasing process with fewer clicks and personalized offers.	Reduction in cart abandonment rates and faster checkout times.	By understanding customer purchase patterns, Agentforce suggests complementary products or upgrades. For instance, if a customer is buying a smartphone, Agentforce might recommend a protective case or a wireless charger, thereby increasing the total purchase value.
Reduced Abandoned Carts	Targeted recommendations and reminders to complete purchases.	Decrease in cart abandonment rates and increase in completed sales.	Agentforce sends personalized reminders or offers incentives to customers who have left items in their carts. It also analyzes abandonment patterns to identify common issues, such as high shipping costs or complicated checkout processes, and suggests improvements to reduce abandonment rates.

Final Wrap-up: The Future of Commerce with Agents

There is no escaping AI and agents. This is likely the biggest technical innovation since the internet or modern smartphone. The first gave us the ability to connect to anyone, anywhere. The second gave us that ability on the move in a much more user-friendly way.

This time, we take that to the next level as computers can increasingly understand and act based on our natural language intent. Until this point, it had to be done through an interface where humans adapted to computers — keyboard, mouse, apps, screens, forms, flows, and so on. Here, we are reverting to our natural state of conversation. Humans will become better at talking to agents, and agents will get ever better at understanding what we're saying to provide options to act on. Text and typing are where we have started, and voice will become increasingly important.

As stated earlier, the gap between those who start, test, and learn and those who wait to see what happens will widen. We have already seen this in personalization, mobile commerce, loyalty, and more. Agents are another area. Every time this happens, though, the iteration speed becomes faster. What might have moved at a generational pace before is moving over just a few years to be able to keep up.

The time is now.

<u>Contact us</u> today to schedule a consultation and see how our tailored solutions can accelerate your Al-driven customer engagement strategy.

AUTORS







OSF Digital is a global leader in digital transformation, specializing in Salesforce solutions that drive operational efficiency and business growth. With expertise in Al 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.

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