

TMT Agents

- **Agentforce for High Tech Accelerator \$25k**
- Select **1** of the following TMT Agent use cases*
- Agent is connected to Salesforce org data
- Prompts, Flows & Actions created to support use case
- **6 Week** Agent rollout



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Software Onboarding



Network Optimization Support



Self-Service Quoting



Ad Manager Assistant



Self-Service Subscription

** Data Cloud Use Cases Available Upon Request*



TMT Agents Use Cases



Software Onboarding

- Support on product features & release notes
- Step-by-step instructions for user onboarding
- Recommend solutions for user queries
- Offer guides and tutorials for product navigation
- Transfer complex issues to human agents



Self-service Subscription

- Monitor and update order status in real time
- Generate orders based on selected subscriptions
- Handoff to Salesforce payment page to complete order



Self-service Quoting

- Generate/manage quotes for specific products
- Add/remove products, adjust quantities, & update quotes in real-time
- Apply promotions or reseller/OEM discounts
- Download quotes in PDF/Word format



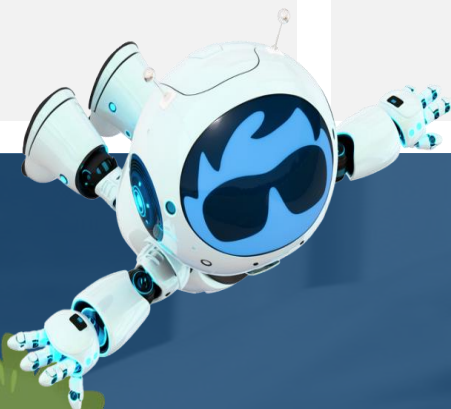
Network Optimization Support

- Track network equipment status, give live updates
- Flag upcoming maintenance & potential issues
- Provide real-time diagnostics & troubleshooting
- Guide customers to boost WiFi & adjust settings



Ad Manager Assistant

- Check inventory for upcoming digital & print editions
- Suggest best ad placements based on type of product or campaign
- Provide a summary of ad campaign performance
- Summarize advertiser's ad placement billing



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FINS Agents

- **Agentforce for FinServ Accelerator \$25k**
- Select **1** of the following FINS Agent use cases*
- Agent is connected to Salesforce org data
- Prompts, Flows & Actions created to support Use case
- **6 Week** Agent rollout



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Automated Document Requests



Onboarding Tracker



Automated Performance Reports



Client Profiler Agent



Automated Financial Proposals

** Data Cloud Use Cases Available Upon Request*



FINS Agent Use Cases

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Automated Document Requests

- Sends customized requests to clients for required documents, including onboarding forms, financial records, and compliance documents



Onboarding Tracker

- Provides advisors with real-time status updates on each client's onboarding process, identifying any missing information



Automated Performance Reports

- Regularly generates portfolio performance summaries, highlighting key metrics and any underperforming assets



Client Profiler Agent

- Regularly generates portfolio performance summaries, highlighting key metrics and any underperforming assets



Automated Financial Proposals

- Uses historical client data and financial goals to generate tailored proposals for insurance policies, investment strategies, and financial plans



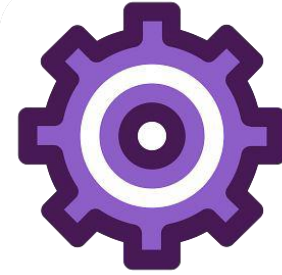
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MAE Agents

- **Agentforce for Manufacturing Accelerator \$25k**
- Select **1** of the following Manufacturing Agent use cases*
- Agent is connected to Salesforce org data
- Prompts, Flows & Actions created to support Use case
- **6 Week** Agent rollout



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Sales Contract Health Monitor



Dynamic Claims Adjuster



Shop Floor/Truck Roll Mentor



Supply Chain Optimizer



Proactive Maintenance Manager

** Data Cloud Use Cases Available Upon Request*



MAE Agents Use Cases



Sales Contract Health Monitor

- Automated Contract Summarization & Key Term Extraction.
- Continuous Contract Compliance Monitoring.
- Sales Agreement Performance & Forecasting with proactive adjustments.
- Margin & Pricing Insights with suggested price adjustments.
- Contract Change Request Automation.



Dynamic Claims Adjuster

- Automated Warranty Eligibility Check.
- Predictive Warranty Expiration Alerts for internal teams & customers
- Real-Time Entitlement Validation and parts ordering.
- Dynamic Recommendations for Extended Coverage.
- Warranty Claim Automation if the asset repair qualifies.



Shop Floor / Truck Roll Mentor

- Contextual Asset & Case History Insights.
- Dynamic Work Order Guidance with Adaptive Checklists
- Equipment Manual Access & Guidance with troubleshooting tips
- Intelligent Mentor Matching & Collaboration
- Automated Knowledge Capture & Article Generation



Supply Chain Optimizer

- Demand Forecasting & Stock Level Prediction.
- Supplier Performance Analysis to minimize supply change disruptions.
- Automated Inventory Reorder Point Adjustment.
- Inventory Redistribution Suggestions based on demand & external factors (weather, etc.)
- Predictive Maintenance Integration for Parts Inventory



Proactive Maintenance Manager

- IoT Data Monitoring for abnormal ranges and conditions.
- Predictive & Root Cause Analysis using historical data.
- Work Order creation & technician assignment.
- Parts availability check in ERP with stock level alerts & availability timing.
- Technician Assistance and handoff to mentorship agent or person-to-person guidance



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Sales Agents

AgentForce for Sales Accelerator \$15K

- Select one of the following Sales Agent use cases
Includes up to 2 topics
- 1 RAG Agent (Salesforce Data Only)
- Up to 2 standard actions & 1 Custom Action with No Integration / Authentication
- Risk Assessment and mitigation plan for defined use case
- Governance & Operational Considerations for defined use case
- **4 Week** Agent rollout



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**Lead Capture
& Outreach**



**Sales
Coaching**



General FAQ

** Data Cloud Use Cases Available Upon Request*



Service Agents

Agentforce for Service Accelerator \$15k

- Select one of the following Service Agent use cases
Includes up to 2 topics
- 1 RAG Agent (Salesforce Data Only)
- Up to 2 standard actions & 1 Custom Action with No Integration / Authentication
- Risk Assessment and mitigation plan for defined use case
- Governance & Operational Considerations for defined use case
- **4 – 8 Week** Agent rollout



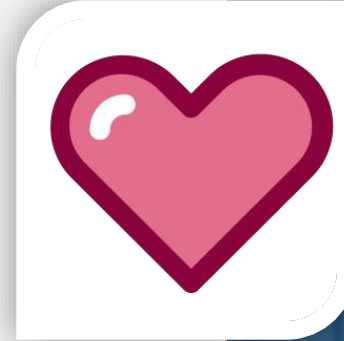
**Order
Management**



**Appointment
Booking**



General FAQ



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** Data Cloud Use Cases Available Upon Request*

Data Cloud Quickstart

- Connect Salesforce CRM and up to 2 external systems and 5 entities from the 2 external systems
- Includes setup of 2 Calculated insights, 3 Segments, and 1 Data Action
- Stakeholders collaboration to define data dictionary & data model entities.
- Stakeholders define key metrics & business objectives for calculated insights.
- The identified metrics will align with the goals & provide actionable insights.
- Data sources will be assessed for data quality prior to ingestion.



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Data Cloud setup



Identity Resolution (IR)



Data Actions & Reports



Stakeholder Engagement



Insights



Support



Data Ingestion & Harmonization



\$25K Value

Agentforce

SMB Offer

- AI Agent for Sales, Service or a custom functionality
- Includes up to 2 topics
- Up to 2 standard actions & 1 Custom Action with No Integration / Authentication
- Risk Assessment and mitigation plan for defined use case
- Governance & Operational Considerations for defined use case
- **4 - 8 Week** Agent rollout*



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Sales



Service



Custom

** SOW to be signed by Dec 31st*



\$100K Value

Agentforce

Commercial/Enterprise Offer

- AI Agent for Sales, Service or a custom functionality
- Includes up to 3 topics
- Up to 4 standard actions & 2 Custom Action
- Includes Data Cloud setup and configuring Salesforce CRM & Connect up to 2 external systems and 5 entities.
- Risk Assessment and mitigation plan for defined use case
- Governance & Operational Considerations for defined use case
- **10 - 12 Week** Agent rollout*



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Sales



Service



Custom

+ Data Cloud



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Agentforce

Commercial/Enterprise Offer

- AI Agent for Sales, Service or a custom functionality
- Includes up to 3 topics
- Up to 4 standard actions & 2 Custom Action
- Includes Data Cloud setup and configuring Salesforce CRM & Connect up to 2 external systems and 5 entities.
- Risk Assessment and mitigation plan for defined use case
- Governance & Operational Considerations for defined use case
- **10 - 12 Week** Agent rollout*



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Sales



Service



Custom

+ Data Cloud



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