

# Brillio and Agentforce: Ushering in the Era of Agentic AI



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**Brillio transforms Agentforce into a business-ready solution tailored to your unique needs. Seamlessly integrating agents across applications, databases, and systems, we unite data and insights across marketing, sales, commerce, and service by applying our proprietary factory model to accelerate time-to-market.**

Agentforce is an innovative AI agent platform designed to revolutionize productivity across diverse business functions, including Service, Sales, Operations, CX, IT, Finance, and HR. By automating routine tasks, it enables teams to focus on higher-value, strategic activities.

Combining Data and AI, Agentforce positions organizations to lead the way in automation. With Gartner reports predicting that over 50% of enterprises will abandon homegrown LLM efforts by 2028 due to cost and complexity, Agentforce provides a scalable, efficient alternative.

## Meeting Today's Business Challenges

In today's fast-paced business environment, organizations face challenges in handling repetitive tasks, managing data silos, and delivering personalized customer experiences. Agentforce bridges these gaps through:

**Automating Repetition:** Freeing teams from mundane tasks, enabling them to focus on complex and creative work.

**Data Intelligence:** Leveraging Salesforce's Data Cloud to unify data from multiple systems, facilitating smarter decision-making.

**Enhanced Decision-Making:** Powered by the Atlas AI reasoning engine, Agentforce streamlines workflows, automates decision-making and personalizes customer interactions.

**Ecosystem Support:** Built and supported by a robust Partner Network for seamless integration and scalability.

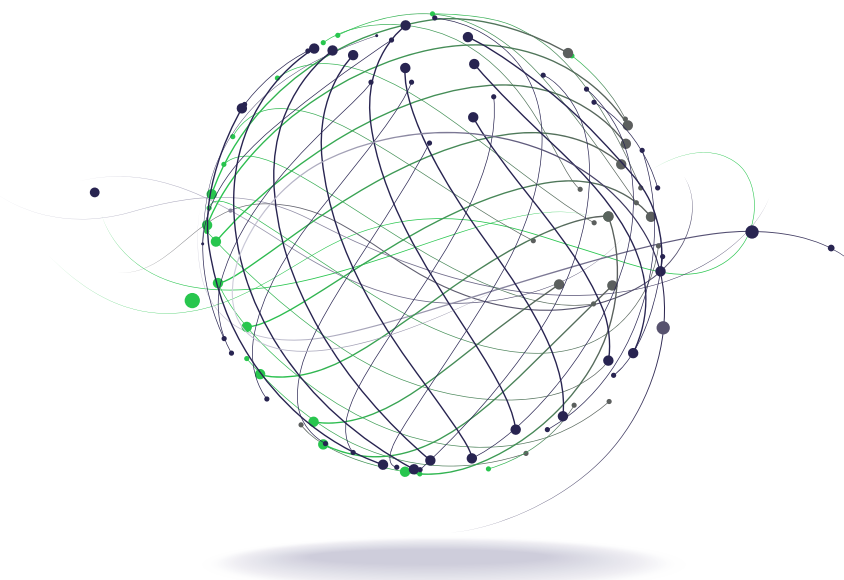
## Tailor Your Enterprise AI Strategy

Agentforce harnesses the power of AI to meet three critical strategic needs, enabling businesses to operate more efficiently.

**Predictive AI: "What should I do next?"** – Drive informed decision-making with lead scoring, accurate forecasting, and time optimization.

**Generative AI: "Help me get the job done"** – Streamline workflows with automated service replies, case summarization, and code generation.

**Autonomous AI: "Just do the job on my behalf"** – Achieve end-to-end automation with autonomous sales planning, customer support, and lead nurturing.



## Your Agentforce Benefits

**Real-Time Data Access:** Gain instant access to standardized processes, best-practice technology frameworks, and the benefits of a Center of Excellence, empowering teams to operate efficiently and consistently.

**AI-Driven Insights:** Harness predictive analytics and next-best-action recommendations to anticipate customer needs and deliver proactive, tailored solutions that drive engagement and loyalty.

**Improved Customer Experience:** Leverage full visibility into customer journeys, histories, and preferences to provide seamless, personalized, and highly satisfying service experiences.

**Mobile-Ready:** Enable agents to stay productive on the go with Salesforce's mobile app, seamlessly integrated with Agentforce for real-time record updates, customer interactions, and actionable insights.

**Enhanced Collaboration:** Foster real-time collaboration across teams, managers, and departments with tools like Salesforce Chatter or Slack, streamlining communication and boosting efficiency.

**Scalability:** Scale effortlessly from 50 to 5,000 agents with a platform designed to adapt, maintaining consistent control and insights as your organization grows.

## Brillio's Approach to Agentforce

### Agentforce Factory Model

Our Agentforce Factory Model ensures seamless client engagement and scalable delivery through:

**Core SME Expertise:** Shape opportunities, support pre-sales, and lead impactful customer discussions with a skilled team of Architects and Product Owners with expertise in Salesforce Data & AI Cloud.

**Enhanced Pre-Sales Enablement:** Streamline go-to-market strategies, maintain updated case studies, and provide standardized templates for Data, AI, and AgentForce projects.

**Shared Delivery Model:** Leverage a flexible COE resource pool supported by strong governance and cross-functional expertise in Data, AI, and AgentForce.

**Repeatable Use Cases & Solutions:** Prioritize high-impact, reusable, and industry-specific solutions while centralizing updates every two weeks to stay ahead of market demands.

**Upskilling & Continuous Training:** Develop world-class Salesforce expertise through training cohorts, rewards programs, and capstone projects for hands-on expertise.



# Brillio's Shared Services POD Model

With Brillio's Agentforce implementation, you gain a streamlined approach to resource allocation and service delivery, supported by professionals across shared and dedicated roles and a **POD Director** who standardizes processes and oversees support sequencing for consistency and efficiency.

## Shared Resources:

Centralized experts deliver specialized services across accounts, including:

- **Agentforce Product Manager:** Ensuring quality assurance, optimizing development processes, and managing day-to-day operations for scalable applications.
- **Customer Success Manager:** Providing SMB-focused support, including technical training, customer relationship management, and community engagement.
- **Architect / Tech Lead:** Designing scalable solutions, managing technical tasks, and supporting multiple accounts with technical excellence.
- **Industry / Domain Expert:** Expanding project scope with SMB accounts and Salesforce leaders, delivering contextualized industry-specific solutions.

## Dedicated Resources:

- **Focused Implementation:** Delivering exclusive support to one account at a time.
- **Specialized Development Teams:** Assigning 1-2 developers per account for tailored, effective execution.

# Practical Applications for Agentforce in Service Delivery

## General FAQs & Data Summarization:

Efficiently handle business, product, or service-related inquiries using documented knowledge articles. Deliver concise and relevant record summaries based on user queries.

**Order Management:** Streamline order-related tasks, including checking order status, processing cancellations, and managing returns.

## Reservation & Appointment Management:

Schedule appointments for installations, repairs, or customized purposes with ease.

**Case Management:** Track case statuses, assist with case comments, and escalate complex issues to live support or sales agents for advanced resolution or debugging.

**Replacing Chatbots:** Upgrade from traditional or Einstein Chatbots to AgentForce Agents for a more tailored, human-like interaction.



# Practical Applications for Agentforce + AI & Data Cloud

**Financing Options for Education:** Support schools and students with loan options, availability, onboarding, and seamless financial assistance.

**Property Management & QA Audits:** Automate checklists, record summaries, and audits, empowering property managers with streamlined operations.

**Warranty & Repair Management:** Deliver autonomous support for warranty and repair services, reducing repetitive tasks and enhancing efficiency.

**Campaign Management:** Revolutionize campaign strategies by integrating real-time data, AI-driven insights, and automation into a unified platform.

**Agent Twin:** Combine data-driven insights with AI for contextual human and automated interventions, improving monitoring and performance management.

# Industry-Specific Solutions

## Healthcare:

Integrated Care Teams offer personalized care plans for high-risk cardiovascular patients, including lifestyle counseling, regular monitoring, and proactive health management.

## Banking & Finance:

- **Delinquency Management:** Prevent loan defaults by addressing overdue payments proactively.
- **Write-Off Solution:** Simplify and optimize processes for managing non-performing loans and past dues.
- **Collateral Management:** Identify and utilize assets as collateral for transactions.
- **Bankruptcy Solution:** Streamline case management, risk forecasting, and data integration for efficient handling of bankruptcy cases.
- **Loan Application Status:** Provide candidates with real-time updates on loan applications and guide them through the next steps.





## ABOUT BRILLIO

At Brillio, our customers are at the heart of everything we do. We were founded on the philosophy that to be great at something, you need to be unreasonably focused. That's why we are relentless about delivering the technology-enabled solutions our customers need to thrive in today's digital economy. Simply put, we help our customers accelerate what matters to their business by leveraging our expertise in agile engineering to bring human-centric products to market at warp speed. Born in the digital age, we embrace the four superpowers of technology, enabling our customers to not only improve their current performance but to rethink their business in entirely new ways. Headquartered in Silicon Valley, Brillio has exceptional employees worldwide and is trusted by hundreds of Fortune 2000 organizations across the globe.



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