



A New Era of Customer Service Begins with Agentic AI

Building Intelligent, Proactive, and Always-On
Customer Service with Salesforce Agentforce

brillio

Customer expectations have outgrown what traditional support models can deliver. Today's customers want immediate answers, continuity across channels, and interactions that reflect their history and preferences. Yet most organizations still operate on manual workflows, siloed systems, and reactive case handling, leaving both customers and agents frustrated.

Agentic AI represents the first real step toward a proactive, intelligent service model. Instead of waiting to be prompted, agentic systems can analyze customer data in real time, route issues based on context, initiate tasks automatically, and guide agents with dynamic, deeply informed recommendations. When embedded directly into Salesforce Service Cloud and implemented by Brillio, this becomes a powerful engine for modern support: a system that doesn't just respond, but acts.

The Shift to Agentic Support

Across telecom, consumer services, BFSI, healthcare, etc., the same breakdowns appear again and again: support waits when agents are offline, inconsistent answers when information is hard to retrieve, and slow case resolution when systems don't speak the same language. These pain points are not isolated to any single sector, but rather structural, rooted in legacy processes that were never designed for real-time customer engagement.

Agentic AI solves these systemic issues by turning service into a connected, data-driven ecosystem. Cases no longer wait for manual routing, agents no longer search through multiple systems for context, and customers no longer repeat their story over and over. Instead, the system understands what needs to happen next, and initiates it.

Why
organizations
are moving
beyond
traditional case
handling

Introducing Service Agentforce

At the heart of agentic customer service is Service Agentforce, a framework of AI agents built directly into Salesforce. These agents serve two distinct but complementary roles: one engages customers instantly and autonomously, while the other empowers service representatives inside the console with richer context and intelligent assistance.

Digital Experience AI Agent

Always available, always consistent

The Digital Experience AI Agent becomes the first line of support, present on every channel, at every hour, ready to address questions, deflect cases, and complete tasks inside Salesforce. Instead of scripted responses or rigid flows, it uses generative AI to speak naturally and handle requests such as case creation, record updates, appointment scheduling, cancellations, and case-status explanations.

This agent doesn't just provide answers – it performs actions, resolves routine issues end-to-end, and brings consistency across high-traffic channels without requiring businesses to create complex conversation trees or train large models. It is support that scales effortlessly, without compromising brand voice or customer experience.



Salesforce's
native AI agents
that elevate
every moment
of customer
support

AI Agents for Service Representatives

A real-time intelligence layer inside the agent console

While the Digital Experience AI Agent engages customers directly, the AI Agent for Service Representatives sits behind the scenes, amplifying human capability. It surfaces past interactions, synthesizes case histories into concise summaries, and proposes personalized responses rooted in product knowledge, customer behavior, and real usage patterns. It can classify cases, recommend next steps, draft emails, and even complete tasks triggered during a live conversation.

When an issue requires human expertise, the AI hands off seamlessly, ensuring the customer's story is preserved, context is never lost, and the agent can pick up immediately with clarity and confidence.

Together, these agents form a continuous support fabric: automated when it should be, human when it must be.

Agentforce in Action: Core Use Cases

Across the customer service journey, several use cases demonstrate how Agentforce transforms operational efficiency and customer experience.

Dynamic Case Routing Based on Customer Data

Ensuring the right case reaches the right agent, in real time

Instead of routing cases based on static rules, Agentforce uses real-time customer data to determine the best handler instantly. Because zero-copy integration allows the agent to tap into live data without duplicating it, routing decisions become more precise, personalized, and timely.


The result? Cases move faster, customer frustration drops, and agents receive the work they are best equipped to solve.

Automated Case Prioritization

Making sure critical issues never wait in line

Agentforce automatically ranks cases according to business commitments and customer impact. Variables like SLA risk, severity, client status, or historical issues feed into dynamic prompts that ensure urgent cases move to the top.

Instead of agents manually scanning queues, the system surfaces what matters most, so that high-value customers receive timely attention and SLA breaches become the exception rather than the rule.



Where agentic
intelligence
delivers
measurable
impact

Personalized Agent Scripts

Turning every agent into an expert without the lookup time

By combining generative AI and live customer data, Agentforce creates dynamic guidance that adapts to each situation. An agent working with a customer who recently purchased a product receives a different script than one assisting with a subscription renewal or support history issue. These scripts evolve with the conversation, ensuring agents always have the most relevant context at their fingertips.

This eliminates the inconsistency of manually searching through articles or past interactions, giving customers a more accurate and personalized experience.

Real-Time Escalation Management

Preventing issues from becoming problems

When conditions such as SLA breach risk, VIP status, or prolonged unresolved cases are detected, Agentforce escalates automatically. These escalations are triggered by live data and routed to the right supervisors or specialized agents.

Proactive escalation not only protects customer relationships but also reduces churn by intervening before dissatisfaction peaks.

Einstein AI for Service Cloud

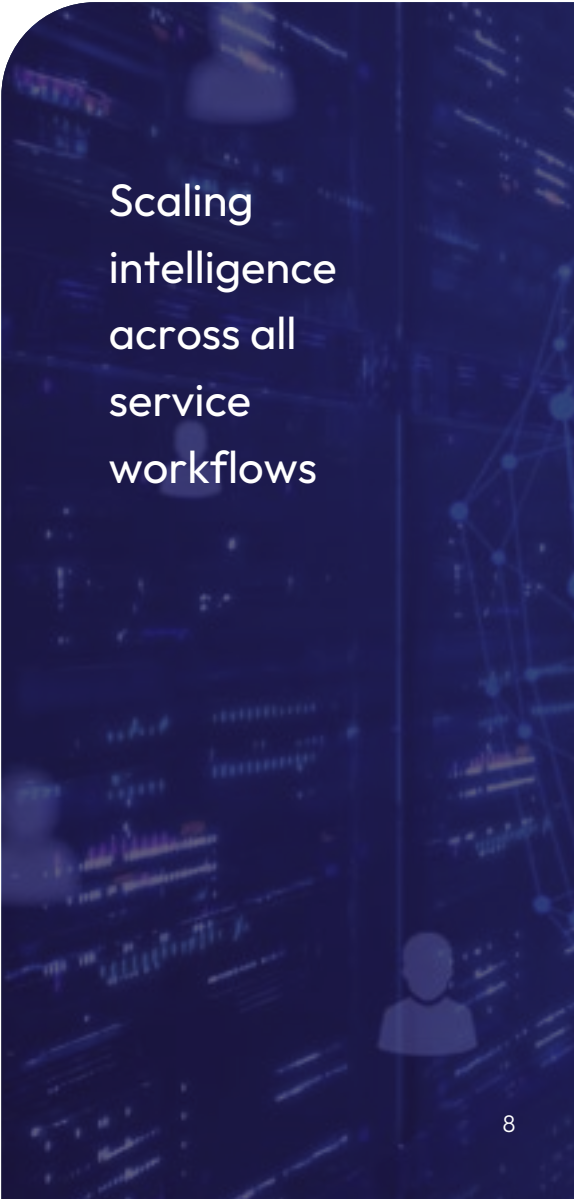
As service interactions grow more complex, organizations need intelligence that can keep everything connected and consistent. Einstein AI provides that layer inside Service Cloud, analyzing conversations, summarizing context, and generating the responses and recommendations that keep service moving. Einstein enhances both customer-facing workflows and internal operations, giving teams practical, ready-to-deploy ways to elevate speed, accuracy, and overall service quality.

Near-Term, High-Value Capabilities

Capabilities such as Service Replies, Case Summaries, Conversation Mining, AI-generated surveys, and automated email responses provide instant efficiency gains. These features reduce handling time, standardize quality, and eliminate repetitive work, allowing agents to focus on complex issues instead of manual data processing.

Knowledge article creation, one of the most impactful features, turns transcripts and interactions into complete articles, feeding back into the service knowledge base with minimal human effort. Similarly, Einstein for Feedback Management uses AI to craft targeted surveys, making it easier for organizations to capture actionable insights.

These near-term capabilities deliver immediate ROI because they integrate seamlessly with existing workflows and require little configuration.



Scaling
intelligence
across all
service
workflows

Mid- to Long-Term Customization Opportunities

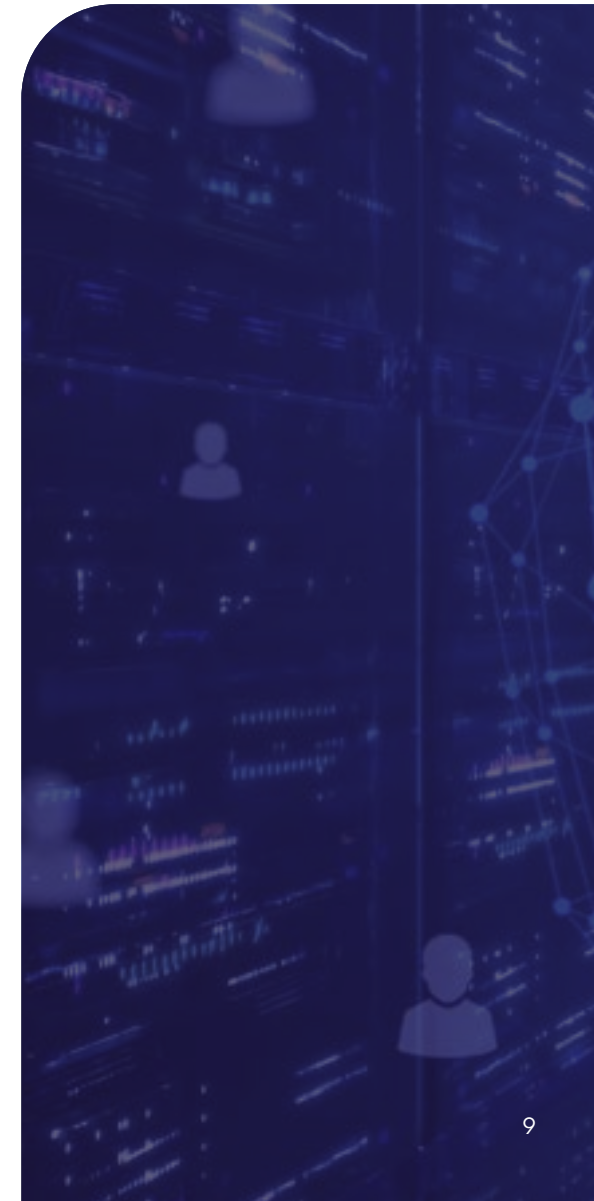
Some use cases require more tailoring but unlock powerful, long-range value.

Einstein for Service Catalog lets agents locate catalog recommendations without searching manually, while Service Agent AI Enablement supports fully autonomous workflows for specialized business needs.

Article recommendations delivered in real-time reduce lookup time dramatically, ensuring agents get the right information the moment they need it.

Service Plans, the most complex tier, aligns AI capabilities directly to long-term strategic service planning.

These solutions represent the evolution from automated tasks to intelligent, self-optimizing service ecosystems.



Why Agentforce Works

Agentforce succeeds because it brings together autonomy, natural language, clarity, seamless escalation, and rapid deployment – all without requiring complex development.

Its always-on availability means customers never wait for help. Its generative capabilities provide natural, contextual answers. Its intelligence layer enhances accuracy by prompting for missing information. And when issues require human expertise, it hands off instantly.

Perhaps most importantly, Agentforce deploys quickly, using templates and workflows that organizations already rely on, making modernization accessible without costly reinvention.

Use Case Spotlight: Omnichannel Case Allocation

Using Omni Channel Supervisor and AI-driven data insights, organizations can assign cases more effectively by factoring in language proficiency, expertise, region, availability, and workload.

Imagine a member logs into the portal and engages with an Einstein GPT-powered bot, which gathers context and prepares a complete view for the assigned agent. AI summarizes previous inquiries, generates recommendations, suggests responses, and delivers a full 360° agent and customer view.

For service managers, this means clearer oversight and controlled workloads.

For CSR, it means fewer overload situations, improved accuracy, and flexibility.

And for customers, it means faster, better-aligned responses.

Optimizing
workloads
through
intelligence,
not guesswork

How a Cloud Communications Leader Transformed Through Integrated Data and Automation

A global communications leader, serving over 120,000 businesses, partnered with Brillio to unify systems, streamline reporting, and improve data quality. Disconnected processes and inconsistent reporting slowed adoption and obscured performance insights.

By implementing Salesforce Wave Analytics, redesigning lead and reporting workflows, and establishing an integrated MDM setup, Brillio improved data quality by 80%, automated financial reporting entirely, and increased user adoption by 70%.

ABOUT BRILLIO

Brillio is a digital technology services company that drives AI-first engineering and design-led experiences for global enterprises. Born digital in 2014, its consulting-led services span Customer Experience, Data & AI, Product Engineering, and Digital Infrastructure. With an industry-leading NPS of 71, Brillio accelerates time to market through its proprietary BrillioOne.ai platform, powered by AI-ready talent with deep domain expertise. Brillio is the official Digital Transformation Partner and the official Data and AI Services Provider of Atlassian Williams Racing. Brillio partners with leading technology providers including Microsoft, AWS, Google Cloud, Salesforce, Adobe, Databricks, and Snowflake and operates with 6,000+ “Brillians” across 15 global delivery centers. Consistently recognized as a Great Place to Work® since 2021, Brillio blends innovation, talent, and purpose to deliver measurable outcomes for clients and fulfilling careers for employees.



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