AGENTFORCE IN FINANCIAL SERVICES: PERSONALIZED INVESTMENT ADVICE

Salesforce Cloud(s) Involved: Financial Services Cloud, Sales Cloud, Service Cloud

Challenge

A large investment firm struggled to provide timely, personalized investment advice to their growing client base, especially for high-net-worth individuals.

What Was the Ask?

Develop an AI-powered assistant that can analyze market trends, client portfolios, and risk profiles to offer tailored investment recommendations 24/7.

The Agent We Designed

Functional Capabilities: Integrate with Financial Services Cloud to access client data, including transaction history, risk tolerance, and financial goals. Analyze real-time market data and economic indicators. Generate personalized investment recommendations based on client profiles and market conditions. Provide natural language explanations for investment advice. Escalate complex queries to human advisors seamlessly.

Technical Design: Utilize Data Cloud to consolidate client data from multiple sources. Implement machine learning models for market analysis and prediction. Integrate with external APIs for real-time market data. Use natural language processing for client interactions. Implement secure authentication and data encryption protocols.

Benefits Achieved

24/7 availability of personalized investment advice. Increased client engagement and satisfaction. Improved portfolio performance for clients. Reduced workload for human advisors, allowing them to focus on complex cases.

Time Saved & KPIs Before and After

Before: Average response time to client queries – 24 hours. After: Reduced to 2 minutes (92% improvement). Client satisfaction: Increased from 75% to 92%. Assets under management: Grew by 18% in the first year after implementation. Client retention rate: Improved from 85% to 94%.

AGENTFORCE IN HEALTHCARE: INTELLIGENT PATIENT SCHEDULING AND FOLLOW-UP

Salesforce Cloud(s) Involved: Health Cloud, Service Cloud

Challenge

A large emergency care network faced inefficiencies in patient scheduling, leading to long wait times and missed appointments.

What Was the Ask?

Create an AI agent to optimize appointment scheduling, reduce no-shows, and improve patient follow-up care

The Agent We Designed

Functional Capabilities: Access patient records and appointment history from Health Cloud. Analyze historical data to predict optimal appointment times for each patient. Send personalized reminders via preferred communication channels. Conduct post-appointment follow-ups and collect patient feedback. Coordinate with various departments to optimize resource allocation.

Technical Design: Implement machine learning algorithms for predictive scheduling. Integrate with hospital's electronic health records (EHR) system. Develop a natural language interface for patient interactions via chat and voice. Create a dashboard for staff to monitor scheduling efficiency and patient feedback. Implement HIPAA-compliant data handling and storage protocols.

Benefits Achieved

Reduced patient wait times and increased appointment availability. Decreased no-show rates. Improved patient satisfaction and engagement. Enhanced coordination between different hospital departments.

Time Saved & KPIs Before and After

Before: Appointment no-show rate – 18%. After: Reduced to 7% (61% improvement). Average wait time for non-emergency appointments: Reduced from 3 weeks to 5 days. Patient satisfaction score: Increased from 3.5/5 to 4.6/5. Staff productivity: Improved by 25%.

Key Learnings from This Build:

The success of the AI agent heavily relied on the quality and completeness of patient data. Providing patients with the option to interact with human staff when needed helped maintain a balance between efficiency and personalized care

AGENTFORCE IN MANUFACTURING: PREDICTIVE MAINTENANCE AND SUPPLY CHAIN OPTIMIZATION

Salesforce Cloud(s) Involved: Manufacturing Cloud, Service Cloud, IoT Cloud

Challenge

A global manufacturing company faced frequent production delays due to equipment breakdowns and supply chain disruptions.

What Was the Ask?

Develop an AI agent to predict equipment maintenance needs, optimize inventory levels, and proactively manage supply chain risks

The Agent We Designed

Functional Capabilities: Monitor equipment performance data from IoT sensors in real-time. Analyze historical maintenance records and failure patterns. Predict potential equipment failures and recommend preventive maintenance. Monitor inventory levels and supplier performance. Forecast demand and optimize production schedules. Alert relevant teams about potential supply chain disruptions.

Technical Design: Integrate IoT Cloud with Manufacturing Cloud for real-time data processing. Implement machine learning models for predictive maintenance and demand forecasting. Develop a custom dashboard for visualizing equipment health and supply chain status. Create automated workflows for maintenance scheduling and inventory management. Implement natural language processing for generating actionable insights and reports.

Benefits Achieved

Reduced unplanned downtime and maintenance costs. Optimized inventory levels and improved cash flow. Enhanced supply chain resilience and responsiveness. Improved overall equipment effectiveness (OEE).

Time Saved & KPIs Before and After

Before: Unplanned downtime – High. After: Reduced by 35%. Maintenance costs: Decreased by 25%. Inventory carrying costs: Reduced by 20%. On-time delivery rate: Improved from 85% to 97%. Overall equipment effectiveness (OEE): Increased from 72% to 89%.

Key Learnings from This Build:

The integration of IoT data with historical maintenance records was key to accurate predictive maintenance. Establishing a feedback loop where maintenance technicians could provide input on AI-generated recommendations helped refine the model's accuracy over time.