

salesforce

Agentforce & Data Cloud

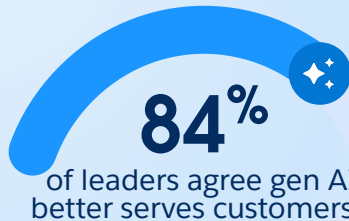
For Insurance Brokers

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Distinguished Solution Engineer



Gen AI can help insurance firms get ahead

Customer Success



Jobs

80%

of insurance firms report that AI will change and/or enhance current work **not** replace jobs.²



Productivity

62%

of insurance executives believe AI will improve operating efficiency and automate key tasks and workflows.³



Growth

~\$4.4T

expected annual GDP impact due to AI.⁴



Adoption

99%

of insurance firms report exploring or utilizing generative AI.⁵



Value

up to
\$50b

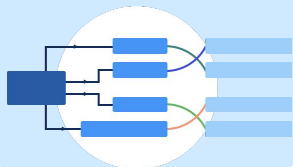
annual value for insurance industry when GenAI is applied to distribution.⁶



Evolution of Agentforce

Chatbots

Fixed rules & repetitive tasks



Copilots

Smart, tailored assistance

Write an email to my team based on this memo.



Sure thing! Here's a draft for you:

Subject: Team Update...

Agentforce

Knows your business

Plans & reasons

Takes action

Scales

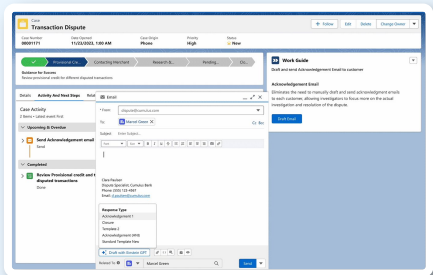
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Your Playbook for Trusted & Accurate AI

with the #1 AI CRM for Financial Services

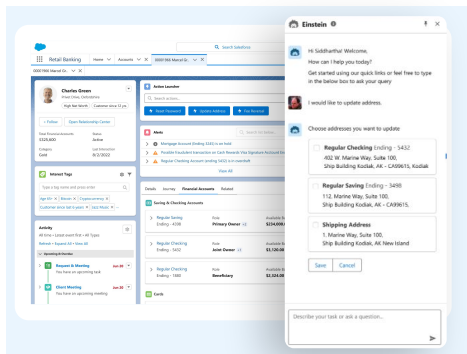


Embedded AI

Pre-built, ready-to-use AI tools embedded in the flow of work. They are user-friendly and require little to no technical expertise to deploy and use.

Example

"Create a Household Relationship Summary"



Assistive Agent

Employee-facing agent designed to streamline banking processes by handling smaller, manual tasks, allowing human agent to concentrate on more complex tasks and delivering superior customer service.

Example

"Summarize a complaint and generate a resolution email"



Autonomous Agent

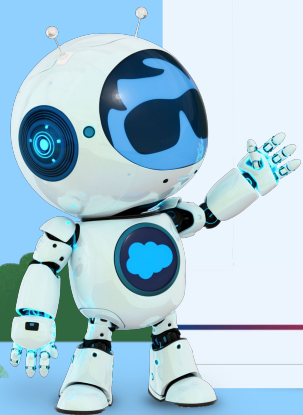
Customer-facing agents that can assist customers and complete tasks autonomously, seamlessly handing off to human agents when a guardrail is approached or a task becomes too complex.

Example

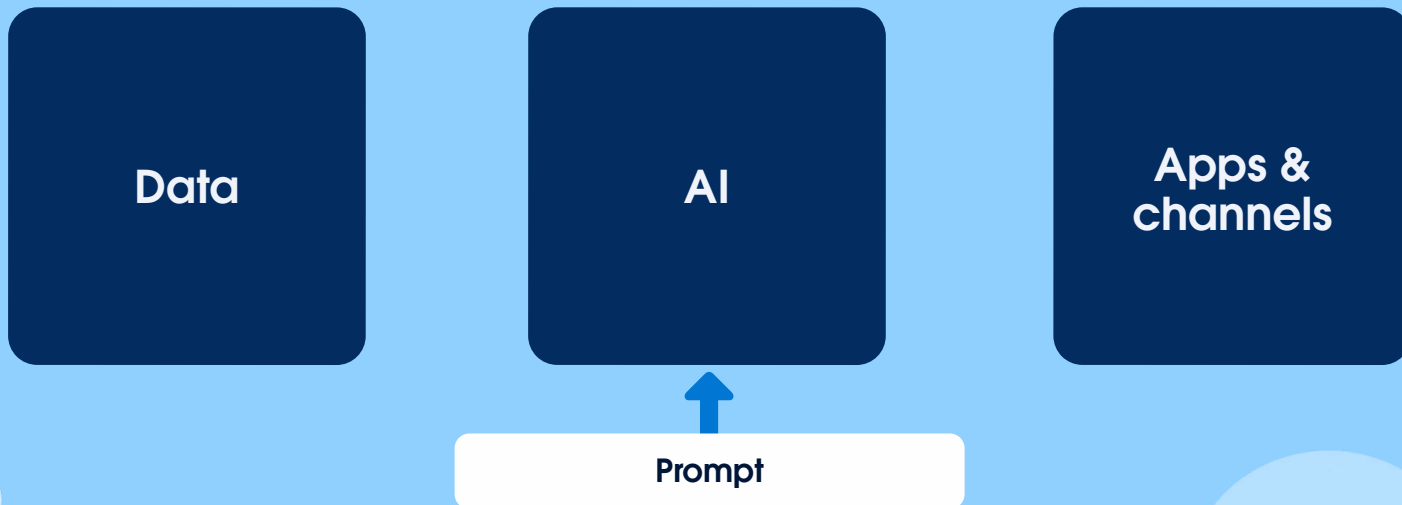
"Report a lost or stolen card and issue a replacement"

Unlock and Activate Financial Services Data

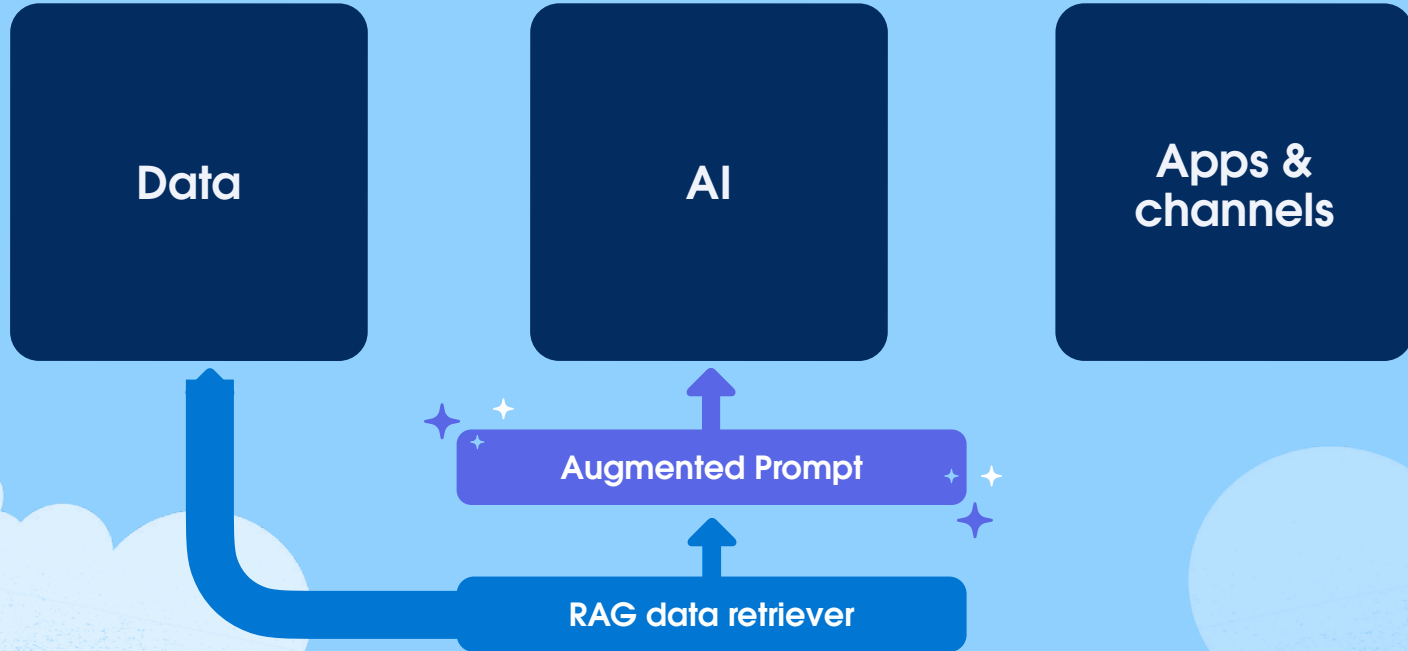
Agentforce learns & reasons with Atlas



AI needs your data to understand your business

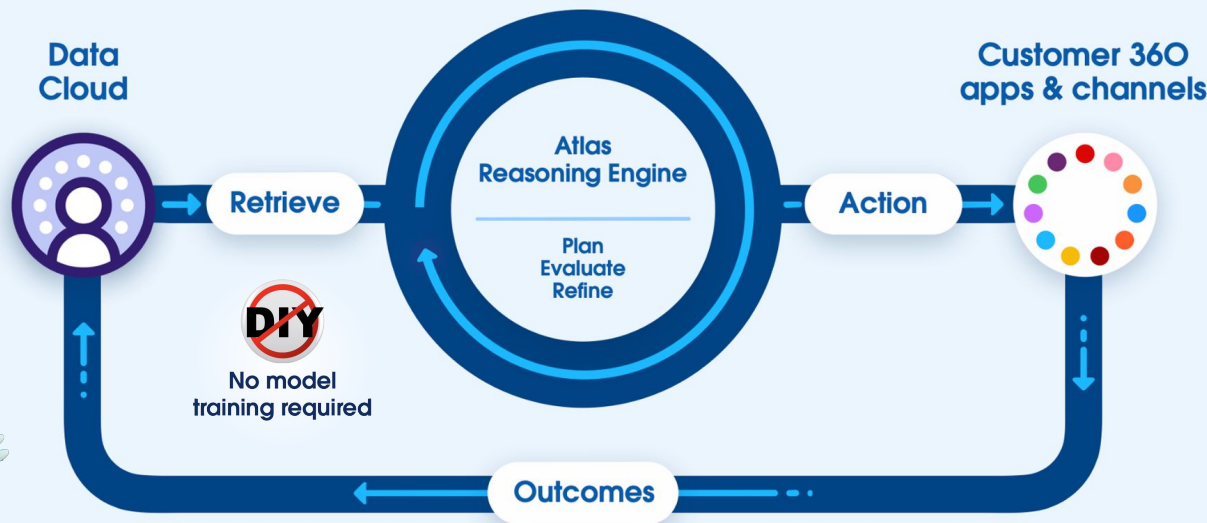
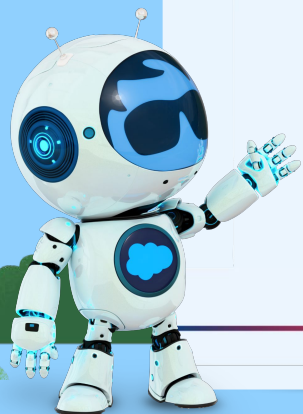


AI needs your data to understand your business



Data Cloud powers trusted & accurate results for Agentforce

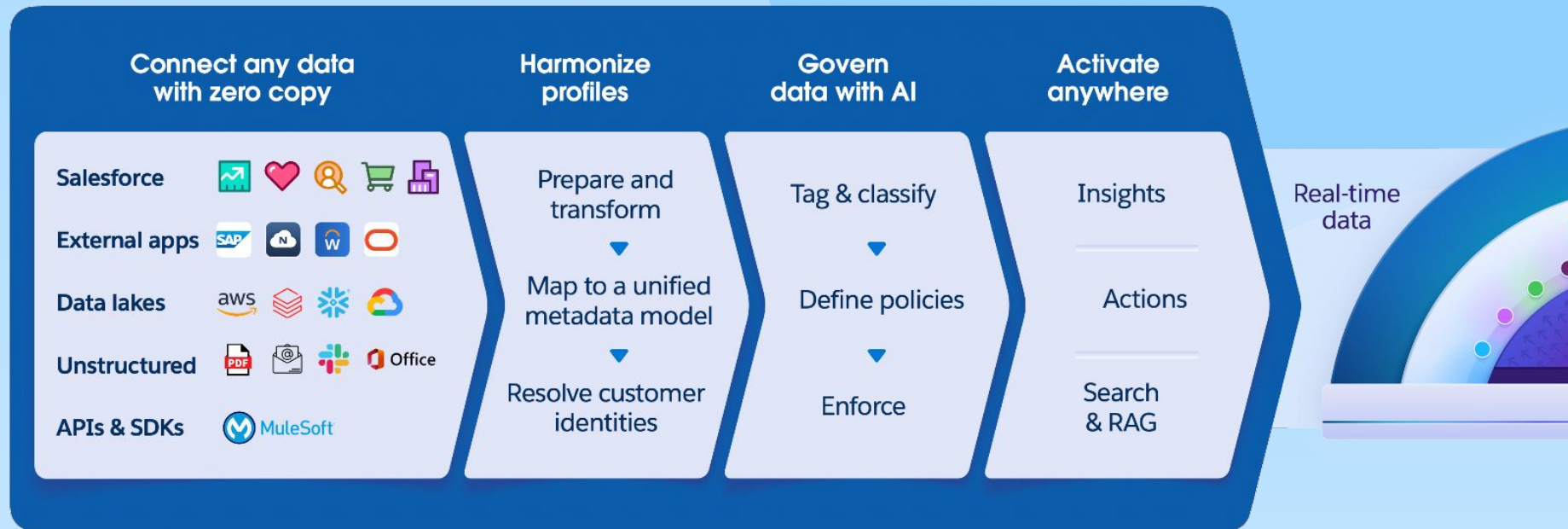
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Salesforce Platform



How Data Cloud works



The Fundamental Building Blocks of Agents

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Define jobs to be
done with

Topics

Order Management

Repairs

The Agent
runs in a specified
Channel

Agents have a defined location where they do their job, such as a customer support website.

Give each
topic specific
Instructions

1. Always offer to look up order status using either order number or email.
2. Always lookup return status before getting a return label.
3. As a first step before processing a return, educate the customer on process using knowledge articles.

Topic Classification Description: Define when to use your topic in a conversation, based on your user's intent.

Topic Scope: Define what it's able to do within your topic.

Create and
assign intelligent
Actions

Lookup Order Status

Generate Return Label

Answer Questions with Knowledge

Action Instructions: Describe the task your action does and when to use it in a conversation.

Action Input & Output Instructions: Describe how to format and use the input & output.

Agentforce Atlas Reasoning Engine

The output from the action is checked by the planner to make sure the response has addressed the original task

Should you Agentforce It?

Add the score for each question to determine the answer

Is this a Sales, Service, Marketing or Operations use case?

- Sales or Service +2, Marketing or Operations +1, No +0

If a human did this would they use Salesforce to do it?

- Already doing it in Salesforce +3, Would do it entirely in Salesforce +2, Partly in Salesforce +1, No +0

Is the data needed accessible to Salesforce?

- Data is already in Salesforce +3, Data would be in Salesforce +2, API/batch accessible to Salesforce +1, No +0

Are the actions needed accessible to Salesforce?

- Actions already being used in Salesforce, Actions would be in Salesforce +2, API/RPA accessible to Salesforce +1, No +0

Does Salesforce have a pre-built agent?

- Productized +2, Templated +1, No +0

Total Score

>8 Use Salesforce

4-8 Consider Salesforce

<4 Probably Not
Salesforce



Should you Agentforce It?



Add the score for each question to determine the answer

Is this a **Sales, Service, Marketing or Operations** use case?

Sales +2

Service +2

Marketing +1

Operations +1

Other +0

Would a **human** use **Salesforce** to do this job?

Yes - Currently +3

Yes - Planned +2

Yes - Partially +1

No +0

Is the **data** needed **accessible** to Salesforce?

Yes - Currently +2

Yes - Planned +2

No - Accessible via API/batch +1

No +0

Are the **actions** needed **accessible** to Salesforce?

Yes - Currently used +2

Yes - Planned +2

Yes - Accessible via API/RPA +1

No +0

Does Salesforce have a **pre-built agent**?

Yes - Productized +2

Yes - Templated +1

No +0

Total Score

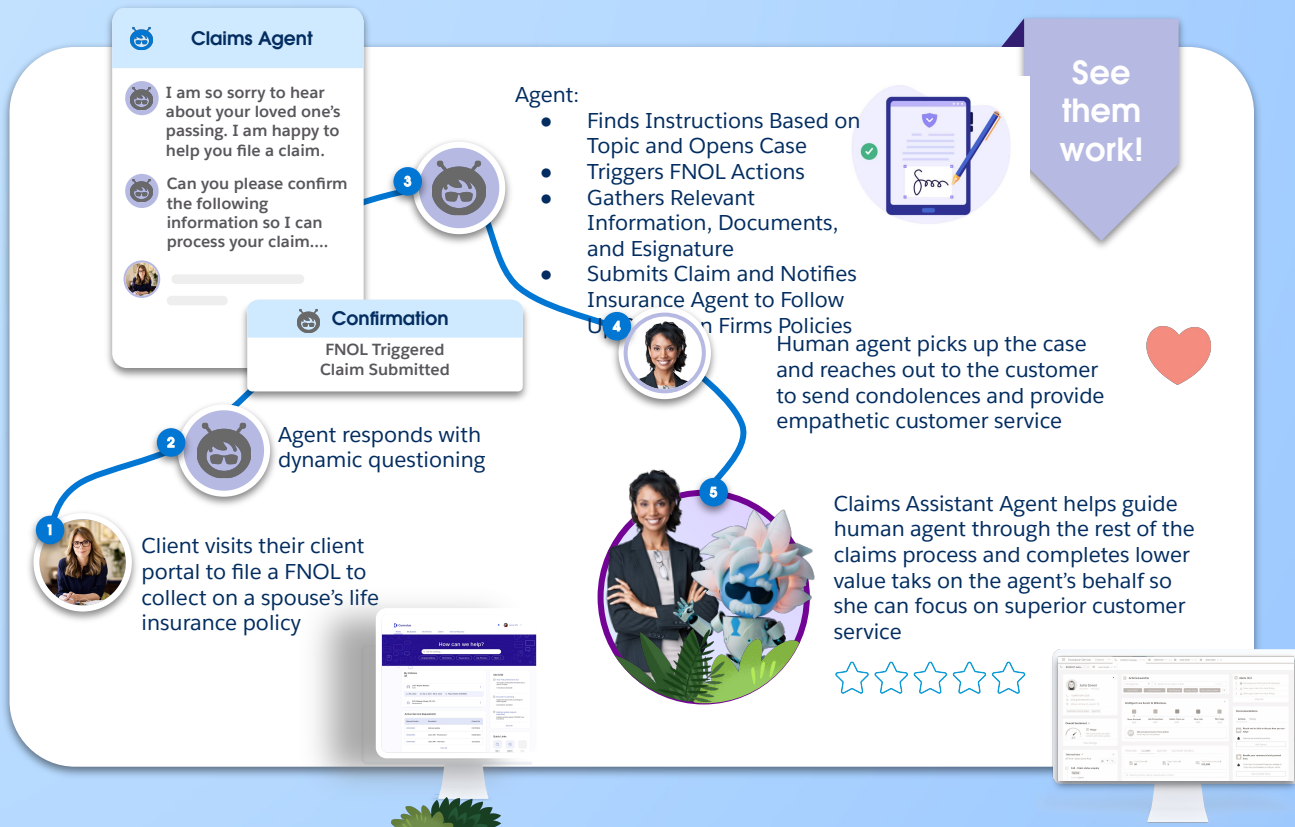
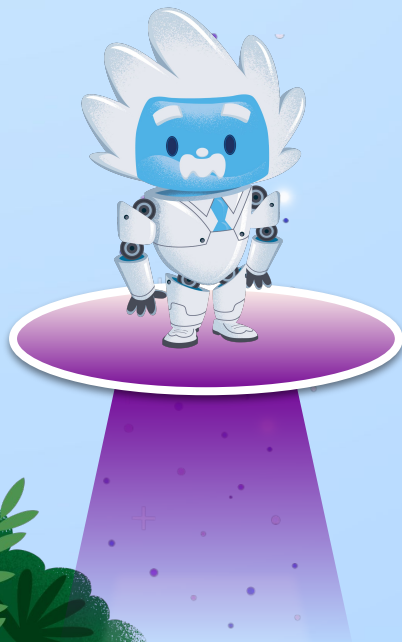
> 8:
Use Salesforce

4 to 8:
Consider Salesforce

< 4:
Probably Not Salesforce

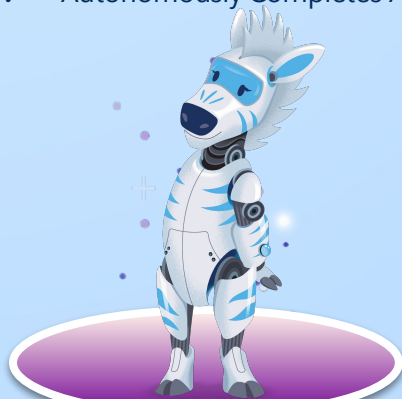
Insurance Agents | Policy Information

- ✓ Client-facing
- ✓ Focused on Service Excellence
- ✓ Autonomously Completes Actions



Insurance Agents | Claims Management

- ✓ Client-facing
- ✓ Employee-facing
- ✓ Focused on Service Excellence
- ✓ Autonomously Completes Actions



Claims Agent

Hi Rachel, I can help summarize your auto policy. Do you have a specific concern?

Yes, I need to know what my deductible is and if new brakes are covered under my policy.

Your deductible is \$750 and brakes are not covered under your current policy. Would you like me to schedule a meeting with your agent to discuss your policy?

Confirmation

Meeting Scheduled with Insurance Agent

Agent:

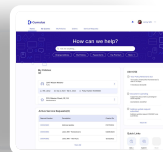
- Finds Instructions Based on Topic and Opens Case
- Reviews Customer's Policy and Summarizes Information Based on Customer Responses
- Schedules Meeting with Agent to Follow Up with Customer

See them work!

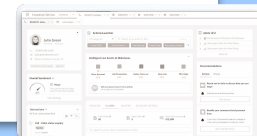


2 Agent responds with dynamic questioning

1 Customer visits their client portal to check on the details of their auto policy and triggers the Insurance AI Agent to help answer questions

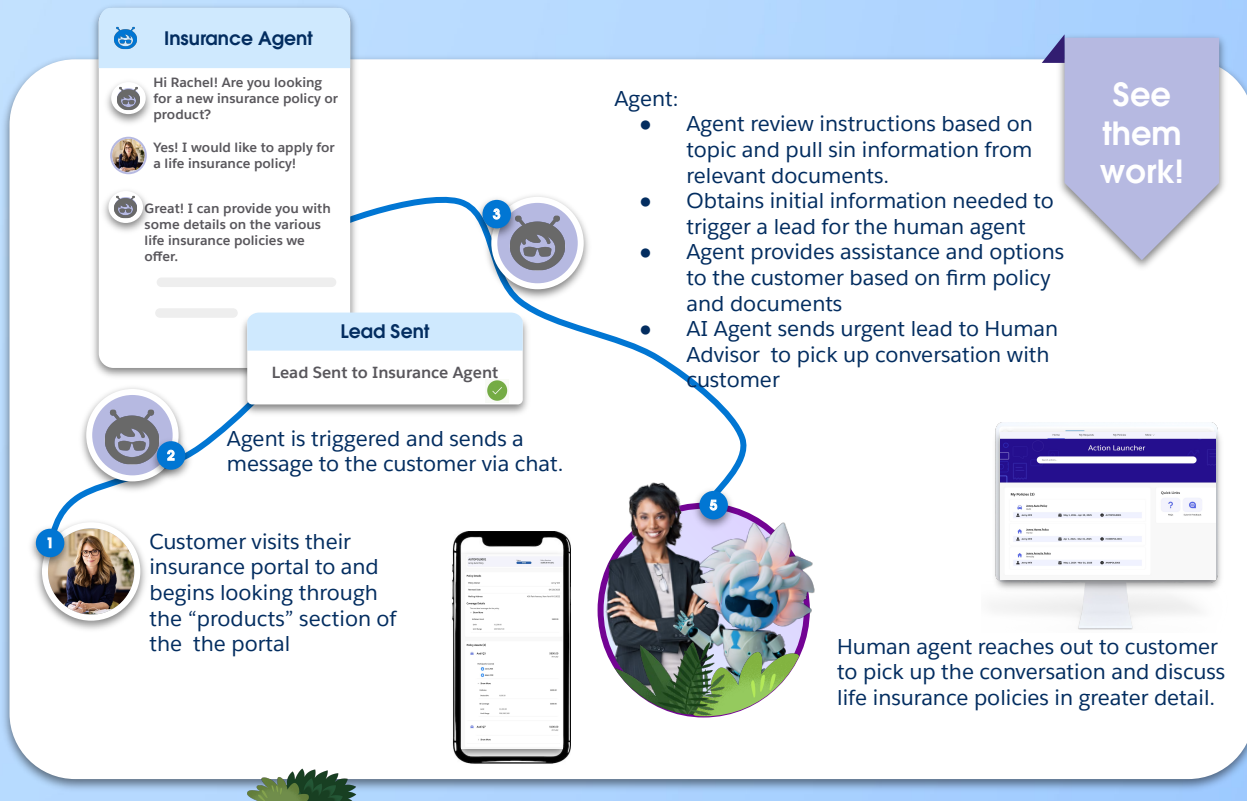


Insurance Agent holds meeting with the customer to discuss policy in greater detail and provide guidance on increasing coverage based on customer circumstances, providing superior customer service



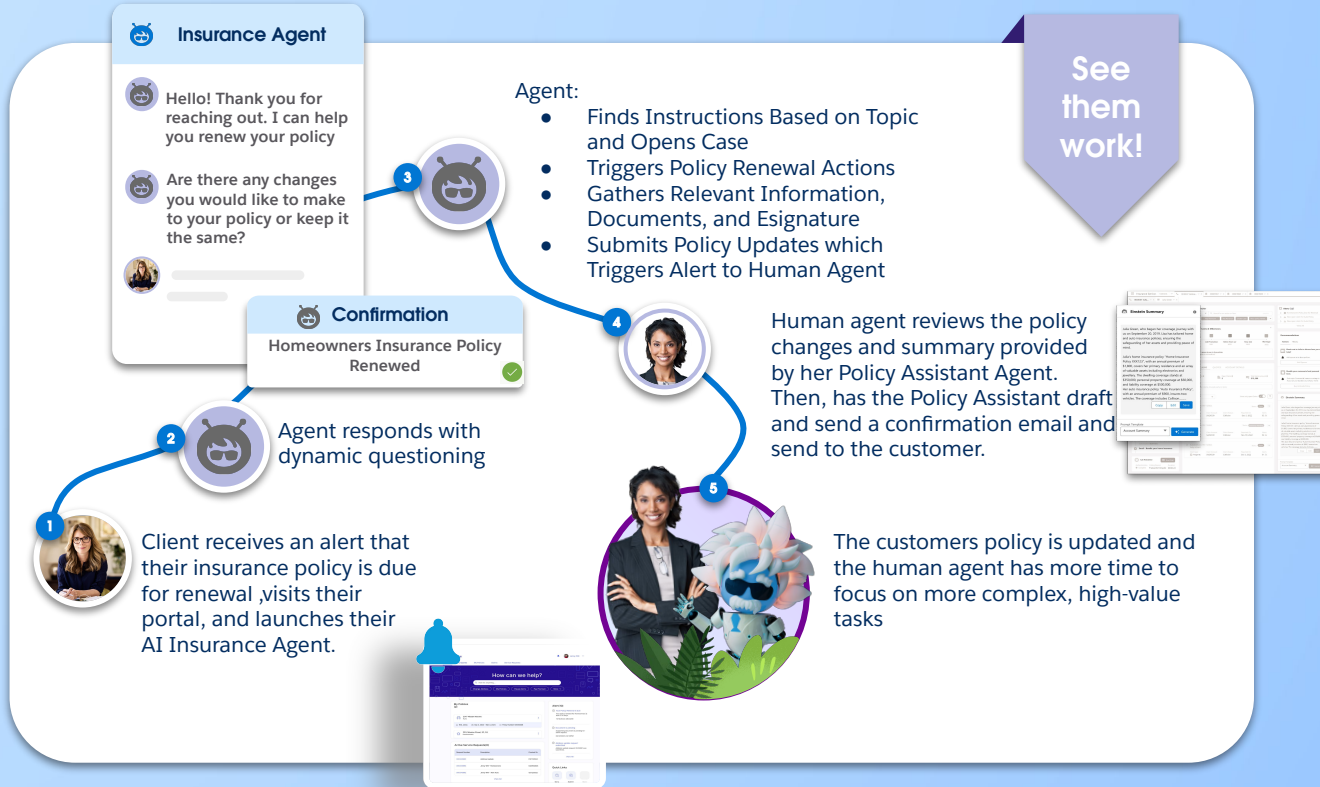
Insurance Agents | Insurance SDR

- ✓ Employee-facing
- ✓ Client-facing
- ✓ Focused on Growing Revenue
- ✓ Maximizes Broker/Agent Pipeline



Insurance Agents | Policy Renewal

- ✓ Client-facing
- ✓ Focused on Service Excellence
- ✓ Autonomously Completes Actions



Insurance Agents | Policy Underwriting

- ✓ Employee-facing
- ✓ Focused on Fueling Efficiency & Risk Mitigation
- ✓ Autonomously Completes Actions
- ✓ Assist Employees Complete Tasks

