



Bringing Salesforce AI into enterprise architecture

Elevate service experiences with Agentforce and more

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Today's business leaders are increasingly focused on understanding their customers in every area of their business. Whether it is sales, service, marketing, or any other department, effective organizations are building machine learning (ML) models to consolidate their customer data across multiple applications in the enterprise. In a parallel effort, many have integrated Salesforce customer relationship management (CRM) capabilities into their technology stack to elevate experiences for enterprise customers and drive value from a centralized source of data.

“Agentforce was designed out of the box to easily integrate with your existing AI stack with Data Cloud and existing capabilities to meet customers’ demands.”

– Adam Evans, EVP & GM Salesforce AI

The opportunities for growth in this space are rapidly developing, with artificial intelligence (AI) technology as one core driver. AI is helping organizations realize the substantial value of profile data unification with CRM in the enterprise—especially when combined with machine learning models to elevate the impact of every part of the business. Salesforce AI represents a suite of capabilities that many of today's leaders are adopting, but some may still be unsure how exactly to bring it into their enterprise architecture.

There are **four steps** to help determine how Salesforce AI can work effectively for your organization and its goals for unifying customer data to elevate experiences and, ultimately, drive loyalty. They are:

STEP

01

**GET FAMILIAR
WITH SALESFORCE
AI COMPONENTS**

STEP

02

**REVIEW TYPICAL
CRM AND ENTERPRISE
ARCHITECTURE**

STEP

03

**EXPLORE
OPTIONS FOR
ENABLEMENT**

STEP

04

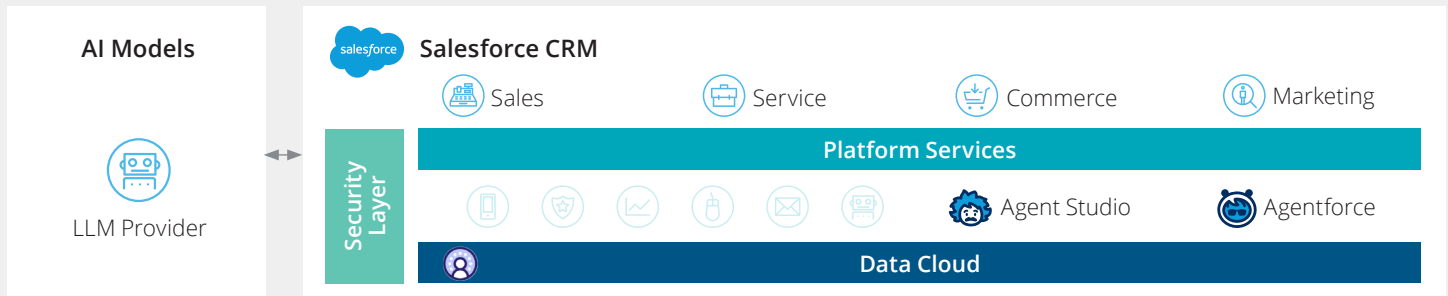
**BRINGING
IT ALL
TOGETHER**



STEP 1:

Get familiar with the Salesforce AI components

Salesforce has introduced five components to the platform to support AI features—they are Salesforce Data Cloud, Einstein Trust Layer, Agentforce Platform, Agent Studio, and the availability to connect with LLMs providers.



Salesforce Data Cloud:

Salesforce Data Cloud supports the audit trail of the transaction between the user and the Large Language Model (LLM). This means that it keeps a record of every request and response interaction the user has with the LLM. Salesforce Data Cloud also serves as a data lake, so it can ingest unstructured or semi-structured data and harmonize, transform, and segment it into a specific business purpose that supports analytics, operations reporting, and more. Its primary purpose is to create a unique customer profile by bringing together data across disjointed systems to create impactful models for business leaders to strategize with.

Einstein Trust Layer:

The Einstein Trust Layer is a new architecture layer for the platform to securely interact with the AI computing software. It offers the latest enterprise security standards, zero retention policy, and dynamic grounding. This layer allows customers the flexibility to “plug & play” with different ML models including Salesforce itself, a Bring Your Own Model (BYOM) feature, or third-party MLs while keeping data secure.

LLM Providers:

Salesforce can connect with leading Large Language Model (LLM) providers to leverage their latest AI advances, such as natural language processing (NLP) models and GPT models, to enhance customer service bots, improve email sorting, and provide advanced predictive text functionalities, among other capabilities.

Agentforce Platform:

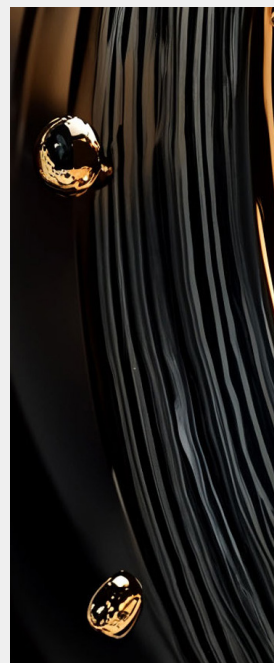
A natural language conversational generative AI agent on the Salesforce platform uses the LLM as its engine. The agent is assigned specific roles, data, guardrails, and channels, and is equipped with tools such as APIs, other agents, or copilots to perform tasks beyond the LLM's inherent capabilities. It can autonomously execute intermediate decision-making steps to enhance its ability to handle complex tasks.

Agent Studio:

When the pre-built agent does not satisfy the business needs, the Agent Studio—a part of the Agentforce Platform—can build your agent. Agent Studio consists of three tools to build and enrich the user experience of AI-driven agents, including the Agent Builder, the Prompt Builder, and the Model Builder. These tools can help today's businesses create custom actions using API integration to enrich AI prompts,

create prompt-based workflow templates, and create custom ML models.

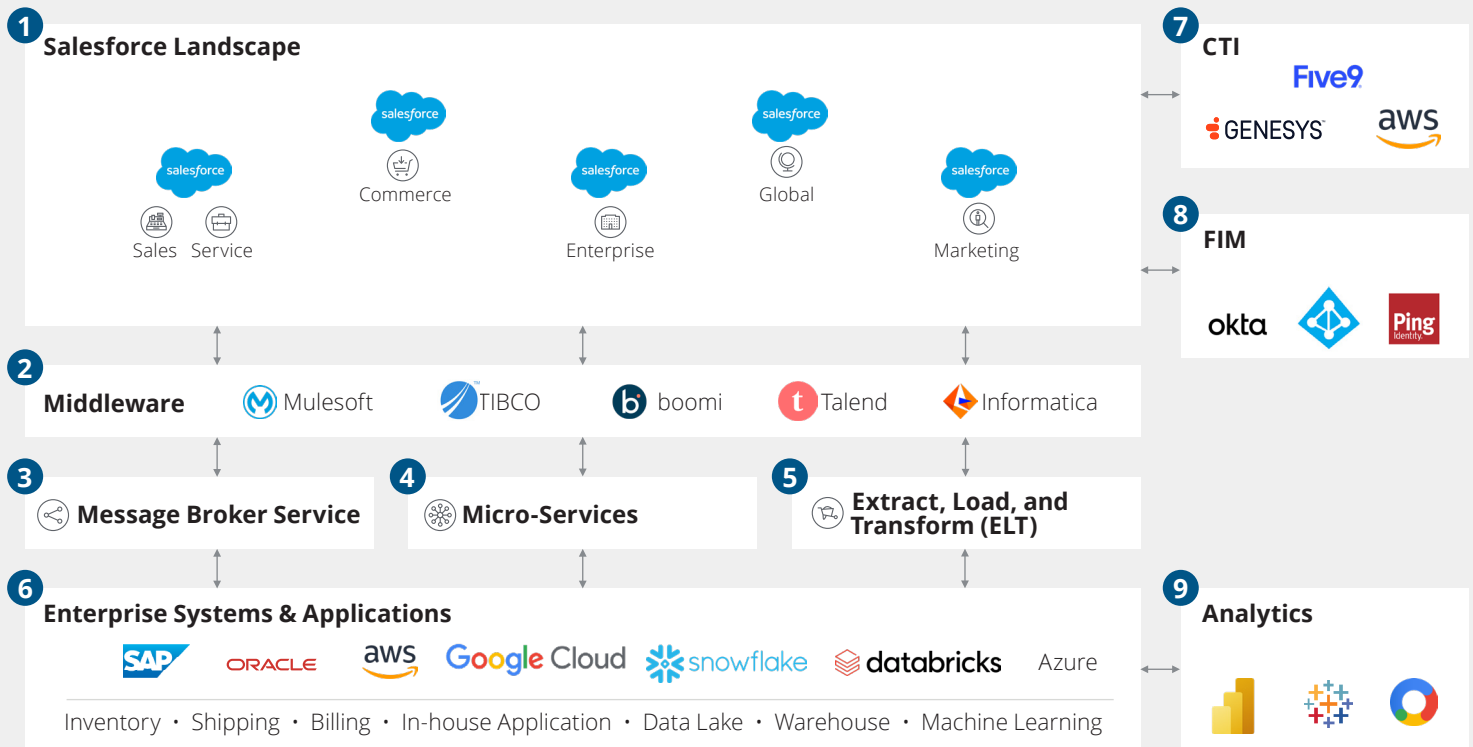
“We designed Salesforce with a low-code no-code set of tools to coexist and leverage existing investments seamlessly within your current AI stack.” - Adam Evans, EVP & GM Salesforce AI



STEP 2:

Review typical CRM and enterprise architecture

Once Salesforce has been integrated into an organization's workflows, the enterprise architecture may look similar to the illustration below.



KEY:

- | | | |
|--|--|---|
| 1 Multiple Salesforce instances across the enterprise that enable sales, service, commerce, marketing, and business processes | 2 Middleware that establishes data and process integration patterns between a CRM platform and enterprise systems and applications | 3 A stream integration pattern that enables the processing and reprocessing of data in real-time |
| 4 The exposure and consumption of autonomous APIs to share data across the enterprise and CRM applications | 5 A process that allows businesses to consolidate their data into one place, making it easier to analyze and report on | 6 An integrated view and management of the core business processes and applications to provide specific, customer-facing functionality |
| 7 Telephony integration that facilitates communication processes in environments such as call centers, help desks, and sales operations | 8 A platform that can enable authentication, enforce sessions and sharing of identity data across multiple channels and application/systems | 9 A platform to handle the collection, processing, analysis, and visualization of data |

While no two enterprise architectures are the same, the above is an effective template for today's business leaders looking to make a greater impact. It is important to then consider the integration of AI into the enterprise and how it can help organizations realize the most business value.

STEP 3:

Explore options for AI enablement

The CRM and AI journey can be divided into three buckets based on the organization's current capabilities:

Greenfield:

The organization has no present AI capabilities, but leadership wants to start exploring them

Hybrid:

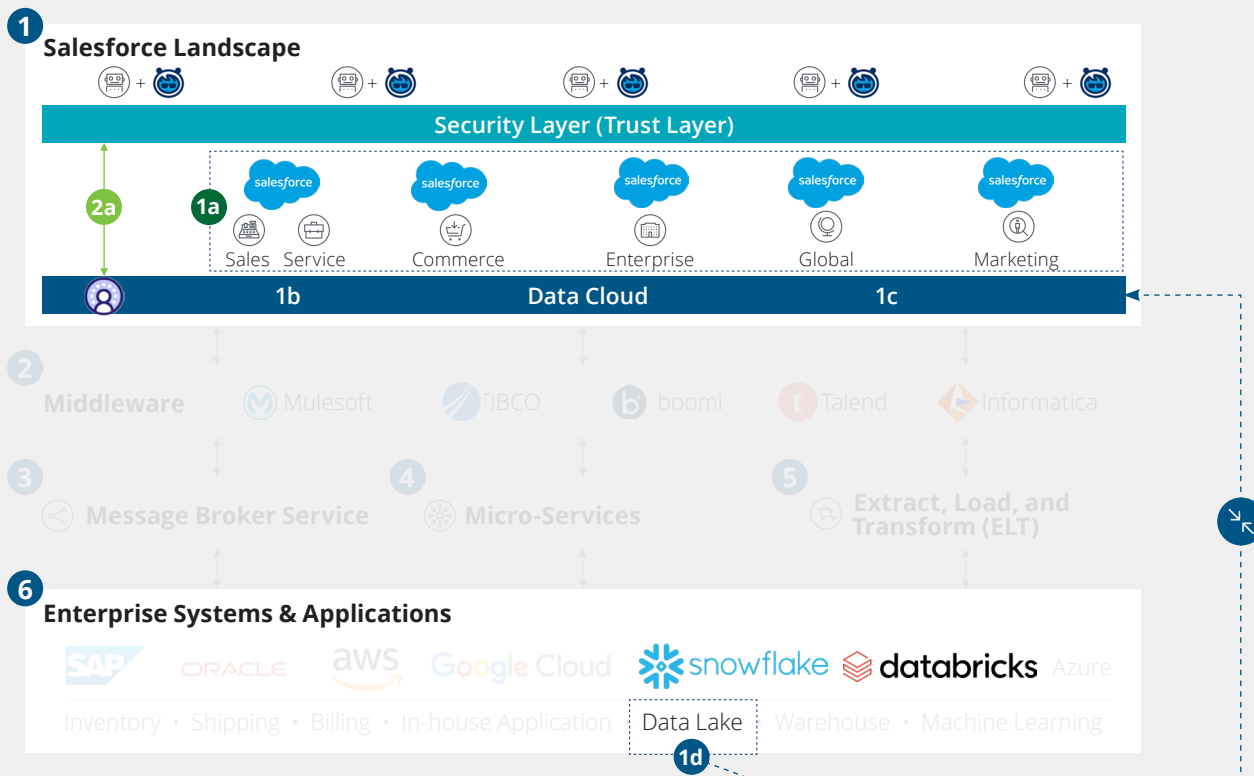
The organization has been using Salesforce AI capabilities for some use cases, but is now ready to augment its AI capabilities with an enhanced enterprise technology stack

Homegrown:

The organization has been preparing for AI integration by developing its enterprise capabilities and now seeks to use them within the Salesforce ecosystem

GREENFIELD BUCKET: NO AI CAPABILITIES

Today's organizations have a myriad of use cases available to explore, learn about, and implement AI capabilities to improve their business.



1a. Consolidate the organization's data:

Use Salesforce Data Cloud to connect and unify customer data across your technology landscape into one centralized enterprise organization.

1b. Create customer profiles:

Harmonize, transform, and segment data across enterprise systems to create a unified view of customers with data available in Salesforce applications.

1c. Bring Your Own Model (BYOM):

Once a customer profile is created, the Model Builder can be utilized to create customized models within Salesforce Data Cloud.

1d. Vector search:

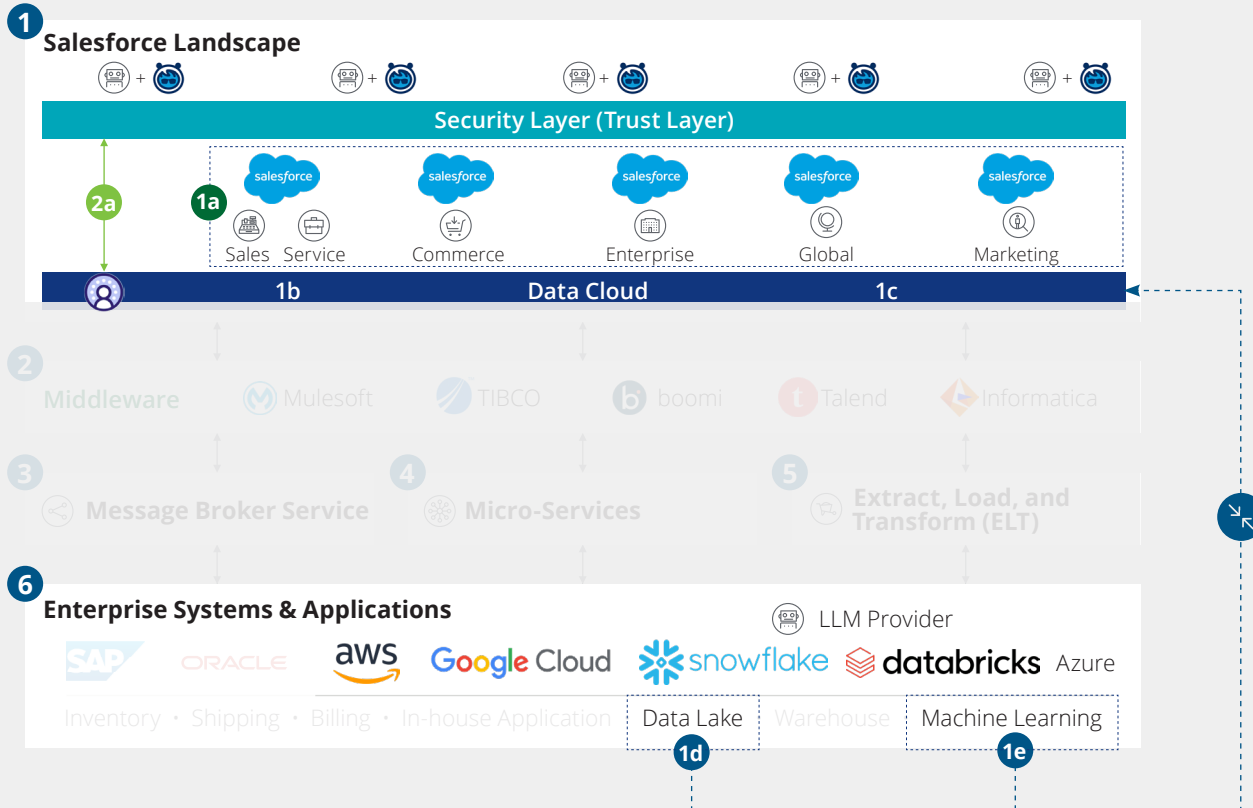
With configurable connectors, bring unstructured data—PDF, emails, and transcripts, for example—to a vector database. This data can be used with Einstein Search, and users can see results with Agentforce.

2a. Agentforce & Agent Studio:

With Agentforce and your LLM provider, transcribe natural conversational language into actionable tasks such as creating emails, updating records, and searching data. Embed the company's customer CRM data set to ground your prompts to reduce harmful hallucinations caused by AI responses.

HYBRID BUCKET: INCORPORATING CURRENT ENTERPRISE AI CAPABILITIES WITH SALESFORCE

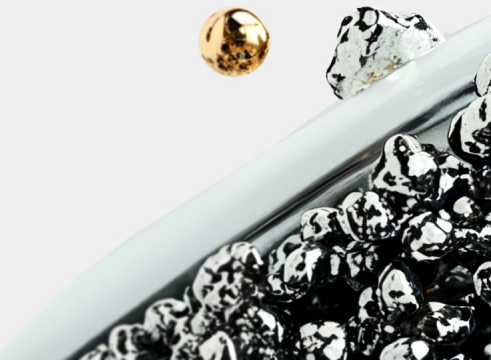
In this example, the Salesforce platform's AI capabilities listed above have been enabled to support some business processes and functionalities that can be further enhanced with the enterprise's homegrown AI capabilities. The hybrid AI bucket offers many identical use case options as the Greenfield bucket approach including consolidating the organization's data, creating customer profiles, vector searches, and more. There are also some new additions and slight variations.



All of the above Greenfield bucket capabilities/ functions

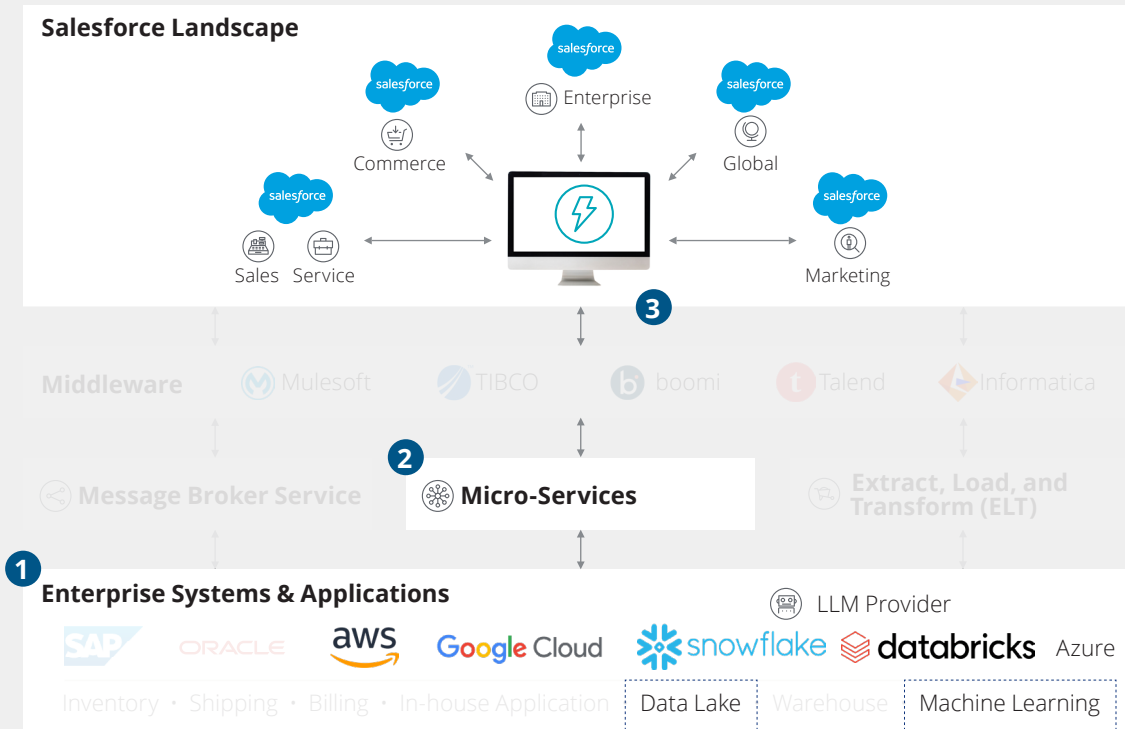
1.e Bring Your Own Model (BYOM):

Enhance Salesforce Data Cloud with enterprise AI models while avoiding duplicating data. Connectors are available for third-party hyperscalers.



HOMEGROWN BUCKET: USING ENTERPRISE AI CAPABILITIES WITHIN SALESFORCE

In the last few years, many business leaders have invested time and resources into pursuing the latest AI and ML advancements. They have also created robust AI capabilities at the enterprise layer, meaning they are well-versed in AI and want to take full advantage of the capabilities they have developed without introducing the complexity of another AI platform.



In this solution option, the enterprise is utilizing its internally developed AI capabilities, enabling the exploration of new use cases.

1. Use enterprise AI platforms and capabilities:

In the last few years, your enterprise has been investing resources to stay ahead of the latest advancements in AI. Your data scientist team has built machine learning models, and your team is leveraging one of the leading AI LLM across other enterprise platforms.

2. AI Integration:

Use microservices to expose APIs that will interact with your AI enterprise capabilities. Salesforce users will interact with a Custom Bot to facilitate the data input gathering, the integration with enterprise capabilities and platforms, and the enterprise AI responses.

3. Custom Bot:

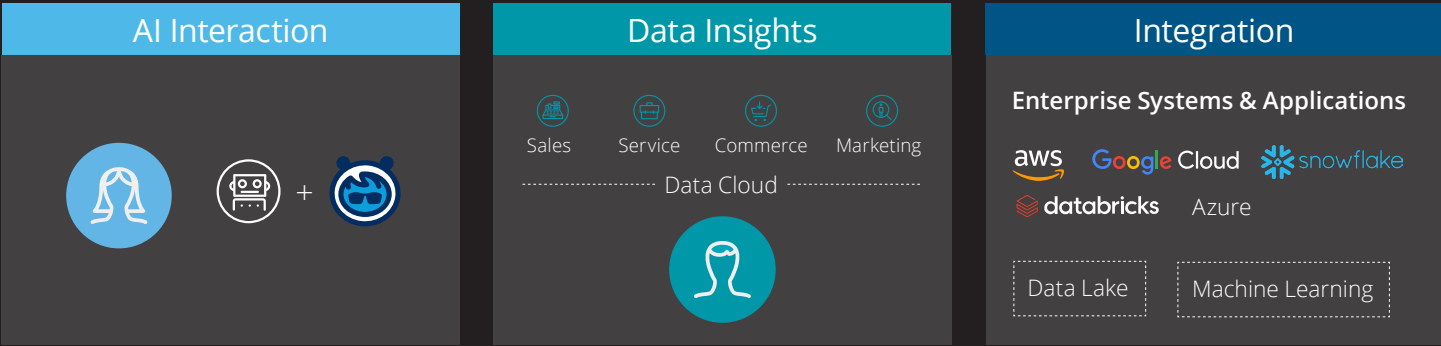
Use Lightning Web Components (LWC) in Salesforce to allow the user to interact with the enterprise AI and AI models. The Custom Bot will be developed using the platform's package approach so that the IT team can propagate the application metadata updates across other Salesforce applications.

Many organizations may want to adopt the hybrid model because they want to test the Salesforce platform’s offerings alongside the performance of their own homegrown AI investments. Salesforce offers easy “plug & play” solutions for these types of implementations.

EXAMPLE SCENARIO

Susana, a Sales Account Executive, is on a call with a long-time customer, Tom. She learns that Tom is changing his address and phone number. She starts interacting with Agentforce, asking it to update Tom’s account and contact data. Agentforce guides Susana through the account and contact record update process, which requires orchestration and integration with a backend system to validate the new address. Once the update is completed, Agentforce

interacts with the Customer Profile Model built in Salesforce Data Cloud to look through the customer’s history and find new promotions that apply to the customer’s new address. Susana tells her customer about the latest promotions in their area and creates an opportunity record. As a result, Tom is happy to have an opportunity to save money and makes a purchase, and Susana’s productivity and sales metrics have increased.



In this example with Susana and Tom, specific technology stacks and components are making the solution possible.

AI INTERACTION

Salesforce provided the user experience (UX) through which Susana could interact with Agentforce. This interaction is possible thanks to the prior work of the admin and development team, who used the tools available in Agent Studio to build prompt templates, a guided flow, and API integration. In this instance, the team is using Salesforce Agentforce powered by leading LLM provider and partner software available on the platform.

DATA INSIGHTS

The data architects used Salesforce Data Cloud to bring data across the Salesforce products and across the enterprise to create a unified customer profile for Tom, helping Susana better understand her customer’s needs. The ML model built in one of the hyperscalers ingested data from different applications and provided a predictive appetite score and related promotions. The data architect team brought the ML from their enterprise using the Salesforce Data Cloud Bring Your Own Model (BYOM) and combined it with the consolidated customer profile.



STEP 4:

Bringing it all together

Bringing Salesforce AI into enterprise architecture can result in potential benefits such as the centralization of customer data and the integration of data with Salesforce CRM capabilities to enhance the customer experience. The potential of AI, ML, and LLMs can optimize business operations by leveraging these functions in the Salesforce ecosystem.

To properly integrate Salesforce AI, it is important to first become familiar with the available Salesforce AI components, then evaluate the organization's level of readiness, and finally, synthesize these insights to form a cohesive data strategy. A holistic approach can be beneficial as it requires a comprehensive understanding of the technological components and their strategic placement within the business.

As with any transformation, continuous learning is essential to successfully integrating Salesforce AI into enterprise architecture. Business leaders can confirm that their AI integration efforts remain practical and cutting-edge by staying updated with the latest industry developments, adapting to new technologies such as Agentforce, iterating based on feedback, fostering collaboration, and utilizing available learning resources.

By following these steps and considerations, organizations can effectively integrate Salesforce AI into their architecture, enhancing their overall business operations, optimizing customer service capabilities, and—most importantly—elevating experiences for employees and customers alike.

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