

Agent Advantage™ for Salesforce

Elevate application experiences with
Application Intake Agent

BUSINESS CHALLENGE

Government program applications are often difficult for citizens and organizations to navigate. Applicants struggle to find the right information on agency websites, face complex forms with unclear requirements, and must submit extensive details – leading to frustration, errors and abandoned applications. Manual processes create bottlenecks for agencies as well, requiring staff to review incomplete or incorrectly filled submissions, delaying approvals and increasing administrative burdens. The lack of real time guidance results in back-and-forth queries, straining resources and slowing down the approvals. These inefficiencies can undermine the program accessibility, disproportionately affecting communities, while increasing compliance risks and operational costs for agencies.

AGENTIC SOLUTION

The application intake agent transforms the application filling process into a seamless experience by guiding users step-by-step through submission requirements. As a 24/7 virtual assistant, it helps applicants navigate complex forms by providing natural language explanations, auto filling fields using document scanning and validating entries in real time to prevent errors. For those unsure where to start, the AI agent offers personalized checklists and answers questions about eligibility or required documents. It proactively flags missing documents or details before submission, maintaining policy compliance, ensuring applications meet all criteria.

VALUE PROPOSITION

Effortless application completion for reduced drop-off rates

Guided user experience through complex forms with intuitive, conversational support reduces ambiguity, helping applicants confidently complete applications.

Improved submission quality and accuracy

Real time input validation and auto filled fields from uploaded documents facilitate accurate applications, reducing error, rework, delays and enables faster submissions.

Increased access and equity

Plain language explanations and inclusive prompts makes the application filling process accessible to users with varying literacy and digital comfort levels.

Reduced processing time and administrative burden

Improved submission completeness and accuracy dramatically cuts down on manual follow ups and backlogs – freeing staff to focus on higher value activities.

AGENT CAPABILITIES



Interactive guidance with conversational UI

AI agent provides dynamic conversational prompts to guide applicants through each section of the form based on real time user input and required submission input logic.



Pre-screening for basic eligibility

AI Agent engages user in a short series of policy-based questions to help determine if they meet the minimum eligibility criteria before initiating the full application process.



Intelligent document scanning and auto-fill

AI Agent uses OCR to extract relevant data from uploaded documents and populates the form fields with validated information.



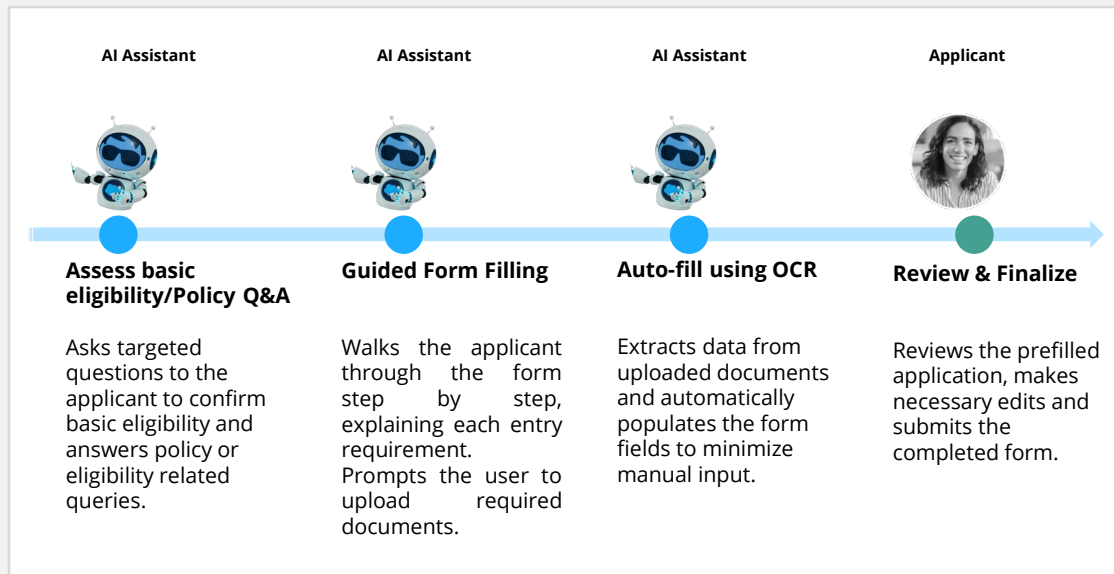
Real time field validation and error detection

AI agent verifies the entered details highlighting missing, incorrect or non-compliant entries instantly to help reduce errors at the point of entry.



Real time policy Q&A support

AI agent answers applicant questions about program rules, eligibility criteria.



Reid Exley

VP – Product Management
Deloitte Consulting LLP
rexley@deloitte.com

Geetika Malik

Product Manager
Deloitte Consulting LLP
gemalik@deloitte.com

As used in this document, "Deloitte" means Deloitte Consulting LLP, a subsidiary of Deloitte LLP. Please see www.deloitte.com/us/about for a detailed description of our legal structure. Certain services may not be available to attest clients under the rules and regulations of public accounting.

This presentation contains general information only and Deloitte is not, by means of this presentation, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This presentation is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor.

Deloitte shall not be responsible for any loss sustained by any person who relies on this presentation.

Agent Advantage™ for Salesforce

Turbocharge grant reviews with
Application Scoring Agent

BUSINESS CHALLENGE

Government grant programs face critical inefficiencies in application processing, from lengthy reviews to inconsistent decision making. Reviewers often struggle with overwhelming application volumes, leading to delays in fund disbursement. Subjective scoring introduces bias, as different reviewers interpret criteria differently, undermining fairness and trust in the system. Compliance verification becomes error prone as reviewers navigate complex regulations across multiple programs. These inefficiencies can drain agency resources, reduce public trust in funding fairness and ultimately prevent grants from achieving their full social impact.

AGENTIC SOLUTION

The Application Scoring AI agent provides an efficient and fair scoring solution to take the “first pass” on incoming applications. It meticulously analyses submissions, scores them based on predefined criteria, detects inconsistencies, and facilitates adherence to funding eligibility guidelines – to deliver consistent, unbiased pre-screening. Reviewers retain full control over funding decisions and can focus on nuanced evaluations and strategic decision making, as the time-consuming initial assessments are handled by the AI agent, dramatically accelerating processing times.

VALUE PROPOSITION

Accelerate grant reviews with consistent outcomes

Enhance the grant application review timelines while maintaining the highest standards of assessment quality and compliance verification

Unbiased reviews for equitable grants distribution

Implement systematic, criteria-based evaluation protocols that minimize subjective biases and facilitate consistent review treatment for all applications.

Reallocate human expertise to high value judgements

Redirect reviewers' efforts from administrative tasks to substantive evaluation of program impact and merit-based considerations.

Comprehensive compliance documentation for public accountability

Generate auditable transparent decision logs with detailed scoring rationales to support reviews.

Scalable AI agents and configurable scoring framework designed for effortless adoption

Enable easy set-up and adoption for new programs – just upload the scoring instructions and stand up your AI agent with minimal prompt adjustments.

AGENT CAPABILITIES



Pre-screen applications

AI agent performs an initial review of the application- verifying completeness, validating documentation and assessing baseline eligibility – so that by the time application reaches the reviewer, all foundational checks have been completed.



Evaluate and justify scores

AI Agent autonomously scores the applications across predefined scoring rubrics to generate rationale-based justifications for each score, giving reviewers full transparency into how scores were derived.



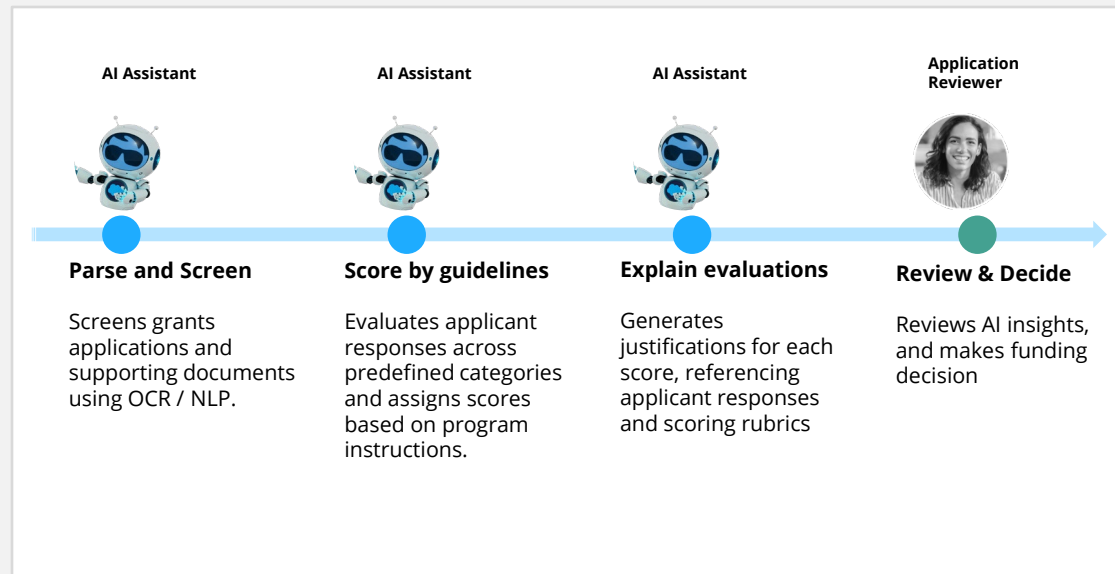
Interactive guidance

AI Agent responds to reviewer queries in real time, clarify planning policy guidelines, explaining scoring logic and surfacing relevant documentation to support reviewer decisions - minimizing delays and reducing the cognitive load on the reviewers.



Dynamic scoring rubric

The agent executes scoring rules from uploaded guidelines, allowing easy adjustments to evaluation parameters, or scalability to new programs.



Reid Exley

VP – Product Management
Deloitte Consulting LLP
rexley@deloitte.com

Geetika Malik

Product Manager
Deloitte Consulting LLP
gemalik@deloitte.com

As used in this document, "Deloitte" means Deloitte Consulting LLP, a subsidiary of Deloitte LLP. Please see www.deloitte.com/us/about for a detailed description of our legal structure. Certain services may not be available to attest clients under the rules and regulations of public accounting.

This presentation contains general information only and Deloitte is not, by means of this presentation, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This presentation is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor.

Deloitte shall not be responsible for any loss sustained by any person who relies on this presentation.

Agent Advantage™ for Salesforce

Elevate case management with
Case Worker Assistant



BUSINESS CHALLENGE

Government and public sector agencies are inundated with a continuous stream of complex and sensitive cases. The primary challenge lies in the initial triage and management of this volume. Manual processes for reviewing case files are inherently slow, creating significant bottlenecks and delays. Vital information is often scattered across unstructured documents, emails, and forms, making it difficult to quickly grasp the complete picture. This can lead to inconsistent handling, critical details being overlooked, and a high risk of error, ultimately hindering the agencies' ability to act swiftly and effectively on behalf of the public.

AGENTIC SOLUTION

The caseworker assistant is designed to revolutionize public sector case management. It begins by ingesting new cases, immediately verifying their completeness, and confirming all necessary information and documents are present. The agent then analyzes the content, using advanced reasoning to create a verified, clear, and concise summary that captures the core of the issue. Based on this analysis and predefined instructions, it dynamically determines and suggests the precise next steps required to advance the case. Furthermore, it acts as an interactive resource, allowing users to chat with it to get immediate answers and clarity, facilitating smooth and efficient progression from intake to resolution.

VALUE PROPOSITION

Informed and accelerated decisions for faster, fairer outcomes

Provides data driven insights and suggestions that strengthen and accelerate judgement, reduce processing time to enable the citizens receive timely benefits and support when they need it the most.

Stronger citizen trust through timely and transparent service

Improves citizen experience through faster responses and fairer outcomes building confidence in public services

Reduced administrative burden for empowered workforce

Elevates caseworkers from repetitive administrative tasks to higher value judgment, giving them the capacity and confidence to serve with greater impact .

Adaptable Case Handling

Provides agility by allowing rapid updates to rules and instructions ensuring the system evolves effectively with policy changes

Operational Resilience for scalable, reliable service delivery

Strengthens service delivery by maintaining accuracy and quality even under rising caseloads or shifting demand

AGENT CAPABILITIES



Intelligent case summary

The AI agent generates a concise narrative from the complex case details to accelerate reviewer onboarding.



Workflow guidance

AI agent analyzes the case context and the provided rule book to recommend next best action, empowering agents to resolve cases faster and more effectively.



AI generated communication drafts

AI agent generates personalized customer correspondence from requests for information to supplement official decision notices.



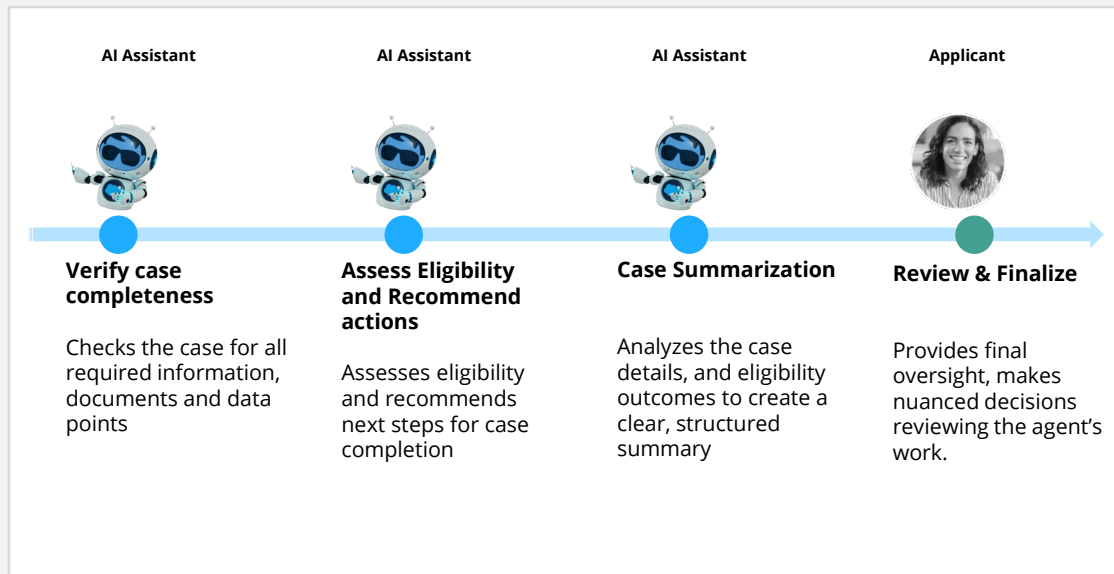
Proactive eligibility triage

AI agent conducts instant preliminary eligibility assessments, highlighting qualifying factors and pinpointing critical gaps in meeting the criteria, before human review.



Document integrity validation

AI agent scans and verifies submissions for completeness flagging discrepancies in real-time to case records.



Reid Exley

VP – Product Management
Deloitte Consulting LLP
rexley@deloitte.com

Geetika Malik

Product Manager
Deloitte Consulting LLP
gemalik@deloitte.com

As used in this document, "Deloitte" means Deloitte Consulting LLP, a subsidiary of Deloitte LLP. Please see www.deloitte.com/us/about for a detailed description of our legal structure. Certain services may not be available to attest clients under the rules and regulations of public accounting.

This presentation contains general information only and Deloitte is not, by means of this presentation, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This presentation is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor.

Deloitte shall not be responsible for any loss sustained by any person who relies on this presentation.

Agent Advantage™ for Salesforce

Transform application reviews with
Image and Document Inspector Agent

BUSINESS CHALLENGE

Public Sector application reviews have long relied on manual inspection of submitted documents and images. This traditional approach is often time consuming, labor intensive and susceptible to human error. Reviewers must painstakingly compare application form fields with supporting visual evidence, increasing the potential risk of inconsistencies, missed anomalies and delayed processing times. As application volumes grow, manual reviews struggle to keep pace, which can lead to bottlenecks, reduced accuracy and diminished public trust in the process.

AGENTIC SOLUTION

The Image and Document Inspector Agent brings AI powered automation to the application review process. It autonomously extracts and analyzes data from submitted documents and images using advanced Optical Character Recognition (OCR). The agent cross verifies this information with application fields and checks for policy compliance in real time. Each review is summarized with clear, actionable insights, highlighting any discrepancies or compliance issues - accelerating decisions, reducing errors, and restoring trust in public sector application reviews.

VALUE PROPOSITION

Expedite reviews with consistent and reliable outcomes

Experience dramatically reduced turnaround times for application reviews, reducing human oversight and enabling regulatory compliance so that reviews are accurate, compliant, and completed in record time.

Maximize Human Impact and Productivity

Free up human reviewers from tedious manual reconciliation, allowing them to accomplish more in less time and focus on higher value, judgement-based tasks

Effortless Technology Adoption

Native Salesforce OCR helps reduce the setup and security challenges of third-party OCR integration – enabling faster, simpler and secure document processing.

Strengthened Public Confidence and Trust

Raise service standards with reliable, transparent and timely application outcomes.

AGENT CAPABILITIES



Intelligent OCR and AI powered data extraction from images and documents

AI agent uses advanced OCR to convert unstructured files such as scanned forms, photos, ID proofs into structured data.



Evidence-based field validation

AI Agent compares extracted document data with application form entries to ensure alignment, confirming application data integrity.



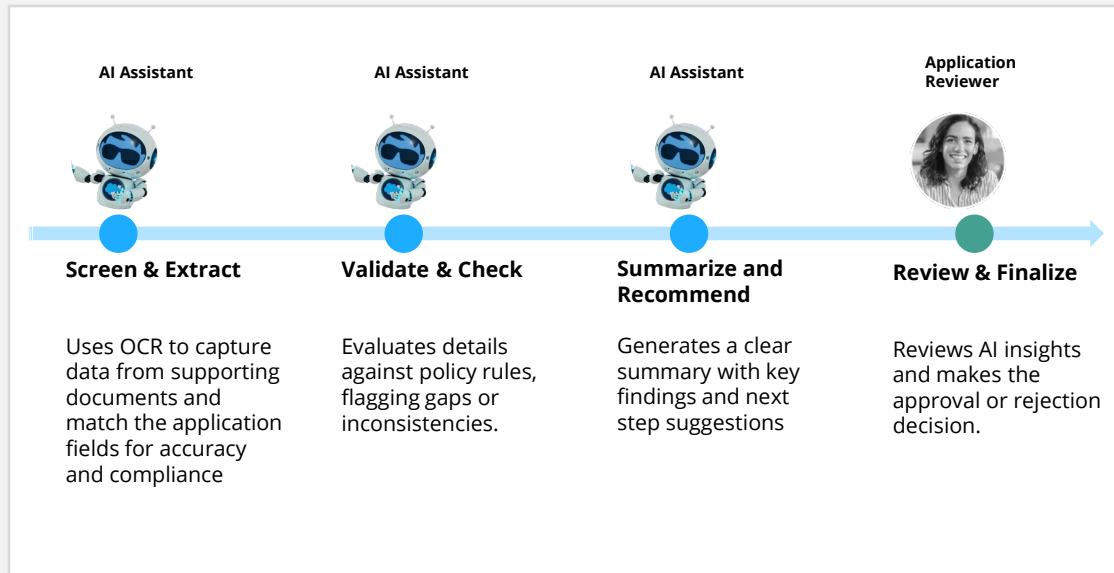
Policy-driven compliance validation

Verifies if each document and application data complies with eligibility and regulatory standards, highlighting discrepancies and summarizing findings with actionable insights.



Insight driven decision support

The agent reviews the application and generates concise review summaries and next steps surfacing key findings and compliance status, enabling reviewers to act decisively with speed and confidence.



Reid Exley

VP – Product Management
Deloitte Consulting LLP
rexley@deloitte.com

Geetika Malik

Product Manager
Deloitte Consulting LLP
gemalik@deloitte.com

As used in this document, "Deloitte" means Deloitte Consulting LLP, a subsidiary of Deloitte LLP. Please see www.deloitte.com/us/about for a detailed description of our legal structure. Certain services may not be available to attest clients under the rules and regulations of public accounting.

This presentation contains general information only and Deloitte is not, by means of this presentation, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This presentation is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor.

Deloitte shall not be responsible for any loss sustained by any person who relies on this presentation.