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Deloitte Digital's perspective on Salesforce Agentforce Marketing

***AN ADOPTION GUIDE FOR SALESFORCE'S LATEST AGENTIC
MARKETING PLATFORM***

Agentforce Marketing is Salesforce’s next-generation agentic marketing solution for customer engagement—a platform designed to help evolve how organizations unify data, empower teams, and deliver impactful, real-time experiences across every channel.

At Deloitte Digital, we harness our powerful collaboration with Salesforce to help our clients navigate the opportunities and considerations that can come with this next-generation agentic marketing platform.

Salesforce’s agentic marketing vision is realized through Agentforce, Data 360, and their metadata platform, operating in concert with Agentforce Marketing. This unified platform enables marketers to connect and personalize conversations across the entire customer lifecycle, enabling two-way conversations and increased efficiency.

SECURITY	BUSINESS & CUSTOMER DATA	MARKETING APPS	AI AGENTS
<p>METADATA PLATFORM</p> <ul style="list-style-type: none"> Custom apps & agents AI & models Flow automation Omnichannel UI Security & privacy Analytics 	<p>DATA 360</p> <ul style="list-style-type: none"> Structured & unstructured Zero copy Unified profiles AI governance Search & RAG Real-time segments 	<p>NEW</p> <p>AGENTFORCE MARKETING</p> <ul style="list-style-type: none"> Customer intelligence Insights & optimization Marketing Orchestration Digital Advertising Owned Channels Personalization experiences Marketing Operations 	<p>AGENTFORCE</p> <ul style="list-style-type: none"> Streamlined campaign creation Generate briefs & audiences Autonomous 1-1 personalization Real-time recs & offers 24/7 omnichannel conversations Always-on lead gen Self optimizing campaigns

“ Agentforce Marketing unlocks the power of a unified platform built on Data 360— enabling two-way engagement and adaptive experiences that strengthen customer loyalty by connecting sales, service, marketing, commerce and loyalty.”

Kevin Siminski, SVP & CCO, Agentforce Marketing, Salesforce



Use Cases for Agentic Marketing

There are a few key use cases and strategic drivers for which Salesforce Agentic Marketing and Data 360 can be a compelling choice for your organization.



I WANT TO MODERNIZE & AUTOMATE...

- Sales Cloud or Service Cloud customers that want to **automate email/SMS/WhatsApp campaigns**
- Existing Marketing Cloud customers that want to **leverage Generative AI features** and move to a **real-time data-driven architecture**
- Organizations with **outdated marketing platforms** that lack automation
- Organizations that want differentiating capabilities such as **lead generation and scoring, two-way SMS, embeddable forms and improved landing pages**



I WANT TO INTEGRATE & CENTRALIZE...

- Organizations **leveraging Data 360** that want to activate and personalize across channels
- Organizations that want to **centralize campaign and content management and marketing attribution reporting** in a single platform
- Organizations that need to **consolidate data sources to enable unified customer profiles**, more effective segmentation and marketing



I WANT TO PERSONALIZE & EXPAND...

- Organizations that want to deliver **personalized, real-time, right-time experiences across channels** leveraging AI for targeted marketing and improved engagement
- Organizations that want to better manage **consent and preferences** and need more **robust and auditable consent management**
- Organizations that want to **better leverage first-party data** for insights, **real-time analytics**, and actionable intelligence
- Organizations that want to **expand digital channels, markets**



Future state architecture with Agentforce Marketing

The building blocks illustrated below represent a convergence with Agentforce Marketing in a future state for organizations that are already leveraging Marketing Cloud today. Flows can be used to orchestrate and automate journeys and connect data, logic, and actions across solutions that leverage Data 360 data to trigger, prioritize, and update journeys based on customer behaviors. Marketing Cloud Engagement can continue to co-exist in parallel to Agentforce Marketing with Salesforce Journey Builder, powering existing multi-step campaigns.

AGENTFORCE

Agentforce is a complete, extensible, and open platform, letting you build and deploy digital labor for your customers and employees leveraging the existing workflows, data, and integrations that power your business today.



Agentforce

AI AGENTS

SMS Email Mobile Web WhatsApp

ACTIVATION CHANNELS

ACTIVATION CHANNELS

The ability to deliver personalized customer experiences across any channel or customer touchpoint in an automated way.

JOURNEY BUILDER

Journey Builder will continue to power personalized, automated multi-step campaigns that adapt to customer behaviors and drive engagement across channels.



JOURNEY ORCHESTRATION ENGINE

FLOW

Flows will be used to automate journeys by connecting data, logic, and actions across applications, leveraging unified Data 360 data to trigger, prioritize, and update journeys based on customer behaviors.

MARKETING CLOUD ENGAGEMENT

Leverage Journey Builder for Journey orchestration, with Flows as a first step and Deloitte's MPA Accelerator Agent for intelligent campaign briefs and agentic journey creation.

Deloitte
MPA

Marketing
Cloud

Agentforce
Marketing

MARKETING PLATFORMS

MARKETING CLOUD NEXT

Email automation tool and next generation marketing automation platform built on top of Data 360. It brings agentic marketing to life with actionable data, cross-departmental workflows, and autonomous AI agents leveraging Slack OS including campaign creation, orchestration, activation and optimization agents.

DATA 360

Data 360 serves as a shared data layer across marketing platforms, consolidating engagement data to provide a single source of truth for segmentation.



Data
360

DATA FOUNDATION / DATA LAYER



Taking the first step: Adoption strategies

The preferred strategy for driving adoption to Agentforce Marketing will depend on each organization's unique business objectives, technical landscape, and readiness for change to ensure smooth and successful adoption. Organizations may consider a gradual or accelerated to Agentforce Marketing based on organization readiness and Agentforce Marketing feature availability. We can help our clients choose the most effective approaches for their industries and organizations.

GRADUAL APPROACH TO AGENTFORCE MARKETING

A gradual approach is a strategy that can help organizations with complex marketing operations, or that have existing investments in Marketing Cloud. With this approach, Agentforce Marketing and the current Salesforce Marketing Cloud (Marketing Cloud Engagement or Marketing Cloud Account Engagement) are used in parallel as part of the customer's convergence journey. This approach allows organizations to innovate at their own pace, ensuring business continuity while exploring the latest features of Agentforce Marketing.

Organizations can incrementally build campaigns, flows, and channels on Agentforce Marketing by embracing the following steps

- Start with simpler use cases: Begin with less complex journeys or single-channel campaigns to build foundational expertise and confidence with Agentforce Marketing.
- Leverage Agentforce Marketing for advanced use cases: In parallel with Marketing Cloud Engagement or Marketing Cloud Account Engagement, leverage the advanced landing page and generative AI capabilities to augment an existing martech stack.
- Follow a test and learn approach: Pilot new features and capabilities in a controlled environment, gathering feedback and optimizing processes before broader rollout.
- Leverage parallel operation: Run your current marketing solution alongside Agentforce Marketing, minimizing disruption and ensuring business continuity.
- Drive adoption: Enable gradual upskilling and change management, fostering adoption and organizational buy-in.

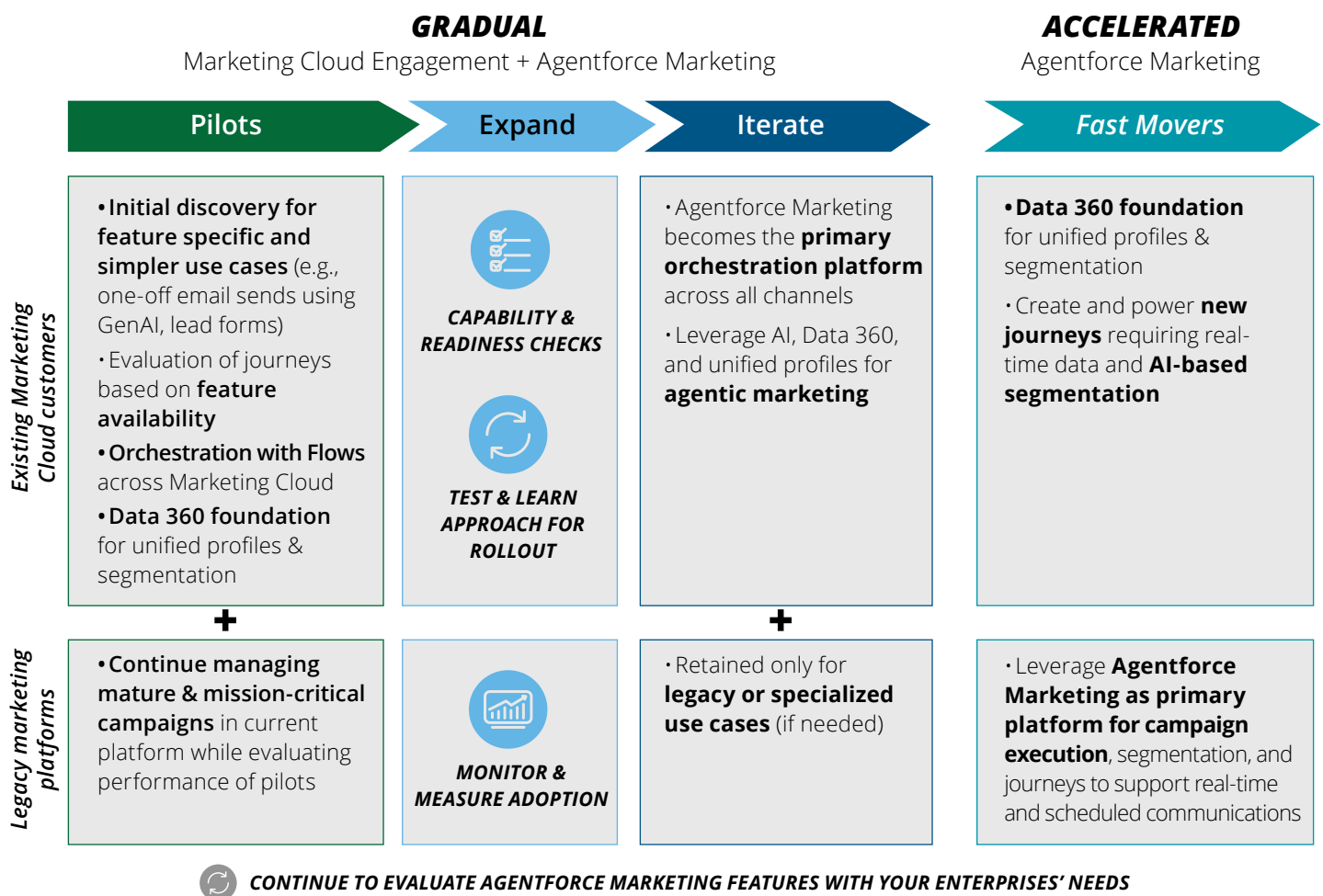


ACCELERATED DEPLOYMENT OF AGENTFORCE MARKETING

An accelerated deployment of Agentforce Marketing may be suitable for organizations that:

- Desire immediate access: Require rapid adoption of advanced features of Agentforce Marketing such as agentic workflows, AI-driven personalization, and unified data
- Have limited legacy complexity: Possess relatively simple or less-entrenched legacy marketing operations, reducing migration risk
- Have invested in a legacy solution: Organizations that are re-platforming to Salesforce's agentic marketing stack or are undergoing a broader digital transformation

Adoption strategies based on your specific needs



GETTING STARTED WITH FLOWS

For customers ready to get started, flows in Agentforce Marketing can provide a robust framework to help orchestrate journeys that are activated based on client behavior. Customers can start leveraging this capability immediately with capabilities such as flow, journey orchestration, and automated journey triggers.



Key considerations

We've compiled a list of the top considerations for organizations as they prepare for Agentforce Marketing, starting with investing in the Salesforce Data 360 platform. Data 360 serves as the foundation for agentic capabilities across Salesforce—it is essential for unifying, harmonizing, and activating customer data at scale. This helps enable intelligent automation, personalized experiences, and easy integration of AI-driven solutions throughout the Salesforce ecosystem.



DATA 360 ENVIRONMENT

Agentforce Marketing is built on top of the Data 360 platform. Data 360 is a core component of Agentforce Marketing features and functionality and personalization engine



CAMPAIGNS & JOURNEYS

Existing Journey Builder and new Agentforce Marketing Campaign Flows with Data 360 can be used in parallel to support innovative use cases and existing journeys



CONSENT MANAGEMENT

Agentforce Marketing leverages Data 360, unified customer profiles, and robust preference center for attribute-level consent tracking



CONTENT & ASSETS

With Agentforce Marketing, the Salesforce CMS provides seamless content creation, management and distribution across channels



CUSTOM CODE, AUTOMATIONS & INTEGRATIONS

Evaluate custom code, automations and integrations to determine compatibility; and assess what needs to be refactored or rebuilt to take advantage of new features in Agentforce Marketing

KEY CONSIDERATIONS FOR CUSTOMERS

Data 360 serves as the foundation for Agentforce Marketing and agentic capabilities across Salesforce, and is essential (and required) for unifying, harmonizing, and activating customer data at scale—enabling intelligent automation, personalized experiences, and seamless integration of AI-driven solutions throughout the Salesforce ecosystem.

WHERE SHOULD I START?

- Orchestrate journeys with Flows
- Confirm / Invest in Data 360
- Inventory existing campaigns
- Evaluate consent requirements
- Consider asset re-use / re-build scenarios
- Determine custom code and integration compatibility

Agentforce Marketing readiness checklist

DATA 360 ENVIRONMENT

- Confirm **Data 360 licensing** and environment setup
- Plan for **data unification, identity resolution** and **segmentation**
- Evaluate **privacy policies, data governance, security protocols** and **sandbox** needs
- Marketing Cloud Engagement Customers should **evaluate identity stitching rules and BU and Data Space Mapping** in Data 360 and Agentforce Marketing as they move from channel-based (Data Extensions, Prospects, Lists) to **unified profiles** and more flexible data hierarchy models

CAMPAIGNS & JOURNEYS

- **Inventory current campaigns** (emails, templates, journeys, and automations)
- Evaluate **orchestration** across existing Marketing Cloud Engagement journeys in Journey Builder with **flows**
- Evaluate **building new flows** to enhance **segmentation** and **personalization**

CONSENT MANAGEMENT

- **Validate data privacy** regulations (GDPR, CCPA, etc.) and industry standards
- Plan **consent management across touchpoints** (web, mobile, email, offline, third-party)
- Assess how consent and preference data will be **mapped** to the centralized model in Data Cloud and Marketing Cloud Next
- Determine how consent data will be **shared with external systems**

CONTENT & ASSETS

- **Configure content workspaces**, content types, asset mapping, metadata tagging and version control in Salesforce CMS
- **Audit current Marketing Cloud Engagement assets** (emails, templates, content blocks)
- Assess **asset re-use** of email templates, landing pages and dynamic content
- **Rebuild assets** in Salesforce CMS (brand templates, re-usable content, omni-channel campaign assets)

CUSTOM CODE, AUTOMATIONS & INTEGRATIONS

- Assess **compatibility** of current code and determine if **update** is required for **legacy scripting** (AMPScript, Server-Side Java Script)
- **Evaluate if legacy REST/SOAP** calls need **refactored** to leverage new/updated APIs
- Consider **credit consumption, API usage, connector configuration**, and data sync schedules



Kickstarting your journey with Deloitte Digital

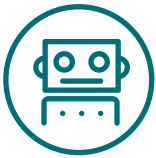
As organizations set their future strategic vision for marketing, this is a significant opportunity for them to re-imagine journeys, segments, and engagement with the new agentic capabilities of Salesforce Agentforce Marketing and Data 360. Coupled with our robust assets and accelerators at Deloitte Digital, this collaboration can help our clients be well-equipped to embrace the future of marketing-powered, data-driven insights.

Deloitte Digital is here to help you embrace this exciting future and unlock new possibilities for your marketing technology. To fast-track your journey, we've introduced a suite of industry-specific pre-built Agent Advantage™ agents built on Agentforce.



DELOITTE DIGITAL PLATFORM DIAGNOSTICS

Our Platform Diagnostics tool helps organizations diagnose existing Marketing Cloud Engage usage and provides usage recommendations, enhancing monitoring and minimizing disruptions.



DELOITTE DIGITAL ASSET PORTER

Our Asset Porter supports the easy movement of email assets tagged to campaigns or folders from Marketing Cloud Engage to Agentforce Marketing.



DELOITTE DIGITAL AGENT ADVANTAGE™ - MARKETING PRO AGENT

For existing Marketing Cloud Engagement customers, our agent unlocks agentic brief and journey creation by rapidly constructing complex journeys, generating intent-based AI content, and delivering intelligent recommendations for

Closing thoughts

With Salesforce Agentforce Marketing and Deloitte Digital Agent Advantage™, your organization can be positioned to unify data, empower teams, and deliver real-time customer experiences. By leveraging proven strategies and proprietary tools, we can help you drive a smooth transition and work towards maximizing your marketing impact.



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GET IN TOUCH

Ready to get started with Agentforce Marketing? Connect with our Deloitte Digital leaders to learn how we can help you achieve your marketing goals and drive business impact.

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