



Lead the next era of customer service with AI

Deploying AI agents at scale with Salesforce

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Artificial intelligence (AI) continues to quickly reshape what customers expect from service organizations and how teams deliver on those expectations. Customer service organizations face growing pressure to address complex needs while improving efficiency, elevating the customer experience and unlocking new value.

Though AI represents a major opportunity for innovation and growth, many customer service leaders are still determining how to implement AI capabilities in ways that create true transformation and business value. The new Deloitte Digital playbook, **The Future of Service: The Age of Intelligent Experience**, explores the steps service organizations can take to translate AI advances into measurable return on investment (ROI) while delivering elite customer experiences at scale.

Deloitte Digital's deep sector experience and data-driven insights, combined with Salesforce solutions help our service clients achieve tangible business value through AI transformation.

Salesforce's enterprise agentic AI service solution, Agentforce Service, is built to help organizations deploy autonomous AI agents into their workflows. When combined with Deloitte Digital's implementation experience, this opens the door for service organizations to bring together humans, agentic AI and data to elevate the customer experience.

With Agentforce Contact Center, a key component of Agentforce Service, organizations can deploy agentic-powered customer service at scale through capabilities such as:

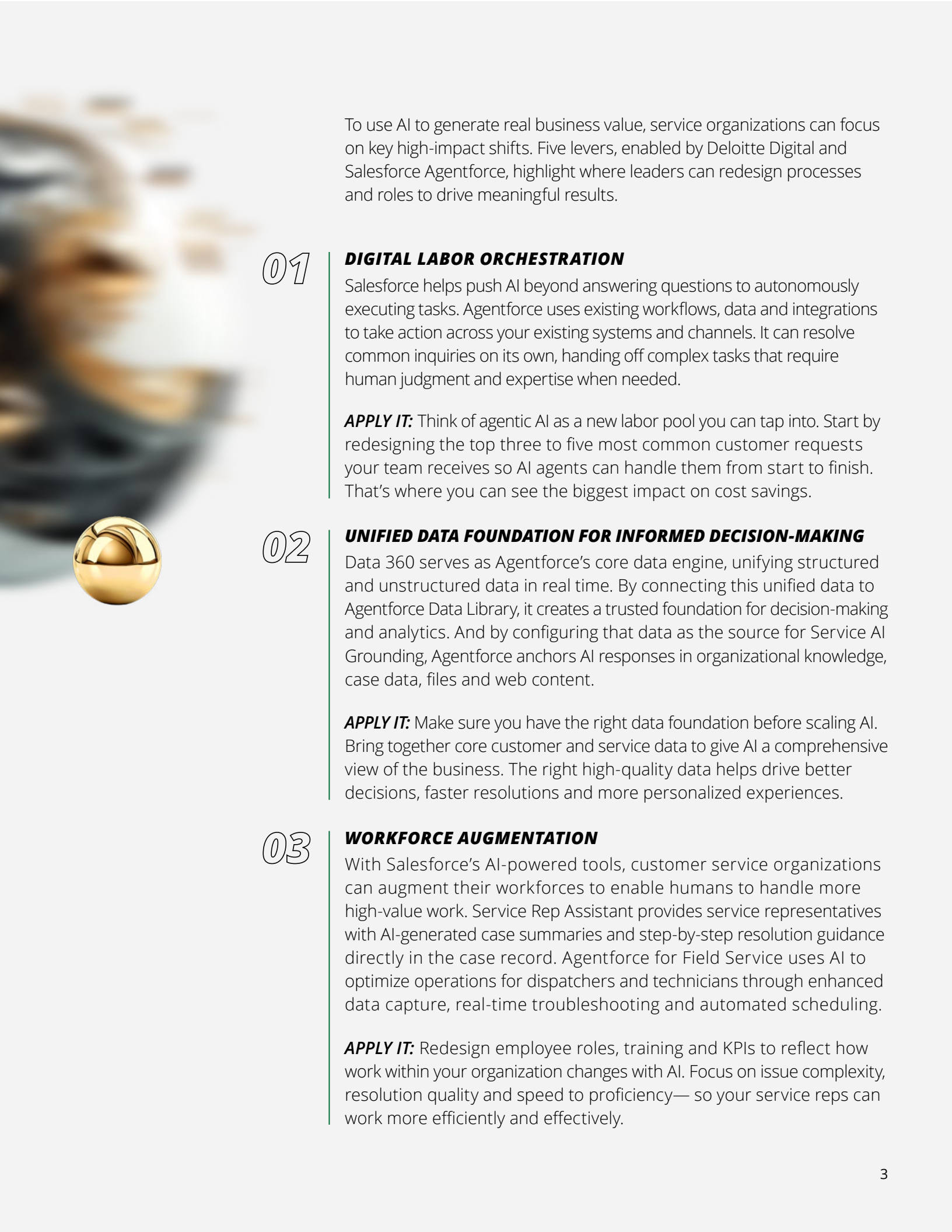
- **Intelligent self-service portals with real-time insights and solutions for routine case deflection**
- **AI-powered service for 24/7, multilingual conversational issue resolution**
- **Support task automation with prebuilt workflows built using agent-first protocols such as model context protocol (MCP)**
- **AI-enabled voice customer experiences with natural speech and minimal latency**
- **Field service enhancements for predictive and proactive maintenance**
- **Human Resources service management using AI for automation and predictive analytics**

With Agentforce Contact Center, Salesforce unifies voice, digital channels, customer relationship management (CRM) context and AI agents in one environment. These redesigned workflows and roles help AI agents and humans work together at scale to deliver measurable business outcomes.

Salesforce Headless 360 goes even further to securely allow agentic models and systems to utilize Salesforce-managed data and services.

Deloitte Digital supports these agentic AI service implementations by helping organizations prioritize AI agent use cases, manage risk and governance, establish data and infrastructure architecture and oversee employee change management.





To use AI to generate real business value, service organizations can focus on key high-impact shifts. Five levers, enabled by Deloitte Digital and Salesforce Agentforce, highlight where leaders can redesign processes and roles to drive meaningful results.

01

DIGITAL LABOR ORCHESTRATION

Salesforce helps push AI beyond answering questions to autonomously executing tasks. Agentforce uses existing workflows, data and integrations to take action across your existing systems and channels. It can resolve common inquiries on its own, handing off complex tasks that require human judgment and expertise when needed.

APPLY IT: Think of agentic AI as a new labor pool you can tap into. Start by redesigning the top three to five most common customer requests your team receives so AI agents can handle them from start to finish. That's where you can see the biggest impact on cost savings.

02

UNIFIED DATA FOUNDATION FOR INFORMED DECISION-MAKING

Data 360 serves as Agentforce's core data engine, unifying structured and unstructured data in real time. By connecting this unified data to Agentforce Data Library, it creates a trusted foundation for decision-making and analytics. And by configuring that data as the source for Service AI Grounding, Agentforce anchors AI responses in organizational knowledge, case data, files and web content.

APPLY IT: Make sure you have the right data foundation before scaling AI. Bring together core customer and service data to give AI a comprehensive view of the business. The right high-quality data helps drive better decisions, faster resolutions and more personalized experiences.

03

WORKFORCE AUGMENTATION

With Salesforce's AI-powered tools, customer service organizations can augment their workforces to enable humans to handle more high-value work. Service Rep Assistant provides service representatives with AI-generated case summaries and step-by-step resolution guidance directly in the case record. Agentforce for Field Service uses AI to optimize operations for dispatchers and technicians through enhanced data capture, real-time troubleshooting and automated scheduling.

APPLY IT: Redesign employee roles, training and KPIs to reflect how work within your organization changes with AI. Focus on issue complexity, resolution quality and speed to proficiency— so your service reps can work more efficiently and effectively.

04

PROACTIVE SERVICE ORCHESTRATION

Salesforce can help service organizations shift to a proactive operating model. Proactive Service responds to real-time data changes and operates autonomously in the background. Data 360 within Agentforce can be leveraged to analyze customer and product signals, anticipate service needs and guide customers to resolution before they contact the business.

APPLY IT: Identify common service issues that can easily be prevented. Set up your systems to recognize these moments and automatically respond through proactive outreach or guided resolution—or by resolving the issue in the background before the customer notices the problem.

05

SERVICE MOMENTS MONETIZATION

Salesforce can turn service into a growth lever. Agentforce's Next Best Action feature surfaces tailored recommendations such as repairs, discounts or add-on services at the right moment. These recommendations can be integrated into revenue generation capabilities including quoting, contracting, ordering, invoicing, and billing support.

APPLY IT: Treat every service interaction as an opportunity for retention, renewal or expansion. Embed offer logic, renewal logic and service-to-sales handoff rules directly into service workflows to create value during each interaction, not after it.



Accelerate AI adoption with Deloitte Digital

Together, Deloitte Digital and Salesforce can transform support organizations and customer experience where AI agents go beyond a front-end assistant model to executing the work across service workflows, including routing cases, orchestrating service transactions, updating records and responding to customers.

Deloitte Digital helps clients quickly unlock value from Agentforce Service with a suite of services ranging from use case identification to full-spectrum implementation.

DELOITTE DIGITAL AGENT ADVANTAGE™

Our Salesforce Assets & Solutions Group offers industry-specific, prebuilt accelerators for Agentforce, each designed to help clients solve their real issues and quickly realize tangible value from their investments.

We provide agentic AI solutions for customer service that can help employees initiate customer contact, handle queries, coordinate meetings and much more. Agents can enhance the full customer service experience with automated, real-time personalization driven by timely and accurate responses. Agents include:



TrueServe™, Deloitte Digital's contact center accelerator and orchestration platform, helps organizations rapidly design, deploy and scale AI-powered service capabilities.

Our **Trustworthy AI framework** can be used to provide a strong foundation for delivering trusted, best-in-class capabilities in collaboration with Salesforce.

With flexible services that span a range of disciplines and industries, we can help you leverage agentic AI across your platforms and unlock value for your business. As part of that, for companies seeking full support, Deloitte Digital also offers AI-driven **managed services** to run an organization's enterprise technology end to end.



Service leaders are under pressure to deliver faster, more personalized support while improving efficiency at scale. With Agentforce Service, organizations can bring together AI agents, voice, digital channels, and CRM context in one environment helping teams move from reactive support to more proactive, connected service experiences. To realize that value at enterprise scale, customers often benefit from working with partners like Deloitte Digital that can help prioritize the right use cases, establish strong data and governance foundations, and guide implementation and change across the service organization."

Kishan Chetan, EVP and GM,
Agentforce Service

Client spotlight: Transforming Salesforce's own employee experience with Agentforce

THE CHALLENGE

Salesforce employees were spending too much time on low-value tasks and struggled to find information quickly and effectively, leading to decreased productivity. Deloitte Digital and Salesforce believed that the just-developed Agentforce could help reimagine how work gets done. By being the first to adopt its own technology, Salesforce could also gain a firsthand view of product performance, making it easier to refine the experience for future implementations.

THE DELOITTE DIGITAL + SALESFORCE SOLUTION

After prioritizing use cases and establishing appropriate guardrails, we deployed Agentforce Service for Salesforce's Employee Success team and their HR-case management. Salesforce's agentic AI technology reduced case resolution time, increased data quality, and allowed employees to focus on more strategic, complex tasks. After a successful implementation with impactful results, Salesforce was well positioned to introduce agentic AI to the broader market.

Salesforce data reveals that with Agentforce, businesses can deploy AI agents 16x faster and with 75% greater accuracy. It's a transformation that Salesforce experienced firsthand—and, in collaboration with Deloitte Digital, can now deliver to the broader market.



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