

salesforce

Marketing Use Cases in the Age of AI and Agentforce

WORKBOOK



✉ Emails

Fall Boots Email



Segment Preview

🔗 Fall Boots Segment

🔄 397,992

Segment Description



Agent Scoring

99

Lead Score



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Introduction

Opportunities with AI and Agentforce

AI has changed marketing forever. In the first waves of predictive and generative AI, we discovered that how marketers interacted with their customers and personalized experiences would never be the same. And now, we're in a new wave of AI – where agents will be able to take actions for you.

Marketers can now use agents to build end-to-end campaigns and take advantage of deeper insights. Teams can automate more tasks, increasing efficiency and performance. And customers can get the personalized, 1-to-1 experiences they've always wanted, across every touchpoint. But true success with agents means integrating data, AI, and automation to autonomously execute tasks. This collaborative approach ensures a seamless transition for complex, high-value work. This workbook will guide you through several of Salesforce's marketing AI and Agentforce use cases. We'll focus on segmentation, automation, personalization, and insights. These four pillars will revolutionize how you build relationships with customers and improve results.

You'll learn how Salesforce can help you build a foundation for AI and agents and develop strategies to use these tools. We designed this workbook to help you do all of this and more.



Introduction

Opportunities with AI and Agentforce

What is Agentforce?

Agentforce is a complete AI system that integrates data, AI, automation, and humans to deploy trusted AI agents for effective business outcomes. It works by giving teams tools, services, and agents that can tap into the power of a large language model (LLM) and their connected business data to autonomously identify, plan, and execute work.

Agentforce allows teams to create and customize agents, as well as use a library of ready-to-use skills for any use case across sales, service, marketing and commerce, and more.

Imagine agents handling routine inquiries, building and optimizing marketing campaigns, and autonomously personalizing every customer engagement. All these tasks are based on defined business goals and brand guidelines set by the marketer and actioned on by agents. When assigned a task, the agent can:

1. Search for data relevant to the job or request.
2. Analyze that data and come up with an action plan for the job.
3. Execute the action plan to do the job.
4. Continuously learn from each interaction, refining their algorithms to improve accuracy and effectiveness.

This action-oriented approach requires a strong data foundation. AI thrives on good data, so data silos greatly hinder its efficiency. A unified data foundation allows your agents to have access to real-time, structured, and unstructured data. This ensures they make informed, relevant, and accurate decisions.



The Five Attributes of an Agent

- **Role:** An agent's purpose
- **Trusted data:** The data an agent needs to be successful
- **Actions:** The goals an agent can fulfill
- **Guardrails:** The guidelines an agent can operate under
- **Channels:** The applications where an agent gets work done



01

AI-Powered Segmentation

Audience segmentation is the key to precision in marketing. Using Agentforce, you can create precise segments in minutes and define your target audience with ease and accuracy. By chatting with agents using natural language prompts, simply describe your ideal target audience. The agent will ground that prompt in data from Data Cloud and translate these attributes into the appropriate segment attributes. You won't need to sift through data models or rely on IT teams. Just quickly create and refine your segments to start delivering more targeted and effective campaigns.



Key Insights

An AI model is only as good as what it's taught. While using large language models (LLM) to prompt specific actions can be useful, their effectiveness hinges on the quality of the prompts they receive. Generic prompts yield generic results.

Marketers need to provide their models with access to relevant and up-to-date data. This is where retrieval-augmented generation (RAG) comes in. By integrating RAG into your AI infrastructure, you can help your models access and use your proprietary data, including structured and unstructured data.

The Salesforce Platform has safety guardrails called the Trust Layer. Your prompts are grounded and enriched with your unified data through the power of Data Cloud. The output of a prompt depends on permissioned access to relevant data, and we make that possible through secure data retrieval.

A Marketer's Inner Dialogue

- How can I slice my audience data better?
- How can I improve my audience-targeting ability?
- How can I better prioritize my audiences?
- What is the right distribution of resources across these audiences?
- Which audiences might I be missing or overlooking?

KPIs

Top-of-funnel metrics:

- | | |
|-------------------------------------|-------------------------------|
| 01. Impressions | 05. Return on ad spend (ROAS) |
| 02. Open rate | 06. Segment growth |
| 03. Cost to acquire customers (CAC) | 07. Segment engagement |
| 04. Customer lifetime value (LTV) | |

01 AI-Powered Segmentation Solve with Marketing AI

01 Marketing Cloud Engagement and Marketing Cloud Growth and Advanced Editions: Einstein Engagement Scoring

Predict your contact's likelihood to engage with emails and push notifications via unified data and machine learning.

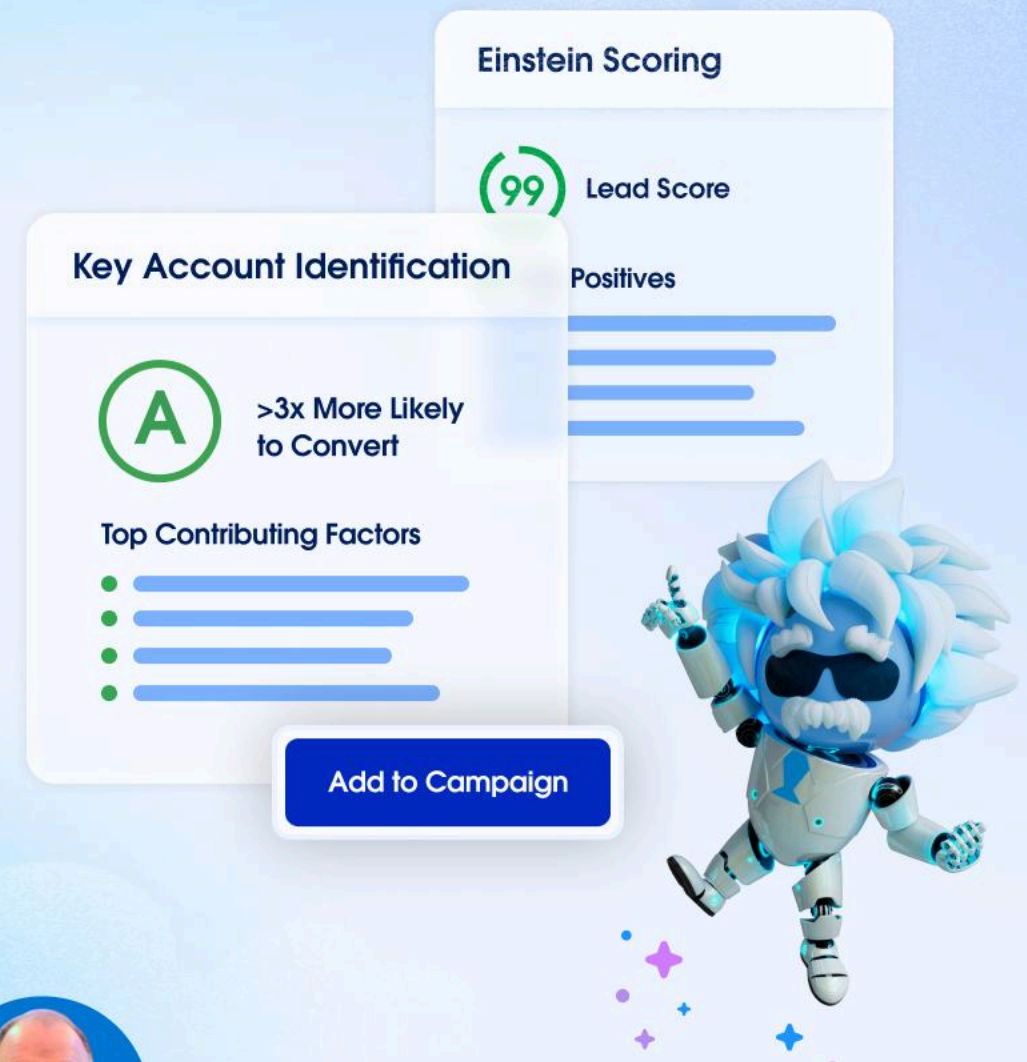
You can also:

- Monitor subscriber list health via a dashboard
- Build audiences from top-performing subscriber attributes
- Segment lists to target specific campaign engagement
- View influencing factors of engagement through graphs
- Integrate with Marketing Cloud tools like Email Studio, Journey Builder, Salesforce Flow, and more
- Discover shifts in subscriber personas using analytics to determine upward or downward momentum

02 Marketing Cloud Account Engagement: Einstein Key Account Identification

Determine top prospects for account-based marketing (ABM) from past opportunity creation data. This approach generates a scoring model, ranking each account by tiers. Target the highest-tier prospects in engagement programs, automation rules, and dynamic lists.

Insights from account attributes and engagement metrics are available to help refine your strategy.



David Slenzak

Co-Founder & Managing Partner, Broadtree

"I was able to use the AI segmentation agent on day one post-implementation. I'm capable of self-implementing and also can implement a two-year roadmap of a pretty sophisticated vision for our data."

01

AI-Powered Segmentation

Worksheet: Put Your Knowledge into Practice

CAMPAIGN PLANNING PHASE		
Determine the goal of this campaign.	Define your total addressable market.	List some characteristics that align with this goal.
Example Create awareness of a new line of hiking boots and drive purchase.	Total customers last quarter = 200,000 Aiming for 10% growth rate TAM = 220,000	Loyal, repeat customers Seasonal purchasers (fall, spring)

01

AI-Powered Segmentation

Worksheet: Put Your Knowledge into Practice

SEGMENT BUILDING PHASE		
Name of audience and audience criteria.	Available data source and data points.	List some characteristics that align with this goal.
Example Hiking enthusiasts who are active outdoors.	1. Past purchase of hiking boots 2. Hiking boots in an abandoned cart 3. Searched hiking boots on web and/or interacted with personalized ad for hiking boots	1. Time frame > 1 year 2. Time frame < 3 months 3. Time frame < 1 month

AI-Powered Automation

AI-powered automation is a set of coordinated intelligent actions. Agentforce has transformed automation by autonomously carrying out complex processes and workflows.

AI helps organizations achieve remarkable feats of coordination and productivity while saving them time. Agents make automation even more efficient with the marketer describing the strategy and the agent executing on it.



Key Insights

The main challenge in automating a customer journey is maintaining consistency across different online and offline touchpoints. Customers expect a seamless experience, regardless of how and where they interact with a brand. This entails integrating data from multiple sources, delivering personalized content, optimizing timing and relevance, and measuring the impact of each touchpoint. Marketers rely on marketing automation and AI-enhanced customer journey orchestration tools to handle these intricacies. Their goal is to create a unified, personalized, and data-driven experience.

A Marketer's Inner Dialogue

- How can I be sure not to oversaturate/overwhelm my audience?
- How can I scale my journey strategy?
- How do I boost visibility with a single send?
- How can I maximize ROI for each send?
- How can I achieve more with fewer resources?

KPIs

To assess the health of your marketing campaigns and customer relationships, consider these mid-funnel metrics:

- | | |
|-----------------------------------|-------------------------|
| 01. Unsubscribe rate | 05. CSAT |
| 02. CTRs | 06. Abandonment rate |
| 03. CTA performance | 07. Channel performance |
| 04. Average saturation by contact | |

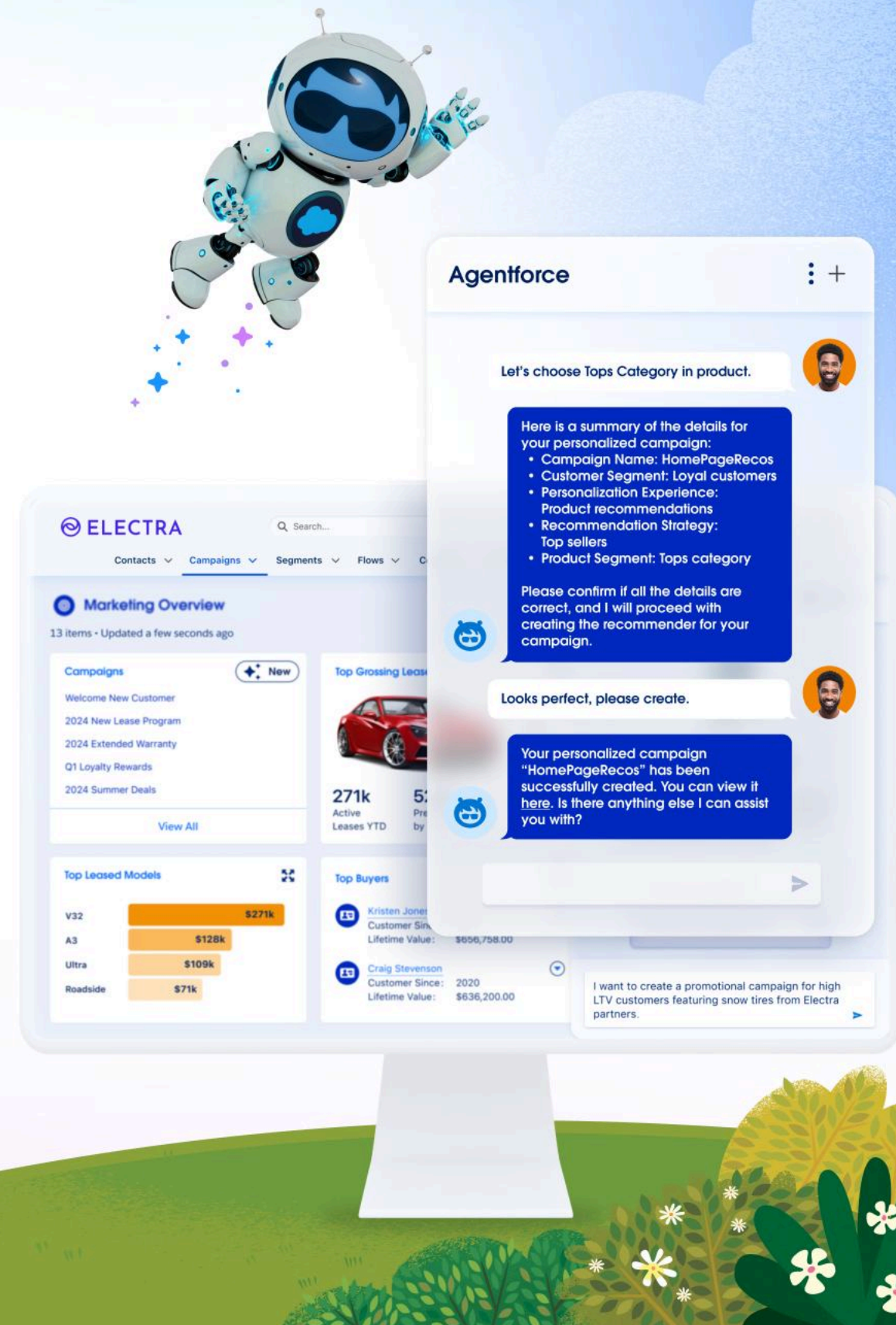
02 AI-Powered Automation Solve with Agentforce

Marketing Cloud Growth and Advanced Editions: Agentforce Campaign Creation

Agentforce helps marketers save time and get to market faster with a trusted agent assisting with end-to-end campaigns. Using AI prompts, marketers can generate campaign briefs, personalized content, and customer journeys based on user-defined goals and guidelines. Here's how:

- 1. Brief Creation:** By using natural language prompts to describe campaign goals, the agent will ground that prompt in data from Data Cloud, as well as the company brand guidelines, to create a complete campaign brief. This can include campaign strategy, key messages, segment attributes, and customer journeys.
- 2. Campaign Generation:** The agent will then use this brief to autonomously create the target audience segment, generate the first draft of email subject lines, body copy, SMS messages, and even build a customer journey in Salesforce Flow.
- 3. Performance Optimization:** Post-launch, Agentforce summarizes performance so marketers can quickly take action to optimize campaign KPIs.

Note: Agentforce Campaign Creation is also available to Marketing Cloud Account Engagement customers. Learn more [here](#).



02 AI-Powered Automation Solve with Marketing AI

01 Marketing Cloud Engagement, Marketing Cloud Account Engagement, and Marketing Cloud Growth and Advanced Editions: Send Time Optimization

Take the guesswork out of email timing, ensuring your messages land at the perfect moment. Using predictive AI, you can personalize send times based on each customer's past engagement – maximizing opens and keeping your emails at the top of the inbox. Accessible within Salesforce Flow, this feature helps you boost engagement by delivering emails on the customer's terms.

02 Personalization: Triggered Campaigns and Journey Remapping

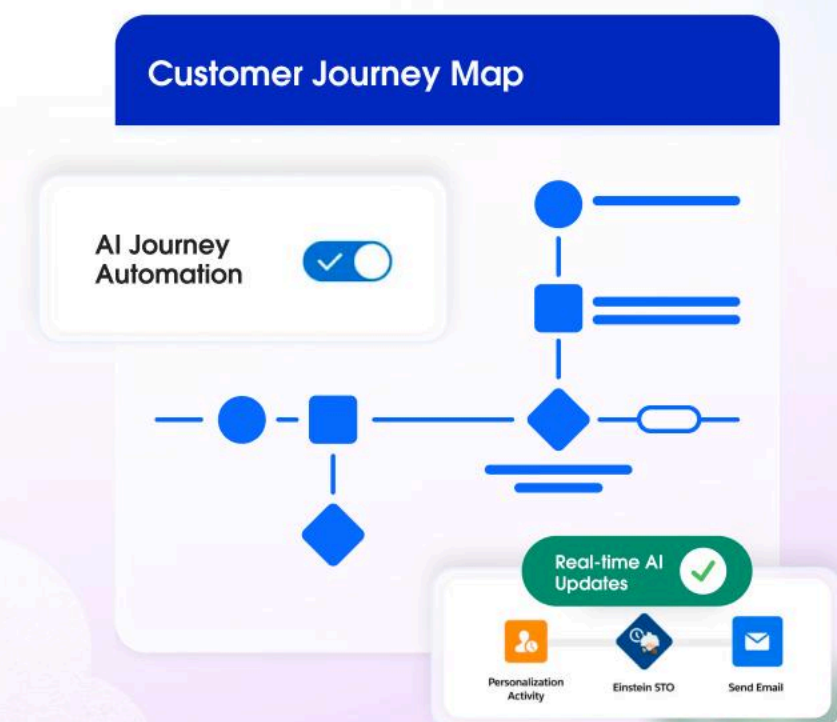
Initiate actions in Marketing Cloud Personalization (MCP) based on specific events, like user behaviors or environmental changes. Use triggered campaigns for segmented targeting, A/B testing, or setting campaign schedules. Examples include:

- Promotions to shoppers who viewed but didn't purchase a product
- Prompting new users to finish onboarding
- Encouraging urgency for on-sale products
- Notifying customers when favorite items are restocked

Remap journeys in Journey Builder, synchronized with MCP, to adjust actions for subscribers based on their website activity.

03 Marketing Cloud Engagement and Marketing Cloud Growth and Advanced Editions: Einstein Engagement Frequency

Assess your contacts and subscribers to find the right email balance, ensuring you communicate effectively without overwhelming them. View insights on email sends and engagement, receive AI-driven suggestions on optimal send ranges, and adjust your cadence accordingly. By identifying over-messaged and under-messaged subscribers, you can tailor outreach to maximize engagement and minimize unsubscribes. Integrate these insights directly into Salesforce Flow to guide customers down personalized paths.



Worksheet: Put Your Knowledge into Practice

Example

02

AI-Powered Automation

Worksheet: Put Your Knowledge into Practice

JOURNEY BUILDING PHASE			
Which channels will be most effective, knowing your audience, desired outcome, and available data sources (section 1 example)?		Map channels with existing content and any new messages required.	Determine how many steps and splits you'll require (using best practices outlines in the Journey Builder UI) and build your journey.
• Email • Personalized ads on social • Personalized ads on web • Hiking content: blog		• Reuse configured email templates with product recommendation, swapping copy for imagery • Update hiking blog to refresh SEO • Create new social ads for Instagram, Meta, and website	(In Journey Builder, begin to build out this journey.)



Worksheet: Put Your Knowledge into Practice

TESTING AND LEARNING WITH AI PHASE		
AI-lever selected.	Initial hypothesis.	Learning from initial test and next steps.
Example Marketing Cloud Engagement: Einstein Engagement Scoring	Use Engagement Scoring to measure the health of campaign audience to ensure the best actions are being taken. Initial hypothesis is that this journey is optimal for this segment.	Learning: Loyal customers have higher open rates. Next steps: Consider building an engagement split in this journey to maximize subscribers who are engaged.



03

AI-Powered Personalization

AI-powered personalization makes it easier to build lasting customer relationships that increase lifetime value. Today's customers want experiences that align with their specific needs. You can deliver hyper-personalized product recommendations, dynamic content customization, and seamless experiences at scale with the combination of predictive AI and agents. If you aim to lead in your market, AI-powered personalization isn't optional. It's essential.



Key Insights

Deploying AI-powered personalization comes with challenges, mainly because of the complexity and resources needed to integrate and optimize these systems:

Data Quality and Availability: AI's success leans heavily on data. However, many organizations struggle with data quality, such as incomplete or inaccurate information, complicating the creation of effective AI models.

Talent Gap: A notable shortage of professionals equipped to handle AI systems exists, and competition for these experts can be fierce. The good news is that agents are making AI accessible to anyone, regardless of technical expertise.

These challenges can also be viewed as opportunities. Consider using unified customer profiles to have a single source of truth – greatly increasing the quality and availability of your data. To proactively address the talent gap, skill up on AI tools and agents while encouraging your team to do the same. This will equip you and your team with the knowledge and skills to maximize Agentforce's impact.

A Marketer's Inner Dialogue

- How can I trust AI output if I can't trust my data?
- How can I deploy personalization at scale?
- Where does personalization have the most impact?
- Where do I start with personalization if every moment, in theory, should be personalized?

KPIs

Adopt these lower-funnel tactics to aid conversion:

- | | |
|-----------------------------|----------|
| 01. Conversation rate | 05. LTV |
| 02. Total order value (TOV) | 06. CSAT |
| 03. Cart abandonment rate | |
| 04. Personalization lift | |

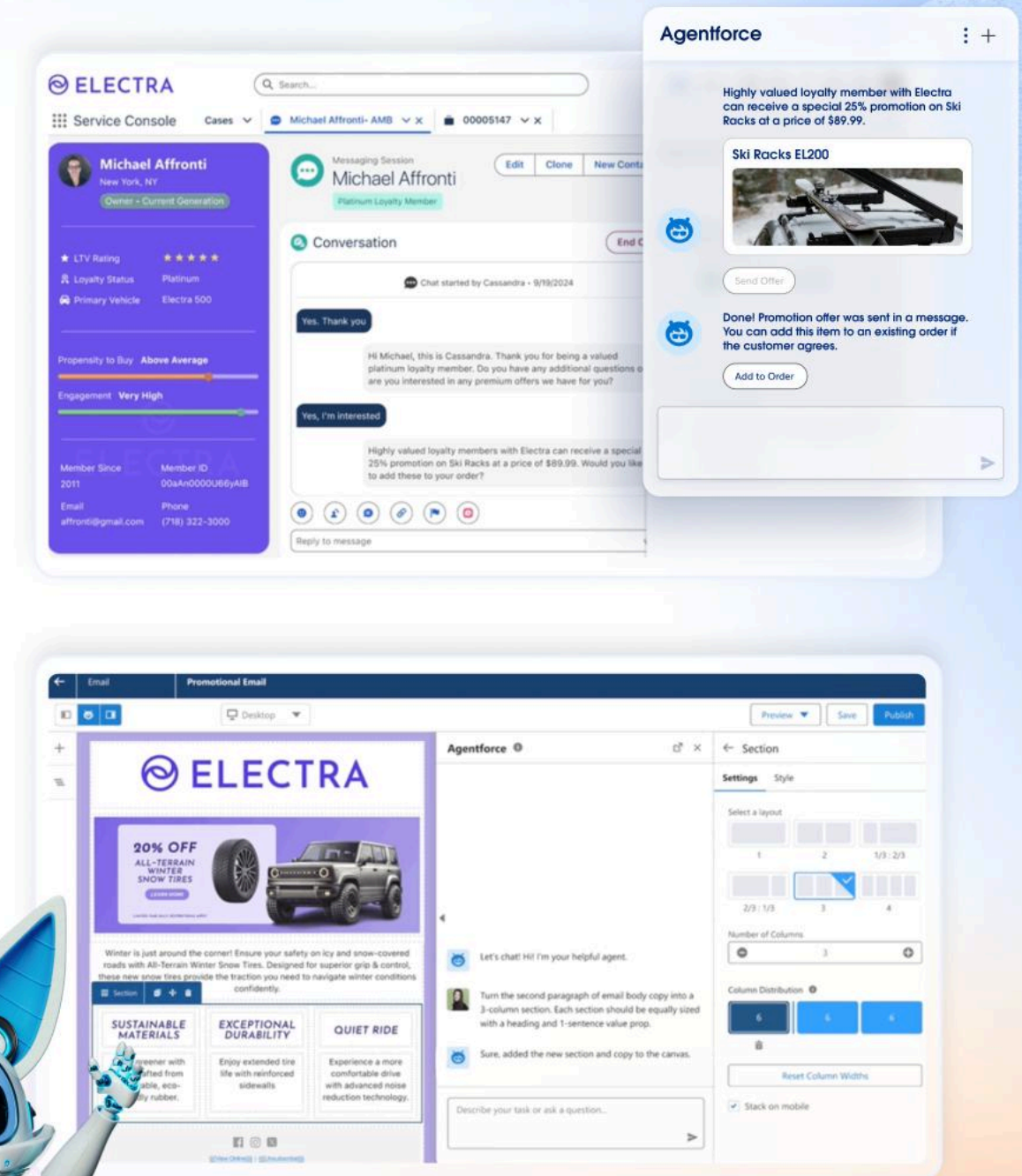
03 AI-Powered Personalization Solve with Agentforce

Personalization: Agentforce Decisioning and Configuration

Agentforce assists with the setup and activation of autonomous personalization at every touchpoint across the entire customer lifecycle – at scale and in real time.

With automated decisioning for 1-to-1 content selection and activation, marketers can scale 1-to-1 personalization in a way that wasn't possible before. Using the Agentforce ready-to-use personalization skills will set up actions and automatically update touchpoints across channels and recommend the right content, products, and offers for each customer based on their profile.

This helps marketers save time and improve efficiency with an agent that understands a website and does the required implementation to personalize across all marketing channels.



03 AI-Powered Personalization Solve with Marketing AI

01 Marketing Cloud Engagement and Marketing Cloud Growth and Advanced Editions: Content Creation

Boost marketer productivity by kickstarting the email drafting process. Select Einstein Content Creation and describe what you need in natural language. The AI will generate a draft based on your specified audience, tone, and offer. Upvote or downvote generated content, make edits, and train the model over time.

Marketing Cloud Growth and Advanced Editions: Content Creation for SMS

Reach customers quickly through the popular SMS channel by accelerating the drafting process. With Einstein, generate multiple SMS message iterations and select the best fit.

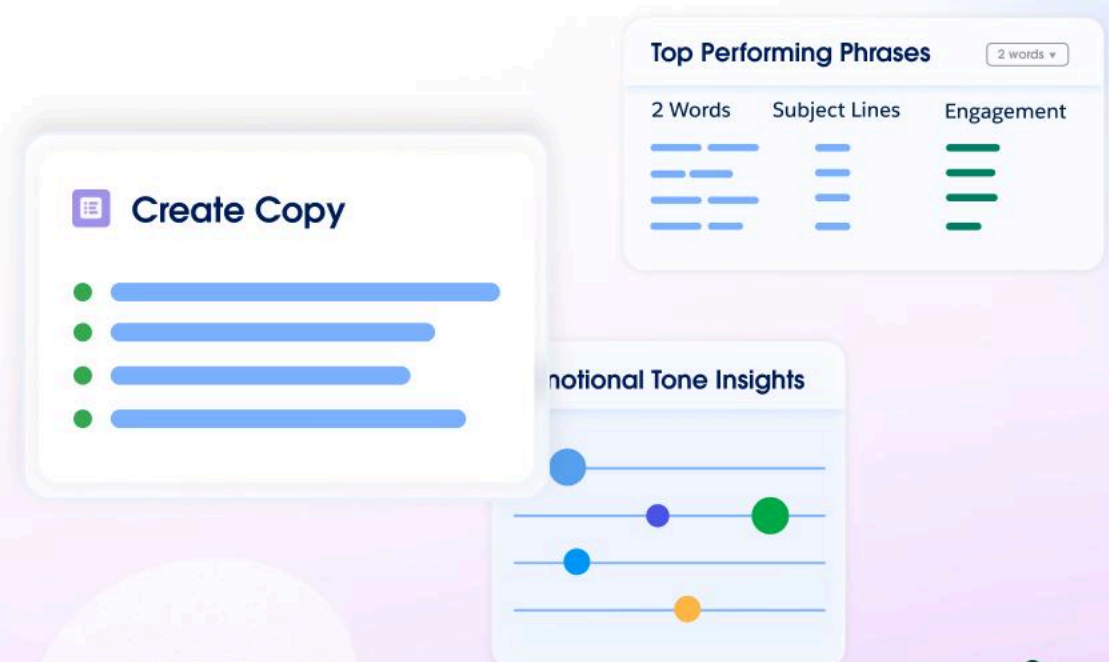
02 Marketing Cloud Engagement: Einstein Content Selection

Personalize content in real time using a no-code tool. Einstein selects the best content, constantly evaluating winners and testing to maximize click-through rates.

03 Marketing Cloud Personalization: Einstein Recommendations

Enhance Marketing Cloud Personalization (MCP) to ensure each contact gets tailored product, content, or offer suggestions via email and web. Every click, download, view, or purchase reveals valuable insights into customer preferences.

MCP combines user behavior with algorithms and your unique business rules to craft a user profile of affinities. Use this profile to determine the most relevant content and products for each customer in real time.



03

AI-Powered Personalization

Worksheet: Put Your Knowledge into Practice

CONTENT PLANNING PHASE		
Rewrite the goal of this campaign (from section 1), including name of audience.	What are you asking customers to do?	What conversions are you looking to see through this campaign?
Example Create awareness of a new line of hiking boots and drive purchase. - Hiking enthusiasts - Email, social, web	Purchase a new pair of hiking boots.	Open rates CTRs Revenue



03

AI-Powered Personalization

Worksheet: Put Your Knowledge into Practice

CONTENT CREATION PHASE		
List every journey step and channel (from section 2).	What is the content/purpose of this message?	What conversions are you looking to see through this campaign?
Example (Or reference Journey Builder canvas.) Email #1	Goal: Introduce the campaign for hiking boots. Primary message: Hiking blog showcasing the best seasonal trails. Secondary message: 10% off hiking boots offer.	Personalized recommendation in the email. Localized blog based on customer's geo-location (blog has east coast/west coast version based on popular buying regions).

03

AI-Powered Personalization

Worksheet: Put Your Knowledge into Practice

TESTING AND LEARNING WITH AI PHASE		
AI-lever selected.	Initial hypothesis.	Learning from initial test and next step.
Content Creation	Use Content Creation to generate the body copy and subject lines for all emails in this campaign. Hypothesis: This will save time in launching the campaign.	Learning: Save time, but request testing versions. Next step: Build a A/B test for two different messages for email #1.

Example



04

AI-Powered Insights

Unleashing the true potential of your data requires AI-powered insights. An optimization mindset, and Agentforce, makes querying your data that much easier. In today's data-rich and dynamic marketing environment, gaining actionable insights and making data-driven decisions fast keeps you competitive.

With AI-driven insights informing marketing optimization, predictive analytics can anticipate customer behaviors while real-time data insights inform strategic shifts, and agents can help you take action. They'll also help you take advantage of hidden opportunities and refine your strategies for maximum impact.



Key Insights

An optimization mindset focuses on consistently improving marketing campaigns and strategies. It requires actively analyzing data, testing varied tactics, and pivoting based on data-backed findings. Embracing this mindset can present challenges:

Comfort with the Status Quo: Sticking to established strategies and processes can make it challenging to embrace new optimization opportunities and drive change.

Resource Constraints: Optimization often requires more time, budget, and technology. When resources are limited or there's a shortage of data expertise, it can hinder efforts.

Short-Term Focus: Pressure to deliver immediate results can lead to a short-term focus, making it challenging to invest in longer-term optimization efforts that may not show instant returns.

Overcoming these challenges often demands a cultural shift, investment in training and tech, and a continuous commitment to learning.

A Marketer's Inner Dialogue

- How can I be sure not to oversaturate/overwhelm my audience?
- How can I scale my journey strategy?
- How do I boost visibility with a single send?
- How can I maximize ROI for each send?
- How can I achieve more with fewer resources?

KPIs

AI-driven insights can significantly enhance marketing results, varying by focus area. Typically, it's gauged by:

01. Rate of improvement (specific to KPI)
02. Quarter-on-quarter (QOQ) improvement (specific to KPI)
03. Year-over-year (YOY) improvement (specific to KPI)

04 AI-Powered Insights Solve with Marketing AI

01 Marketing Intelligence: Einstein Marketing Insights (EMI)

Discover key factors affecting your marketing performance by evaluating your data:

- Monitor KPIs with marketing intelligence that detail specific metrics
- For example, if you're assessing average site duration, a bot can pinpoint pathways that held users' attention long
- Replicate these insights to support your KPIs

02 Marketing Cloud Engagement: Einstein Copy Insights

Examine commercial email subject lines with text analytics and natural language processing. Use these insights to create subject lines that boost email interactions. Test potential engagement with the performance tester, comparing your subject line to previous ones. Assess one or compare up to 10.

Draft Subject Lines

Four draft subject lines are shown, each with a radio button and a thumbs up/down icon.

- ☒ [Subject Line 1]
- ☐ [Subject Line 2]
- ☐ [Subject Line 3]
- ☐ [Subject Line 4]

Engagement Scoring



Recent Sent Emails

Monthly Newsletter

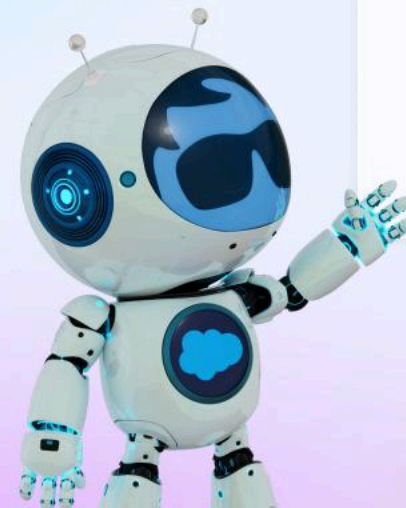
[Subject Line]

Birthday

[Subject Line]

Monthly Newsletter

[Subject Line]



04

AI-Powered Insights

Solve with Marketing AI

03

Marketing Cloud Account Engagement:
Einstein Lead Scoring

Gain insights based on lead fields and aid sales teams in prioritizing leads.

04

Marketing Cloud Engagement:
Einstein Messaging Insights

Keep an eye on changes in your marketing performance within Marketing Cloud. The Einstein notifications badge in the header gives updates on email sends and journey results. Get alerts for any anomalies straight from this badge. For deeper insights, turn to the insights hub.

Einstein tracks engagement metrics like opens, clicks, and unsubscribes for every email sent. When results stray notably from expectations, an insight is created to spotlight the discrepancy and offer context.

Einstein Messaging Insights



High Engagement of "Birthday"



High Click Rate for "Monthly..."



High Unsubscribe Rate for...



Low Unsubscribe Rate for...



Jake Radelet

Manager, CRM & Analytics, Texas Rangers

"By being able to measure our marketing activity, we've been a lot more effective and efficient in deciding where to spend our dollars when it comes to ad spend and how we reach out to our fans."

04

AI-Powered Insights

Worksheet: Put Your Knowledge into Practice

CAMPAIGN EVALUATION PHASE		
Rewrite the goal of this campaign (from section 1), including name of audience and channels selected.	Restate your target KPI range from section 2.	Provide actual results in this column.
Create awareness of a new line of hiking boots and drive purchase. - Hiking enthusiasts - Email, social, web	CTR: 2.3%–2.5% ROI: 35%–38% Revenue: \$9.5–\$9.9 million	CTR: 2.35% ROI: Tracking to 37% Revenue: Currently at 75% of goal



Worksheet: Put Your Knowledge into Practice

TESTING AND LEARNING WITH AI PHASE		
AI-lever selected.	Initial hypothesis.	Provide actual results in this column.
Example Einstein Copy Insights	The A/B test (from previous stage) will select a high performer.	Learning: Subject line B with a warmer tone yields more opens, per “Einstein Copy Insights”. Next step: Update subject lines to be warmer in tone.



05 Agentforce for Marketing Use Cases

Let's put our knowledge into practice with three Agentforce for Marketing use cases.

Automate personalized conversations in WhatsApp

Today, there are very limited chatbot experiences using keywords. Marketers often can't respond to a WhatsApp message at all. Here, an agent connects marketing, service, and commerce through WhatsApp by autonomously assisting customers with product recommendations, questions, purchases, and returns.

When a customer gets an offer, alert, or order confirmation in WhatsApp:

1. **I want the agent to take these actions:** autonomously assist customers with relevant product or service recommendations, order updates, scheduling, purchases, and returns. The agent should also escalate the conversation to a human service rep if they cannot assist or the customer requests it – all within the same WhatsApp thread.
2. **And not:** recommend something they have already purchased or ask for information available within Data Cloud.
3. **Using this data:** marketing engagement, CRM, commerce orders, knowledge articles, WhatsApp opt-in, and web browsing.
4. **Resulting in:** increased conversions, improved customer satisfaction score (CSAT) and customer lifetime value (CLTV), and reduced service rep volume.



05 Agentforce for Marketing Use Cases

Build custom agendas for every attendee

Self-guided experiences can result in more opportunities to abandon registration, or for registered attendees to not find the sessions most relevant to them. Here, the agent lives on the event website and autonomously recommends and schedules sessions to build personalized agendas for attendees. Let's see how.

When people visit an event website:

- 1. I want the agent to:** autonomously greet visitors and offer to assist them with finding the right event information and registering. Recommend and schedule sessions (or suggest alternative options) to build personalized agendas for attendees.
- 2. And not:** recommend a session they've already attended at previous events (with the exception of keynotes), or recommend sessions for products/topics where no affinity has been shown.
- 3. Using this data:** marketing engagement, CRM, previous event registration and attendance, event catalog and details, and web browsing.
- 4. Resulting in:** increased registered attendees, improved customer event satisfaction, and reduced bounce rate.

Automate lead capture on web

Self-guided experiences can result in more opportunities to bounce before talking to a sales rep or becoming a lead. Here, the agent captures contact info needed to make personalized recommendations for next steps. Here's how.

When people visit a website:

- 1. I want the agent to:** autonomously greet visitors and offer to assist them with product/service recommendations, and suggest relevant resources to learn more. This includes capturing the contact info needed to make recommendations more tailored, register them for a webinar, provide a gated asset, or schedule a follow-up appointment with a sales rep.
- 2. And not:** recommend products/services they already have, offer promotions they don't qualify for, or ask for contact info more than once.
- 3. Using this data:** marketing engagement, CRM, and web browsing.
- 4. Resulting in:** increased qualified leads, improved speed to lead and conversion, and reduced bounce rates.



05

Agentforce for Marketing Use Cases

Worksheet: Put Your Knowledge into Practice

USE CASE FRAMEWORK		
When (moment)	I want (action)	so that (goal)

KPIs

DATA SOURCES
What they did + who they are

AGENT(S)	
Actions: What to do	Guardrails: What not to do

CHANNELS
Internal + External



More AI Resources for Marketing Teams



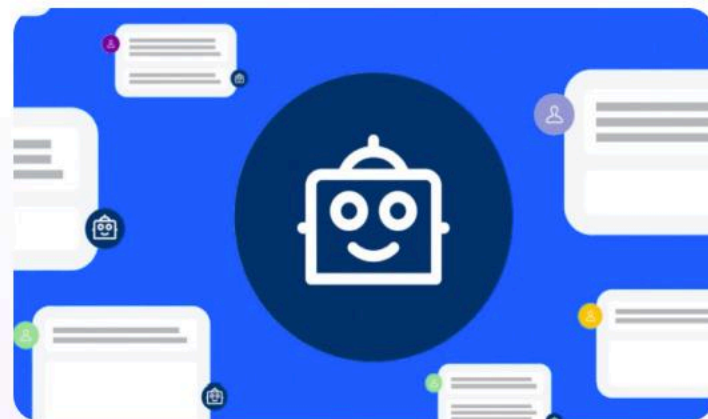
Discover Agentforce and our AI tools for marketing.

[Explore the product](#)



See the top trends in generative AI for marketers.

[Read the report](#)



Discover more about Agentforce and build your first agent with free learning on Trailhead.

[Start learning](#)



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