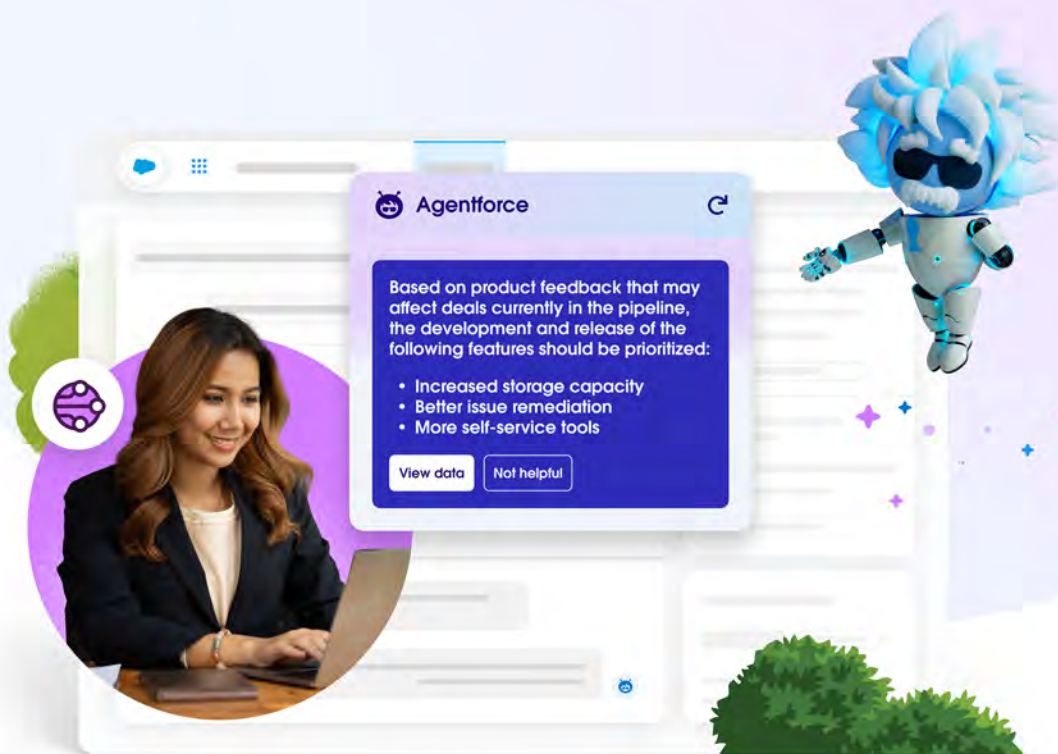


AI Agents: Unlocking growth and innovation in the tech industry

See how you can fuel the future with data-driven, agentic AI solutions



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Tech's new reality: Smarter growth, cost efficiency, and AI-powered innovation

Today's tech industry looks different than the tech industry of the past. High interest rates, decreased VC investments, and lower overall spending has put efficiency, engagement, and cost savings top of mind for industry leaders. Tech companies still have to serve their customers, but the move away from a growth-at-all-costs mindset means that they're also operating under higher scrutiny from investors and analysts on where that growth is coming from. Or, to put it another way, growth is still a key goal, but efficient growth – and customer retention – are paramount.

These circumstances have created a shift in priorities and a new mindset that's more cost-conscious and cautious. Unsurprisingly, AI, especially agentic AI, is a hot topic, and many tech industry leaders are excited about how it might be used to better both their products and their operations.

Thus far, there's been a lot of experimentation and some development, but the industry has yet to find its magic bullet. This may be in part due to the fact that [only about 50% of tech companies have a distinct strategy for leveraging predictive and generative AI](#). Without such a strategy, or a solid data foundation, it's hard for employees to effectively build AI into their workflows and their customer products, nevermind effectively finding ways to harness the opportunities inherent in agentic AI.



of tech companies have a distinct strategy for leveraging predictive and generative AI.

[The Data + AI Trends in the Tech Industry Report](#)

Unified data powers an AI-driven future

Data is the center of everything. However, having data isn't valuable if your teams can't access and act on it when they need to. Data stuck in data lakes forces teams to spend hours fishing for what they need and can only take you so far. In order for data to be truly usable, it needs to be fully integrated across your organization. When data is integrated, you can activate it. This gives teams a single source of truth they can use to automate business processes, increase productivity, and fuel business growth. Many tech organizations know this, and yet they still have a hard time actually doing it.

Your data operation serves as the foundation for your AI. Unlocking AI's full potential requires that you bring your systems, tools, and data together. [Salesforce's Data Cloud](#) can do this. And, thanks to our zero copy network, all that data can be integrated without having to move or copy it. This simplifies the overall process and allows you to start building your AI capabilities immediately.



of leaders feel that their organization should be getting more out of their data.

[The State of Data and Analytics Report](#)



The secret to unified data lies in your tech stack

Throughout its history, the industry has found various paths to growth. Some companies began as upstarts or disruptors and then gained funding – growing little by little. Others exploded onto the scene, and still others merged and changed before finally becoming what they are today. Though these paths may vary in specificity, there is a commonality found among the majority of tech company growth stories: They had to move fast, find creative ways to be scrappy, and build successful companies on unknown ground. We often hear about rapid growth fueled by the ability to move fast and adjust later. However, less spoken is the fact that this rapid growth and scrappy sensibility have left many in the industry trying to solve for the resulting siloed tools, disconnected capabilities, and disparate data.

There is now a recognition among tech leaders that continued growth requires that they drill down on speed and scale. For many, this means simplifying and optimizing their software applications. Reducing complexity, eliminating redundancy, and increasing efficiency enables better performance and scalable growth. Knowing this, many leaders are reassessing their tech stack and asking questions like:



How can we simplify our technology?



How can we standardize?



How can we enable self-service?



How can we leverage our data so that we can truly reap the benefits of AI?

What's the answer to all these questions?
Data integration and built-in AI capabilities.

Agentic AI — the new face of AI

AI is not new to the tech industry. Already leaders are using it to drive faster product innovation, accelerate revenue growth, and drive front-office efficiency. Sales teams have also seen strong results, with [83% experiencing revenue growth in the past year—compared to just 66% without AI](#).

The more recent introduction of agentic AI takes all this potential even further. Agentic AI, or AI agents, are an extension of the ongoing digital transformation and the next step after predictive and generative AI. These AI agents are proactive and autonomous. Once they've been provided with a specified role, necessary business knowledge, and appropriate guardrails, they can take action and provide specialized, always-on support to both employees and customers.

Whether prebuilt or custom, AI agents comprise a force of digital laborers that can assist or act autonomously on behalf of sales teams, product managers, service representatives, and more. This enables you to scale revenue and productivity without having to dramatically scale your teams. In short, agents allow you to do more with less. It's important to note that agents are not replacing employees – rather, they are augmenting your existing teams. In fact, when humans work with agents, employee capabilities and potential are amplified.

Agents enhance the great work your teams are doing by eliminating redundant tasks and allowing them to focus more of their efforts on activities that drive revenue. So much so that [nearly 50% of rank-and-file workers and over 50% of leaders trust AI to do some of their work and are already offloading tasks to AI](#).

This is far more powerful and impactful than a simple bot. Agentic AI platforms, like [Agentforce](#), have the ability to turn data and automation into practical outcomes. Agents can take meaningful actions across multiple systems, channels, and teams and enable you to complete work faster. For example, you could automate knowledge article creation by asking an agent to analyze the latest release notes; summarize key updates in natural, user-friendly language; and then organize them so they are easy to find. This would enable customers, partners, and service teams to access accurate information quickly.

A note on trust and data security

When we talk about AI, it's important to also take a step back and talk about data security. [The Einstein Trust Layer](#) provides you with security guardrails that enable you to ground these AI models safely, using data in your CRM, data cloud, and even outside sources. Controls like zero data retention, data masking, secure data retrieval, and dynamic grounding offer flexibility alongside security. Even further, this trust layer is built seamlessly into your existing tools to help your teams work smarter and more productively whenever and wherever they need to – without taking on extra risk.



Let Agentforce streamline front-office operations while you focus on product innovation

A lot of tech companies are already experimenting with and building their own AI. Usually this development is happening in the realm of their products, but some are focusing on front office operations as well.

When it comes to technology companies' success, front office operations are not going to be the differentiator. Powering meaningful growth requires that you become increasingly competitive in the realm of your product.

“ True differentiation lies in product innovation. You'll get much better value for time and money spent focusing on your niche because that's something only you can do. Enterprise solutions will never get down to that level; in fact, enterprise solutions may very well lean toward commoditization, making an investment in custom solutions unwise.”

DREW DAVIDSON

TECHNOLOGY BUSINESS ADVISOR, SALESFORCE



Investing in out-of-the-box front office solutions will enable you to reduce costs, find the efficiencies you need, and save time and money. You can then reinvest those savings into product development and innovation, which will ultimately be the thing that powers your growth and fuels your company identity.

[For tech companies in particular](#), this could prove incredibly valuable. [Seventy-five percent of AI's value lies in the front office](#). This makes an investment in AI-powered solutions across your sales, marketing, and customer experience operations a strategic and efficient way to drive sustainable growth.

Transform sales with agents

When it comes to sales, it's all about growing the most amount of revenue, quickly and cost effectively. [Agentforce for Sales](#) pairs AI with CRM data to create a limitless, 24/7 sales team. Agents amplify seller capabilities and create a more powerful digital workforce. The end result is that sellers can use their time more efficiently, uplevel their skills, and close more deals in less time.

Prioritize, nurture, and accelerate deals

The ability for sellers to prioritize accounts using things like engagement scores and propensity to buy, while also taking product fit and intent into account, allows them to focus on the most valuable leads first. They can then [use agents to nurture leads](#) further down the value chain. These agents can prospect accounts that may not be ready to buy, field inbound leads for companies that may get high volumes, or work low-AOV accounts. This way, sellers can stay hyperfocused on the opportunities that will grow revenue now, without letting any possible opportunity fall by the wayside. For example, a seller focused on meeting with clients might task an agent with gathering information, drafting and sending the initial personalized emails, and answering any incoming product questions. Once the customer is ready to move forward, the agent can then schedule a call with the seller, thereby passing off the lead. This saves the seller time. And, because the agent was able to use unified data to provide precise product recommendations, it also increases the potential to accelerate the deal cycle.

Sell smarter and keep pace with innovation with real-time support

Ultimately, your overarching goal is for every seller to be the best they can be and close as many deals as possible. That said, technology sales can be tricky. Products are continuously innovating, changing, or updating, which necessitates that sellers continually update their product knowledge, messaging, and talking points. [This is where sales coaching can help](#). Whether it be onboarding new salespeople, training sellers on new products, or providing real-time call coaching, a sales coach can make sure your sellers are ready to bring new innovations to the field.

A sales coach can provide actionable insights that help sellers handle objections, refine pitches, and negotiate effectively. This can be used as part of training workflows for veteran sellers who might have to pass a test pitch before they are cleared to sell a new product or for new or more junior sellers who might need help accelerating their first sales or onboarding into a new role. They can also help during sales calls, providing real-time coaching that allows sellers to sell better and smarter with in-the-moment, personalized suggestions around pricing, products, and answers to questions about the competition. This streamlines deals and does away with the need for follow-up calls, making it a highly valuable tool when it comes to addressing product changes, innovation, and specified messaging for sellers selling into regulated industries.



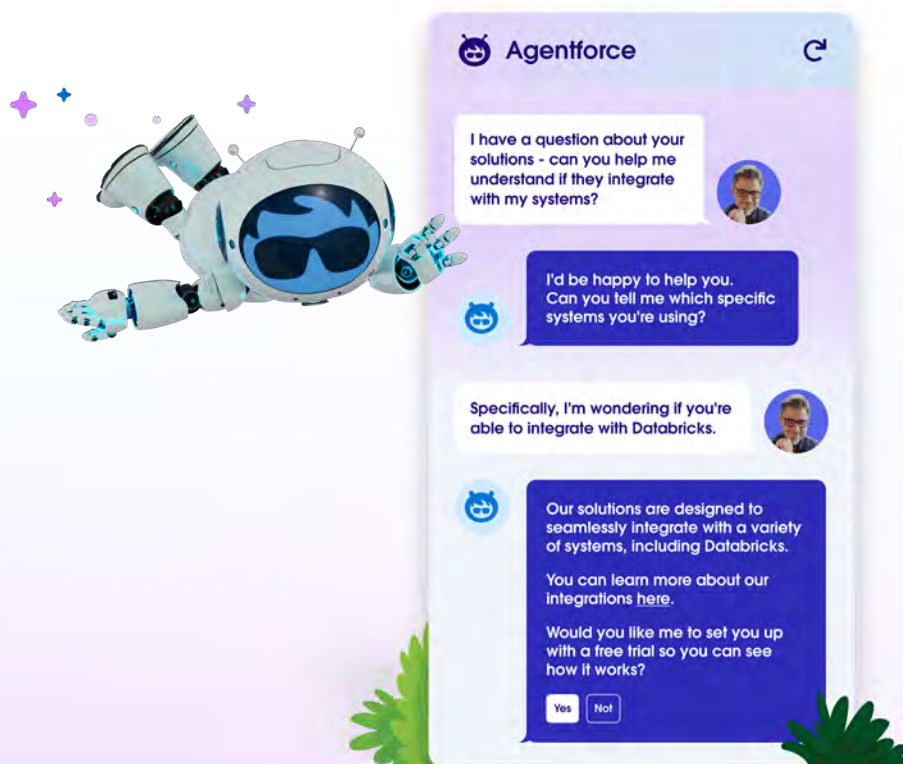
Drive sustainable growth and deliver better service with autonomous AI agents

Service centers have already benefited from the increased productivity and reduced costs that come as a result of AI. However, the introduction of autonomous AI agents can supercharge these gains – enhancing customer experiences and driving higher net revenue retention (NRR).

Autonomous AI agents can be used to engage customers around the clock and across channels in natural language. This means customers feel like they're talking to a human, allowing service representatives to work together with agents to resolve cases in a way that benefits everyone. You can task agents with taking on simple cases, and then, when necessary, seamlessly hand them off to human employees. And, because [Agentforce for Service](#) is using clearly defined security guardrails and trusted data, you can be sure that any answers provided by that AI agent will be quick and accurate.

This has benefits that extend beyond typical call center activities. For example, a customer opens a chat with an AI agent to ask a product question. Accessing your product knowledge base, the agent is able to answer the customer's inquiries. This has the potential to [deflect up to 50% of your cases](#). And, even for cases that aren't deflected, the agent's assistance can help human service representatives provide faster responses to complex product questions, troubleshooting, and more.

When humans work with agents, they can not only boost productivity and service capabilities, they can drive meaningful growth. For example, you can configure instructions that tell agents to suggest free trials or seize on upsell opportunities based on the types of products a customer has questions about. This turns everyday service inquiries into revenue-generating events that increase product adoption and drive future growth.



Build better marketing campaigns

It can be challenging for marketers in the tech space to build revenue-generating campaigns efficiently. So much so that [38% of tech marketers need technical assistance to build segments and execute campaigns](#). This need to wait for someone else to deploy their campaigns makes it impossible to act proactively. This is especially true when trying to create more personalized campaigns that require knowledge of specific customer profiles. Unified data and AI can be incredibly valuable in helping marketers with this type of messaging, segmentation, and content creation.

Your marketing teams can use a prompt to generate an audience and a message, enabling them to effectively drive engagement and revenue. For example, let's say you want to increase product usage in order to upsell customers. You can set your campaign goals and then an agent can use that information, along with product telemetry data brought in through Data Cloud, to [build a campaign brief](#). It will even draft the first email and create a journey with a seamless handoff to sales on your behalf, saving marketers time. Even further, with product telemetry data at your fingertips, you can personalize every step of the journey based on the products and features your customers may or may not have adopted.

A huge benefit of Agentforce is that it's working 24/7. As customers interact, Agentforce monitors performance against KPIs and takes action to optimize that performance. Your teams can then access and use that performance data throughout the campaign to refine both marketing and sales opportunities.

38%

**of tech marketers need technical assistance
to build segments and execute campaigns**

[The Ninth Edition State of Marketing Report](#)



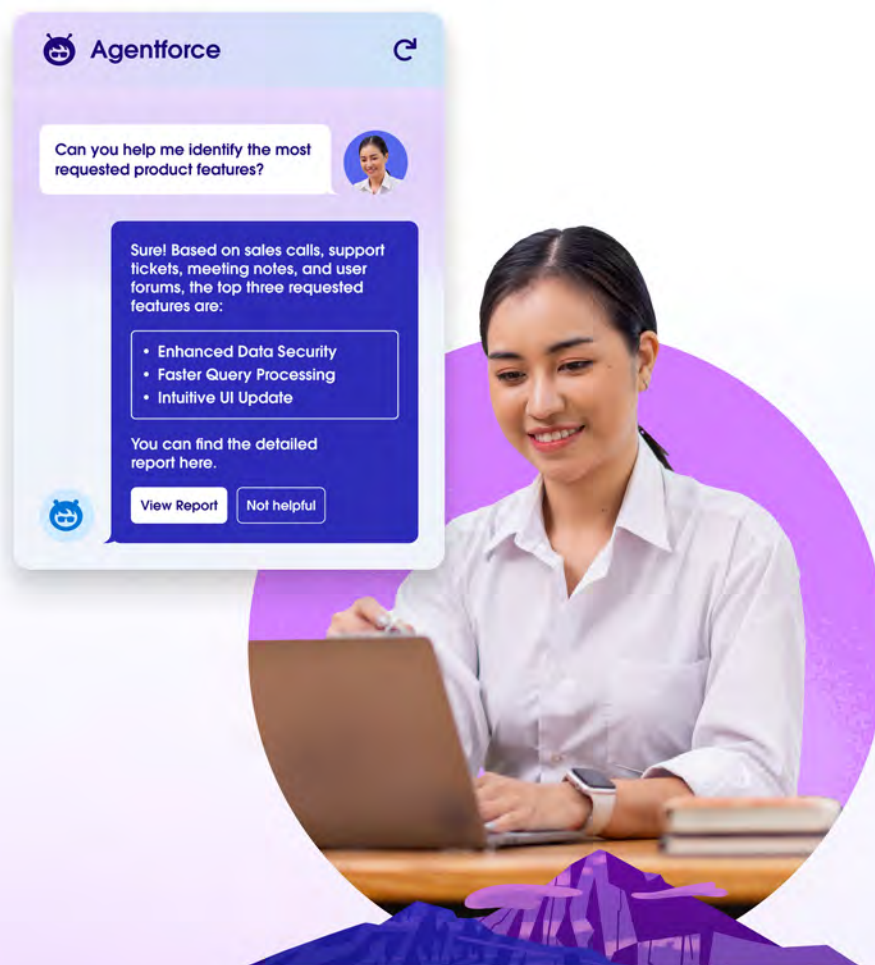
Streamline knowledge article creation and product innovation

Agentforce's ability to aggregate information across systems makes it especially valuable for technology companies continually innovating within their own product ecosystem.

This might be as simple as streamlining product documentation. For example, product teams might ask an agent to ingest unstructured data and then use it to create new knowledge base articles rooted on the most up-to-date product information that can be used by internal teams or customers to instantaneously answer internal or external product-related questions.

Perhaps more interesting is how Agentforce can help teams drive success by providing insights and information that boost productivity and fuel product innovation. For example, product teams typically spend a lot of time trying to gather product information, feedback, and requests. Usually, this involves sitting in on sales conversations, reading up on service cases, sifting through meeting notes, hosting customer advisory boards, consulting community boards, and more – which can be time-consuming.

Rather than do this manually, [teams could task an agent](#) with combing through this type of structured and unstructured data to paint a picture of the most requested features. That agent could then package the information in an easy-to-understand manner, making it easy for product teams to prioritize these features in their future roadmaps. This ability to hand work off to an agent streamlines a once onerous process, saving hours, if not days, of a product team's time.

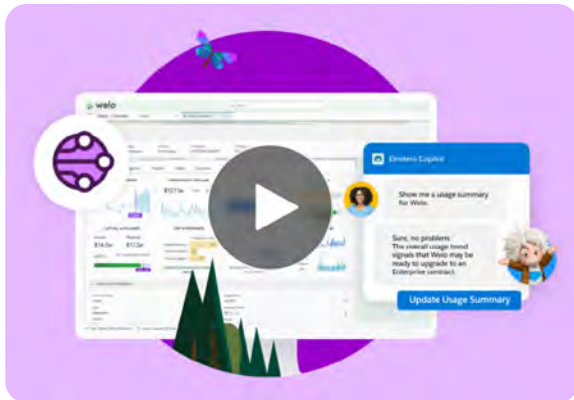


An investment in AI is an investment in the future

The tech market is getting increasingly competitive. This makes differentiation, efficiency, and cost-effective growth critical. Agentic AI is the key to all these things and more. However, the key to success doesn't lie in simply having AI, it lies in how you use it.

Partnering with Salesforce ensures that your AI investment is strategic and beneficial across all teams and departments. It allows you to benefit from the most up-to-date, cutting-edge front office AI solutions without having to get bogged down in operational systems and processes. [Agentforce](#) allows you to integrate AI agents across your systems and puts you on the fast track to efficient growth and cost-effective operations. In short, it streamlines front office processes so you can focus on what you do best: innovating, creating, and delivering for your customers.

Ready to learn more?



Discover Agentforce for tech.

See how you can accelerate cost-effective growth with integrated data, automation, and agentic AI across every area of your business.

LEARN MORE



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