



AI-Powered B2B Customer Engagement & Conversational Commerce

Transforming Enterprise Customer Engagement Through a
Salesforce Agentic AI Ecosystem

Powered by : Data Cloud + Marketing Cloud + Agentforce + Service Cloud + Digital Engagement + WhatsApp Business



WhatsApp-First
Conversational Engagement



Customer 360
Unified CRM, ERP & Interaction Data



End-to-End
Lead to Quote to Order AI



Seamless
AI-to-Human Handover

THE CHALLENGE

- **High volume** of customer inquiries across digital channels
- **Manual handling** of product, pricing, and service requests
- **Fragmented** ERP, CRM, and customer interaction data
- **Limited context** during conversations and follow-ups

THE AI SOLUTION

- **Data Cloud** unifies customer & business data into Customer 360
- **Marketing Cloud + WhatsApp** deliver eventtriggered, personalized engagement
- **Agentforce** qualifies leads, gathers requirements & orchestrates pricing/quotes
- **Service Cloud + Digital Engagement** enable seamless AI-to-human handover

KEY DIFFERENTIATORS

- **Agentforce-centric** architecture as the AI orchestration layer
- **End-to-end** conversational commerce: lead to quote to order to service
- **Unified** customer intelligence across ERP & CRM systems
- **Personalized**, event-driven engagement at scale
- **Intelligent** human collaboration with full context
- Future-ready foundation for **additional AI agents**

WHAT THE AI DELIVERS

Operational Outcomes

- **Faster** response and resolution times
- **Automated** qualification & requirement gathering
- **Reduced** manual sales and support effort
- **Seamless** AI-to-human collaboration

Financial Outcomes

- **Improved** sales productivity
- **Increased automation** across customer workflows
- **Reduced** dependency on manual processes
- Better utilization of customer & enterprise data

Strategic Outcomes

- **Higher** customer engagement
- **Personalized** customer journeys at scale
- Improved overall customer experience
- Scalable foundation for **conversational commerce**

IDEAL FOR

B2B Marketplaces & Wholesale Trading

Manufacturing & Industrial Distribution

Steel, Metals & Building Materials

Industrial, Automotive & Chemicals

NEXT STEPS

- Step 1: Unify Customer Intelligence (Weeks 1-4)** - Review current SFCC build, customizations, integrations, and data flow.
- Step 2: Launch Agentforce on WhatsApp (Weeks 5-8)** - Define the unified API contract and prioritize the modernization roadmap.
- Step 3: Scale Conversational Commerce** - Extend to order tracking, logistics & seamless AI-to-human handover across the enterprise.

