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eBook

A Guide on How to Use Salesforce AgentForce for Manufacturing



Over

1+ Million Hours

of ***salesforce*** Project Experience

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Introduction

1.1 Defining AgentForce

Salesforce **AgentForce** is a next-generation AI platform that introduces digital “agents” or autonomous virtual workers into the Salesforce ecosystem. These agents excel at executing repetitive tasks, orchestrating complex processes, and making real-time decisions based on data. Unlike basic chatbots or rudimentary workflow tools, AgentForce uses advanced machine learning to adapt and learn from ongoing interactions, helping manufacturers operate more efficiently and effectively across sales, service, production, and back-office functions.

Companies that adopt **AgentForce** can leverage existing Salesforce data—from leads and accounts to orders, contracts, and assets—to power their AI-driven workflows. The agents integrate seamlessly with other Salesforce Clouds, such as Sales Cloud and Manufacturing Cloud, drawing on a single source of truth. This ensures that every decision or automation is rooted in accurate, up-to-date data. For mid-size manufacturers, this is a key differentiator: they can get enterprise-level AI and automation without heavy custom coding or expensive implementations.



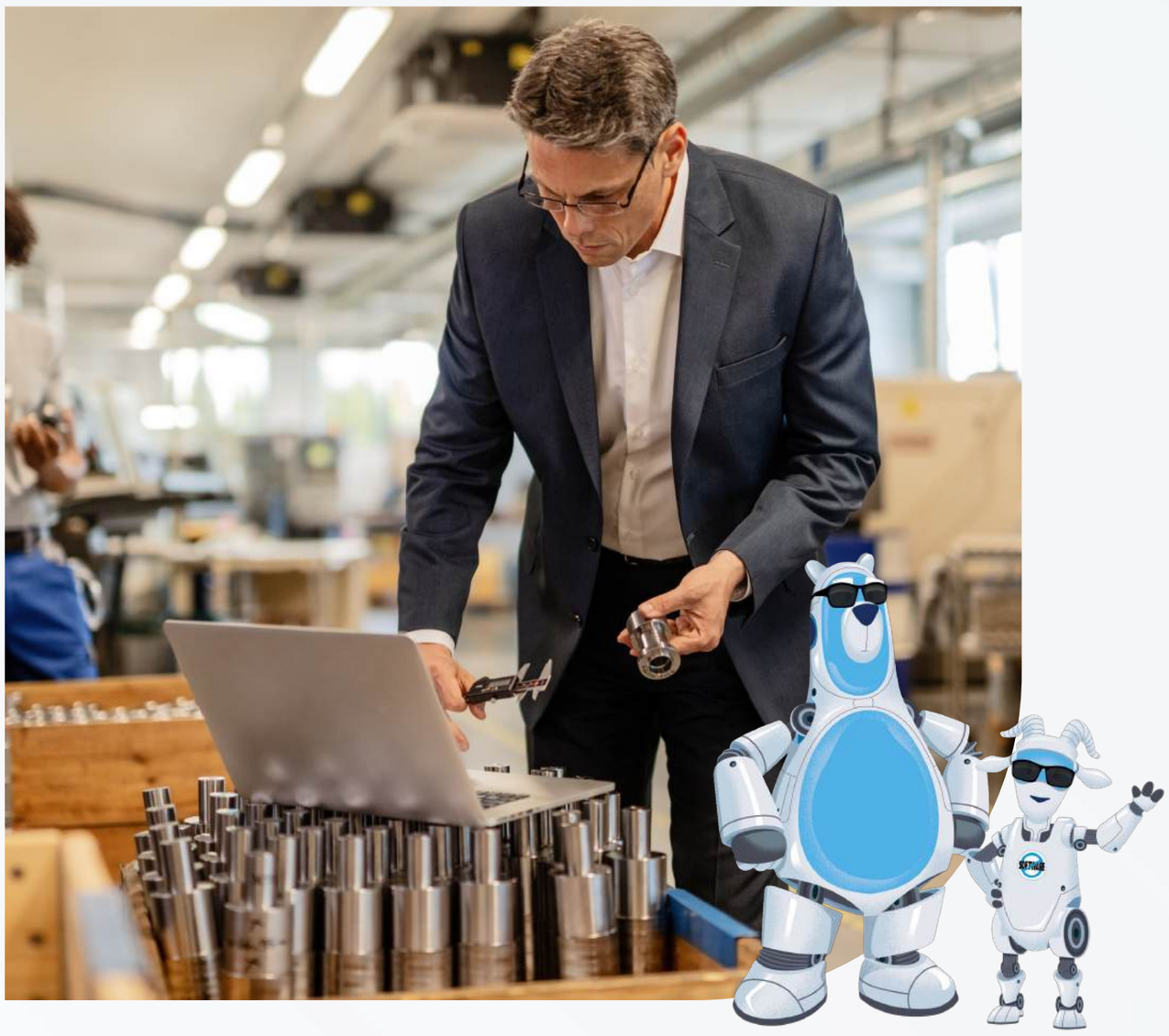
1.2 Embracing AI-driven Manufacturing

Manufacturing as a sector has been quick to adopt robotics and automation on the production floor. However, **AI-driven Manufacturing** expands beyond robotics, encompassing the full spectrum of business processes: from engaging customers in real time to accurately forecasting demand and optimizing supply chains. In one recent survey, 85% of manufacturers stated they need to modernize daily operations to remain competitive, and around 80% are experimenting with artificial intelligence for better efficiency and cost savings.



AgentForce aligns perfectly with this trend. By embedding AI agents into crucial business processes, manufacturers can quickly assess data, offer personalized interactions, and respond to operational events in an automated yet intelligent manner. Whether it’s scoring leads for a new batch of industrial equipment or predicting machine downtime, the principle is the same: let AI handle mundane or data-driven tasks, so skilled employees can focus on strategic initiatives and high-level problem-solving.

1.3 Why Mid-Size Manufacturers Must Adapt



The push to digitize isn't limited to large corporations. Mid-size manufacturers often face even greater competitive pressure because they operate with slimmer margins and fewer resources. Gaps in technology adoption can lead to delayed quotes, suboptimal sales pipelines, and inadequate customer service experiences. Yet these pain points can be overcome through targeted AI solutions.

By implementing **AgentForce**, mid-size firms can reduce administrative overhead, speed up lead response times, automate key workflows, and improve customer satisfaction—often at a fraction of the cost of hiring extra full-time employees. Given that many manufacturing organizations see a direct correlation between lead response time and conversion rate, or between maintenance planning and downtime cost, the ROI potential is substantial.

Key Capabilities and Use Cases

2.1 AI-Enhanced Lead Tracking and Qualification

In a business-to-business manufacturing environment, leads often come from trade shows, partners, distributors, or direct online inquiries. However, sales reps can be overwhelmed, with a significant portion of their time lost to manual data entry or repetitive outreach. Research suggests sales reps typically spend only 28% of their weekly hours actually engaging in direct selling.

Immediate Engagement

As soon as a lead fills out a web form or downloads a brochure, AgentForce sends a personalized email or chat message, bridging the gap between inquiry and human contact.

Automated Follow-Ups

Instead of relying on reps to remember to follow up at set intervals, an agent can queue targeted nurture messages, ensuring warm leads don't go cold.

Smart Lead Scoring

By analyzing attributes like company size, budget, or past purchase history, an AI agent flags which leads are hot and should be forwarded to senior reps, optimizing sales pipeline management.

With shorter response times and more accurate qualification, manufacturers have seen as much as a 20–30% improvement in conversion rates. This benefit is particularly compelling for CFOs and CEOs, who value concrete revenue growth with minimal additional headcount.

2.2 Intelligent CPQ (Configure, Price, Quote)

Manufacturers typically handle complex configurations, variable pricing models, and region-specific discounts. Salesforce CPQ streamlines quoting, but **AgentForce** can add a layer of AI-driven recommendations and real-time adjustments.



Suggestive Selling

Once a rep selects certain configurations, the AI agent can propose complementary parts or optional accessories. If a customer is ordering a specific assembly in large volumes, the agent might suggest bulk discounts or contract pricing.



Dynamic Pricing Adjustments

Relying on historical data and current demand, the agent checks profitability thresholds, ensuring the discount offered doesn't erode margins.



Accelerated Document Generation

AgentForce assembles the quote document (including technical specifications, terms, and branding) in seconds, handing the rep a polished proposal ready to send.

This automation can reduce quote turnaround time from days to mere hours. Faster quotes generally translate to quicker decisions on the customer side, driving more closed deals. For a mid-sized manufacturer, that difference in speed can be the deciding factor in winning business against bigger competitors.

2.3 Sales Forecasting and Demand Planning with AI

Sales forecasting is critical for aligning production schedules, purchasing raw materials, and planning capacity. Traditional forecasting methods rely on historical data and manual input from sales teams, which can lead to inaccuracies. In volatile markets, these inaccuracies can become costly.



Analyzing Pipeline and External Factors:

AI agents can simultaneously factor in current opportunities, seasonal patterns, past performance, and macroeconomic indicators to generate more reliable forecasts.



Rolling Forecast Updates

Instead of static monthly or quarterly updates, AgentForce provides continuous forecast revisions in response to real-time changes, like a spike in demand or a new competitor.



Scenario Modeling

Users can query the agent with "what-if" questions—"What if we run a promotion for Product X?"—and receive a data-driven projection on how it might affect revenue and margins.

Companies adopting AI-driven forecasting have reported a reduction in inventory holding costs and an increase in on-time delivery rates—both of which directly affect the bottom line. CFOs champion these wins because better forecasting leads to less working capital tied up in surplus inventory and fewer rush orders caused by stockouts.

2.4 Integration with ERP and Supply Chain Systems

For manufacturers, the ERP is the backbone of operations: it tracks inventory, schedules production, and manages financials. **AgentForce** can unify the CRM and ERP worlds, so sales, service, and production data remain in sync.

- **Real-Time Inventory Checks:** If a salesperson enters a large order in Salesforce, AgentForce instantly checks ERP stock levels, shipping timeframes, and cost implications.
- **Automated Order Fulfillment:** Once a deal closes in Salesforce, the AI agent can automatically trigger a work order, picking ticket, or purchase requisition in the ERP—no manual bridging required.
- **Shipment Status Monitoring:** When a customer asks for an update, the AI agent queries the ERP or logistics system to provide accurate tracking details, sparing staff from tedious lookups.

Such integrations reduce manual data re-entry, eliminate costly errors, and accelerate order-to-cash cycles. According to industry estimates, companies that fully integrate CRM and ERP can increase operational efficiency by 20–30%.

2.5 Predictive Analytics for Maintenance and Quality

AgentForce extends the concept of **AI-driven Manufacturing** to operational excellence. By ingesting IoT data or maintenance logs, AI agents can predict equipment failure or highlight a likely quality defect before it becomes widespread.

- **Early Warning Alerts:** If a sensor reading deviates from normal parameters, the agent proactively creates a maintenance ticket, scheduling a technician visit during planned downtime rather than a disruptive breakdown.
- **Defect Detection:** The AI can analyze product inspection data, spotting anomalies and flagging specific lots or batches for additional QA checks.
- **Lifecycle Tracking:** For machinery nearing end-of-life, AgentForce can recommend a replacement schedule or alert finance about capital expenditure needs.

By reducing unplanned downtime, predictive maintenance can save manufacturers millions annually, particularly if they operate high-volume lines or rely on just-in-time supply. The quality benefits also drive customer satisfaction and minimize warranty claims.

2.6 Workflow Automation and Process Streamlining

Manufacturing companies juggle numerous workflows—contract approvals, order cancellations, distributor onboarding, product returns, warranty claims, and more. Traditional automation tools can only handle standard paths and often break when faced with exceptions.

- **Exception Routing:** If an order is delayed, the AI agent can re-route the shipment, notify the customer, or expedite production, all without waiting for a manual trigger.
- **Multi-Department Coordination:** Bringing a new distributor on board might require credit checks (finance), training (operations), and system access (IT). The agent orchestrates these tasks, ensuring nothing is missed.
- **Adaptive Approvals:** For discount requests or contract changes that exceed standard thresholds, AgentForce can compile a summary and rationale for the manager, speeding up the final decision.

This adaptive workflow management slashes administrative overhead and shortens cycle times, with some manufacturers seeing a 50% reduction in time-to-completion for multi-step processes.

2.7 Customer Lifecycle Management and Service Excellence

Manufacturers that rely on repeat orders understand the importance of nurturing long-term relationships. **AgentForce** unifies the entire customer journey under one AI-driven umbrella:

- **Automated Onboarding:** After a first purchase, the AI agent sends welcome kits, schedules follow-up calls, and provides training resources, creating a seamless handover from sales to service.
- **Proactive Renewals and Reorders:** By analyzing usage patterns, AgentForce predicts when a customer may be running low on a particular component or consumable, prompting timely reorder offers.
- **24/7 Customer Support:** Basic service inquiries can be handled automatically. For complex issues, the agent gathers context (past tickets, equipment logs, warranty status) and escalates to the right expert.

With faster service response, higher satisfaction scores, and more consistent engagement, the company retains customers and boosts lifetime value. This ongoing loyalty translates directly into profitable repeat business.

Deep Dive: Implementation Strategies

3.1 Identify High-Impact Use Cases

Before jumping into a wide-scale AI project, executives should brainstorm critical pain points:

- **Sales Efficiency:** Do leads slip through the cracks due to delayed follow-ups or poor scoring?
- **Production Downtime:** Are unplanned machine failures driving overtime costs?
- **Service Bottlenecks:** Do service teams spend excessive time on repetitive inquiries or manual escalations?

Choose use cases that directly impact KPIs—like reducing lead response from 48 hours to 4 hours or cutting downtime by 25%. Early “quick wins” will build enthusiasm among leadership and frontline teams.



3.2 Data Readiness and Integration

AgentForce relies on robust data. If CRM records are incomplete or ERP systems are poorly integrated, your AI outcomes may suffer. Ensure you have:

- **Clean, Consistent Records:** Validate customer data, product SKUs, and price lists.
- **Unified Data Model:** A single source of truth for customer profiles, assets, and transactional history.
- **Integration Tools:** Connect Salesforce with ERP or IoT platforms so AgentForce has real-time operational insights.

Many mid-size manufacturers use integration middleware or APIs to unify data. By addressing data quality early, you maximize the effectiveness of AI recommendations.

3.3 Building Custom Agents with Low-Code Tools

Salesforce offers low-code development environments where even non-technical stakeholders can configure **AgentForce** instructions:

- **Agent Builder:** Use drag-and-drop functionality to define tasks, triggers, and data fields your AI agent can access.
- **Pre-Built Industry Templates:** Leverage manufacturing-specific templates, such as a proactive maintenance agent or a reorder management agent.
- **Clear Instructions:** Each agent works best with explicit instructions (e.g., “If a lead is unresponsive for 5 days, send a follow-up email offering a demo”).

Starting small is key. You can build an agent just for lead qualification and then expand its skills to handle more intricate tasks once it’s proven effective.

3.4 Pilot, Iterate, and Scale

A full-blown rollout might overwhelm teams. Instead:

1. **Select a Pilot Group:** Deploy AgentForce to a single sales or maintenance team.
2. **Monitor KPIs:** Track lead conversions, quoting speed, downtime reduction, or whatever metrics align with the pilot’s goal.
3. **Gather Feedback:** Interview users. Where does the AI add value? Where is it confusing or failing to meet expectations?
4. **Iterate:** Revise agent instructions or add features. Test again.
5. **Expand:** Once success is consistent, replicate across other regions or departments.

This iterative method keeps risk low and fosters user buy-in.

3.5 Change Management and Training

Adopting **AgentForce** often alters day-to-day workflows and can raise concerns about AI replacing jobs. Effective change management helps mitigate resistance:

- **Transparent Communication:** Emphasize that AI handles repetitive tasks, freeing employees to focus on strategic work.
- **Hands-On Training:** Offer workshops that show how to interact with AI agents (e.g., how to interpret AI-driven recommendations or escalate issues).

- **User Champions:** Identify early adopters who share success stories, reinforcing the positive impact on job satisfaction and performance.

A well-managed rollout ensures employees see AgentForce as an ally rather than a threat.

Overcoming Common Challenges

4.1 Data Quality and Standardization

One of the most frequent obstacles is poor data hygiene. AI agents rely on accurate inputs—no matter how advanced they are, dirty data leads to faulty decisions. To overcome this:

- **Data Governance Policies:** Establish guidelines on how data is entered, updated, and audited.
- **Ongoing Cleansing:** Routinely remove duplicates or outdated records, especially in CRM or ERP systems.
- **Cross-Team Alignment:** Ensure different departments coordinate on data definitions and usage.

Even a 5–10% error rate in key fields can undermine the reliability of AI-driven actions, so prioritizing data quality is crucial.



4.2 Security, Governance, and Compliance

Mid-size manufacturers handling sensitive customer details or regulated product lines must ensure that **AgentForce** operations meet compliance standards. Salesforce's enterprise-grade security helps, but organizations must still:

- **Define Access Levels:** Restrict what data each AI agent can view or modify.
- **Compliance Checkpoints:** Ensure certain steps in a process require human approval if they involve regulatory compliance.
- **Audit Trails:** Use Salesforce's tracking mechanisms to log each action the AI agent takes, providing transparency.

A robust security posture not only shields sensitive data but also builds trust with partners and clients.

4.3 Balancing AI Automation with Human Oversight

While **AgentForce** can independently manage workflows, some decisions require a human touch—especially those involving major financial commitments or reputational risks:

- **Approval Thresholds:** Set discount or pricing rules so that large deviations automatically trigger managerial review.

- **Escalation Rules:** If the AI agent cannot resolve a unique scenario, it should promptly notify a human subject-matter expert.
- **Gradual Autonomy:** Begin with AI suggestions, letting employees manually confirm. As confidence grows in the AI's accuracy, shift to auto-approvals for routine scenarios.

Maintaining a "human in the loop" for critical steps fosters confidence and accountability.

4.4 Avoiding Scope Creep and Unrealistic Expectations

AI implementations often spark big ideas—some feasible, others less so. To avoid frustration:

- **Start with Clear Goals:** Aim for defined wins—e.g., reduce lead response times by X% in the first six months.
- **Incremental Expansion:** Once the pilot is successful, expand the use case portfolio. Trying to automate all processes at once can lead to confusion.
- **Manage Executive Expectations:** Educate leadership that while AI is powerful, it cannot fix disorganized processes or poor data management without the proper foundation.

A realistic, methodical approach keeps projects on track and fosters sustainable momentum.

Benefits to Key Stakeholders

5.1 CFO: Financial Impact and Cost Control

For CFOs, **AgentForce** offers a direct path to cost savings, productivity gains, and financial predictability:

- **Reduced Downtime:** Predictive maintenance lowers repair expenses and lost productivity.
- **Optimized Inventory:** More accurate forecasts translate into leaner stock levels, cutting holding costs.
- **Scaling Efficiency:** Automating sales and support tasks means you can handle more volume without increasing headcount at the same rate.
- **Better Revenue Visibility:** AI-driven forecasts and real-time updates give CFOs a clearer picture of cash flow and revenue projections.



From a high-level view, these improvements feed into healthier profit margins, stronger ROI, and reduced overall risk.

5.2 CTO/CIO: Technical Integration and Innovation

Technical leaders appreciate **AgentForce** for both its seamless integrations and its focus on innovation:

- **Unified Data Architecture:** CRM, ERP, and IoT data can live in a cohesive ecosystem, eliminating silos.
- **Scalability:** As business grows, the AI can accommodate additional data sources or expanded user groups with minimal reconfiguration.
- **Low-Code Enhancements:** The ability to configure agents without heavy code reduces development bottlenecks.
- **Future-Proofing:** Salesforce continually updates AI features, ensuring the company stays at the technological forefront without needing to rebuild proprietary systems.



By simplifying the digital landscape, **AgentForce** frees IT departments to innovate and focus on more strategic projects, rather than constantly firefighting fragmented systems.

5.3 CEO: Growth, Agility, and Strategic Differentiation

CEOs look for methods to scale the business, improve brand reputation, and respond to market shifts quickly. **AgentForce** contributes significantly to these goals:



- **Rapid Go-to-Market:** Quicker quotes, streamlined sales, and faster lead response help close deals sooner, fueling top-line growth.
- **Operational Agility:** Real-time monitoring of production and sales data allows the organization to pivot based on market signals.
- **Enhanced Customer Experience:** Personalized interactions, proactive maintenance, and timely follow-ups boost customer loyalty.
- **Innovative Edge:** Embracing AI-driven Manufacturing sets the company apart from competitors still relying on heavy manual processes.

By leveraging **AgentForce**, CEOs can fortify the company's position in the market and demonstrate leadership in adopting transformative technologies.

5.4 Sales Executives: Faster Cycles and Higher Conversions

Sales leaders are judged primarily on revenue generation, pipeline health, and team performance. **AgentForce** excels in these areas:



- **Deeper Customer Insights:** AI agents unify past interactions, preferences, and product usage, empowering reps with a holistic view.
- **Faster Quoting:** Intelligent CPQ shortens the negotiation cycle. Time previously spent on admin tasks can be redirected to closing deals.
- **24/7 Lead Engagement:** Potential buyers receive immediate attention regardless of time zone, giving your sales team a global advantage.
- **Actionable Forecasts:** Forecasting that adjusts in real time helps sales leaders hit targets and plan resources.

When sales teams spend more hours actually selling, conversion rates inevitably rise—and so does revenue.

Advanced Tips for Maximizing AgentForce

6.1 Harnessing Real-Time Data in AI-driven Manufacturing

Manufacturing environments are often data-rich, with sensors, machine logs, shipping trackers, and more. To fully leverage **AgentForce**:

- **Embed IoT Feeds:** Stream real-time machine data to Salesforce, where agents can detect anomalies or usage spikes immediately.
- **Dynamic Pricing:** If certain materials become scarce or expensive, an AI agent can adjust product pricing automatically for new quotes.
- **Geo-Targeted Campaigns:** Align promotional offers with real-time logistical data, ensuring local inventories match marketing pushes.



Combining real-time data with AI ensures you're always reacting to current market conditions, not outdated snapshots.

6.2 Leveraging Chat Interfaces and Voice Assistance

Some manufacturers use chatbots or voice interfaces (like a voice assistant on the factory floor) for rapid data access. **AgentForce** can power these interfaces:

- **Chatbot Integration:** A sales rep might ask in a Slack channel, "When can we deliver Product A if an order comes in this week?" The AI agent returns a detailed answer instantly.

- **Voice Commands:** In a production setting, an operator could say, “Check the status of machine #102,” and the AI agent replies with uptime stats or the next scheduled maintenance date.
- **Omnichannel Consistency:** Regardless of channel—website chat, mobile app, or voice—the agent uses the same central knowledge base.

Streamlined communication reduces friction and speeds up decision-making, particularly in fast-paced environments.

6.3 Integrating Predictive Insights into Daily Operations

To ensure predictive analytics don’t sit idle in dashboards, embed them into routine processes:

- **Auto Alerts:** If the forecast indicates a 15% chance of a major sales shortfall next month, the AI agent alerts the sales manager to adjust territory coverage or launch an extra campaign.
- **Maintenance Scheduling:** If the agent detects a rising failure probability for a critical machine, it proactively schedules a technician visit, including parts ordering.
- **Quality Checks:** For product lines with high defect sensitivity, the agent can trigger extra inspections when patterns indicate a heightened defect risk.

These real-time nudges keep the organization proactive, turning insights into tangible actions that reduce costs and improve quality.

6.4 Future Trends: Expanding AgentForce Beyond Sales and Service

The capabilities of **AgentForce** in a manufacturing context can extend well beyond initial deployments:

- **Human Resources:** Automating recruitment workflows, screening resumes for production roles, or onboarding new employees.
- **Procurement Optimization:** Negotiating raw material prices with vendors, analyzing global supply chain risks, or adjusting orders based on real-time demand shifts.
- **Advanced Analytics:** Layering machine learning models on top of existing AI agents for specialized tasks like warranty fraud detection or pricing optimization across multiple markets.
- **Sustainability Metrics:** Tracking environmental data (emissions, energy usage) in real time and suggesting ways to reduce the carbon footprint.

By continuously exploring these avenues, manufacturers can build an end-to-end AI-driven Manufacturing ecosystem that covers every department and strategic function.

How Mirketa Can Help

Mirketa is a specialized Salesforce partner with deep expertise in Salesforce implementation, including **AgentForce**. We have a proven track record of helping manufacturing clients streamline their business processes, integrate data sources, and maximize ROI from Salesforce solutions. Here’s how we can support your manufacturing organization:

AgentForce Implementation & Customization

We tailor **AgentForce** agents to align with your unique manufacturing workflows, whether it's configuring predictive maintenance alerts, automating complex CPQ processes, or enabling AI-driven lead qualification. Our experts ensure each AI agent is fine-tuned for accurate insights and smooth user adoption.

End-to-End Salesforce Integration

We integrate Salesforce CRM, ERP systems, and any existing enterprise applications to provide a single source of truth for data. With MuleSoft or other integration tools, we unify manufacturing data (inventory, orders, production schedules) so **AgentForce** can act intelligently across your entire operation.

Scalable Process Automation

Our team identifies critical workflows—like order fulfillment, partner onboarding, or service case handling—and automates them with **AgentForce** and Salesforce's low-code tools. This reduces manual steps, accelerates cycle times, and increases consistency.

Change Management & Training

A successful **AgentForce** rollout requires user buy-in and proper training. Mirketa provides change management best practices, user training sessions, and ongoing support to help your team fully leverage AI-driven processes.

Scalable Process Automation

Our team identifies critical workflows—like order fulfillment, partner onboarding, or service case handling—and automates them with **AgentForce** and Salesforce's low-code tools. This reduces manual steps, accelerates cycle times, and increases consistency.

With Mirketa's focused approach and proven know-how in **AgentForce** for manufacturing, you gain a long-term partner who can guide you at every stage of your digital transformation journey.

Conclusion: Shaping the Future of Manufacturing with AgentForce

Salesforce AgentForce offers a compelling blend of automation, intelligence, and integration tailored to manufacturing's unique demands. By incorporating AI into lead generation, quoting, production forecasting, maintenance, and customer service, manufacturers can achieve operational excellence and sustained growth in an intensely competitive market.

- **Streamline Sales Processes:** By automating lead qualification and quotes, your reps can focus on strategic discussions and closing deals, leading to higher conversions and more stable revenue.
- **Enhance Customer Experiences:** Proactive notifications, rapid follow-ups, and personalized engagement foster loyalty and ensure customer satisfaction.

- **Reduce Costs and Downtime:** Predictive analytics spot issues before they escalate, while real-time data ensures resources are deployed where they matter most.
- **Empower Teams:** Employees can offload repetitive tasks, freeing them to tackle higher-level challenges and creative problem-solving that moves the business forward.

For CFOs, the financial upside includes lower operational costs and better capital allocation. CTOs appreciate simplified integration and scalable AI architecture. CEOs gain a future-ready, data-driven organization that can pivot swiftly in changing markets, and Sales Executives enjoy automated support that boosts their own success.

As the industry continues to evolve, **AI-driven Manufacturing** will become not just a competitive advantage but a standard operating requirement. Those who embrace **AgentForce** early will differentiate themselves through agility, superior customer experiences, and robust productivity gains. The time to adopt this transformative platform is now. By following the strategic steps outlined—setting clear goals, ensuring data readiness, starting small, iterating, and scaling—you can confidently integrate AgentForce into your manufacturing operations and secure your place as a forward-thinking leader in this new era of intelligent automation.





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