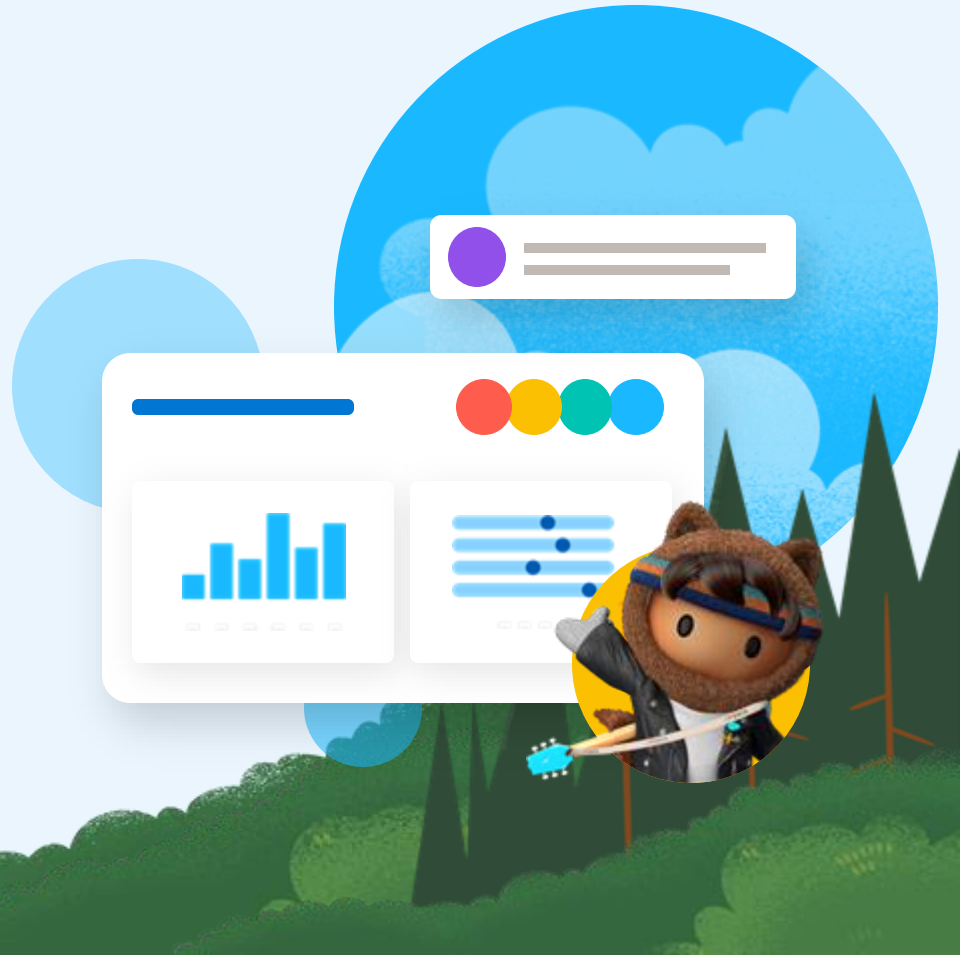




Build Your First Agent with Tableau and Agentforce



Forward looking statement

This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, anticipated growth and industry prospects, and our strategies, expectation or plans regarding product releases and enhancements. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, results or outcomes could differ materially from those expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: our ability to meet the expectations of our customers; uncertainties regarding AI technologies and its integration into our product offerings; the effect of evolving domestic and foreign government regulations; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features; our ability to execute our business plans; the pace of change and innovation in enterprise cloud computing services; and our ability to maintain and enhance our brands.



Thank you



What's one AI-related task
you wish you could
automate today?

Drop your answers in the chat box located on
the right side of your screen.



If you could name your AI agent after anyone, fictional or real, what name would you choose?

Drop your answers in the chat box located on the right side of your screen.



Agenda

Tableau and Agentforce

Workshop:

Analyze service metrics with Tableau Agent

Create your own Agent with Agentforce

Evaluate impact with Tableau Pulse

+ Q&A



Our Speakers



Jeremy Blaney

Senior Director, Product
Marketing



Kiyoshi Jones

Senior Director, Solution
Engineering

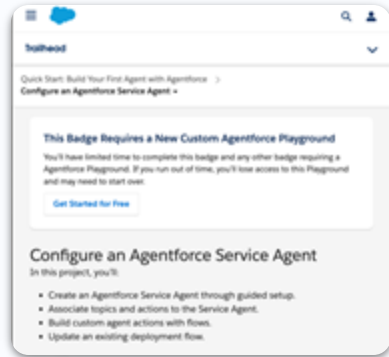


Shauna Goldman

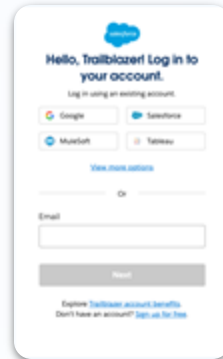
Product Marketing Manager

Getting Ready

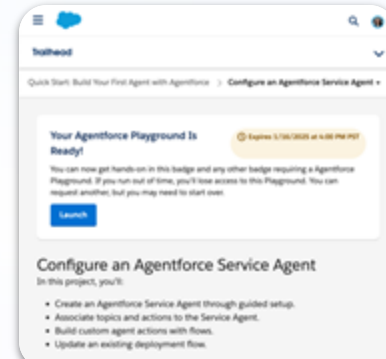
Open the BYO Agent Trail



Login or Create Your Account



Connect/Launch Playground



Open the Playground

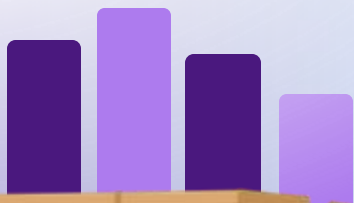


Struggling to harness data

Analysts are drowning in tasks

Insights are overlooked or ignored

Data landscape is large, fragmented



Revolutionizing work with AI

More capacity to create more value

Analytics embedded in workflows

Tap into all data, even unstructured



91%

of leaders believe
AI can benefit their
organization¹

GA

Agentforce

The Digital Labor Platform

salesforce

Humans with agents drive customer success together on the Salesforce Platform

Trusted

Easy to deploy

Humans in the loop

Zero hold time

Integrated

Open



Innovation, industry solutions & global community

Agentforce and Tableau

Pre-built skills deliver agentic AI for analytics



Data Pro

Accelerate data
prep & modeling

Visualize data instantly

Enrich metadata & semantic
model



Concierge

Ask questions in
natural language

Get accurate,
context-rich answers

Act immediately at
the point of insight



Inspector

Monitor key business metrics
at scale

Surface proactive, actionable
insights

Identify hidden trends and
opportunities



Analytical Apps

Build fast with best practice
templates

Turn insights into
actions seamlessly

Empower everyone, everywhere with agentic AI to do more with data



Data Pro

Prepare and visualize data



Concierge

Enable trusted data Q&A



Inspector

Deliver proactive insights



Analytical Apps

Build solutions for action



In Tableau:
Natively Integrated

Use ready-made skills in the new Tableau and Tableau Cloud.

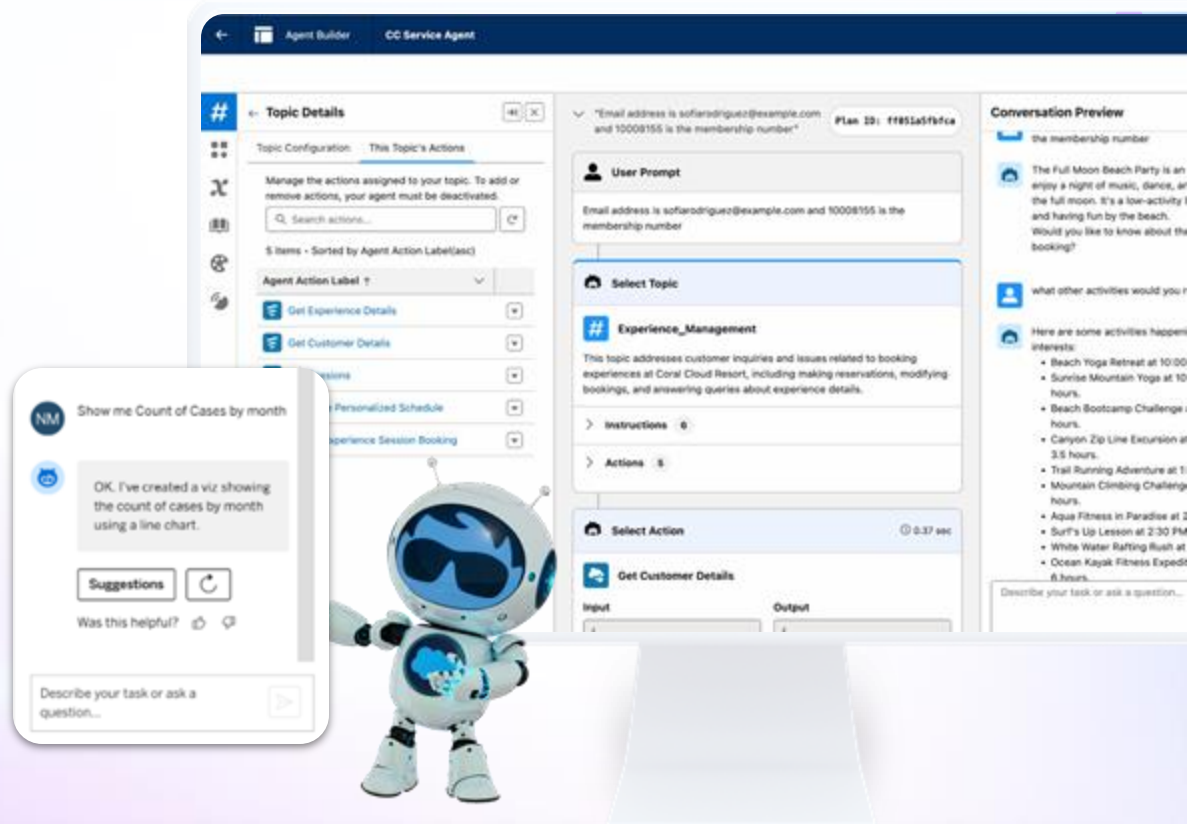


With Agentforce:
Enrich Every Agent

Upskill agents to create a data literate digital workforce.



Let's get into the workshop!



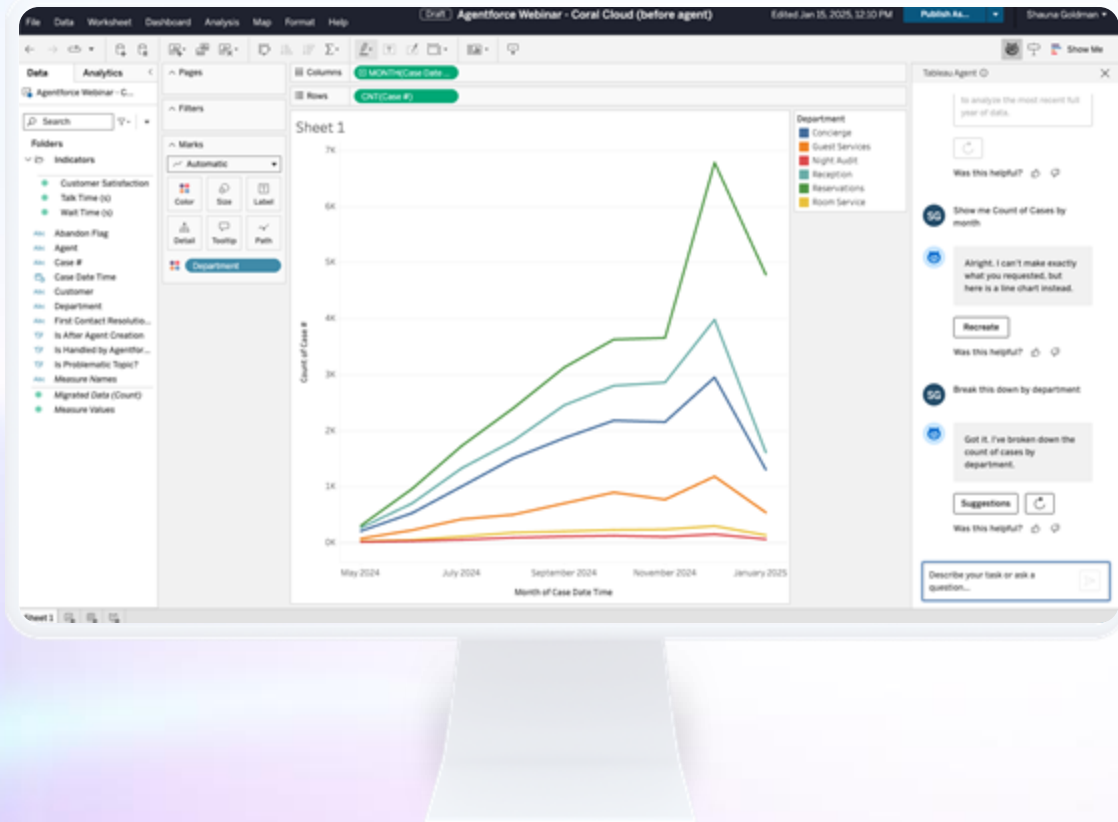
The image displays a screenshot of the 'Agent Builder' interface for a 'CC Service Agent'. The interface is divided into several sections:

- Topic Details:** Shows 'Topic Configuration' and 'This Topic's Actions'. It includes a search bar for actions and a list of actions such as 'Get Experience Details' and 'Get Customer Details'.
- User Prompt:** Contains the text: "Email address is sofia@rodri@example.com and 10008155 is the membership number".
- Select Topic:** Features a topic named 'Experience_Management' with a description: "This topic addresses customer inquiries and issues related to booking experiences at Coral Cloud Resort, including making reservations, modifying bookings, and answering queries about experience details." It also shows 'Instructions' and 'Actions' sections.
- Select Action:** Shows a selected action 'Get Customer Details' with a duration of 0:37 sec.
- Conversation Preview:** Displays a simulated conversation with a user asking for the membership number and the agent providing details about a beach party and other activities.

In the foreground, a small, friendly-looking robot character with a blue and white body and a large, expressive face is standing next to the screen. Below the screen, there is a smaller, rounded rectangular window showing a chat interaction:

- User (NM):** "Show me Count of Cases by month"
- Agent (CC):** "OK, I've created a viz showing the count of cases by month using a line chart."
- Buttons:** 'Suggestions', a refresh icon, and a feedback prompt "Was this helpful?" with thumbs up/down icons.
- Input field:** "Describe your task or ask a question..."

Tableau Agent



Build Your Own Agent

Agent Builder CC Service Agent Settings Help

Deactivate

Topic Details

Topic Configuration This Topic's Actions

Manage the actions assigned to your topic. To add or remove actions, your agent must be deactivated.

Search actions...

5 items • Sorted by Agent Action Label(asc)

Agent Action Label ?

- Get Experience Details
- Get Customer Details
- Get Sessions
- Generate Personalized Schedule
- Create Experience Session Booking

Email address is sofia.rodriguez@example.com and 10008155 is the membership number #Plan ID: f9931a5fbfca

User Prompt

Email address is sofia.rodriguez@example.com and 10008155 is the membership number

Select Topic

Experience_Management

This topic addresses customer inquiries and issues related to booking experiences at Coral Cloud Resort, including making reservations, modifying bookings, and answering queries about experience details.

Instructions 6

Actions 5

Select Action

0.37 sec

Get Customer Details

Input Output

Conversation Preview

the membership number

The Full Moon Beach Party is an exciting event where you can enjoy a night of music, dance, and bonfires on the beach under the full moon. It's a low-activity level event, perfect for relaxing and having fun by the beach. Would you like to know about the available sessions or make a booking?

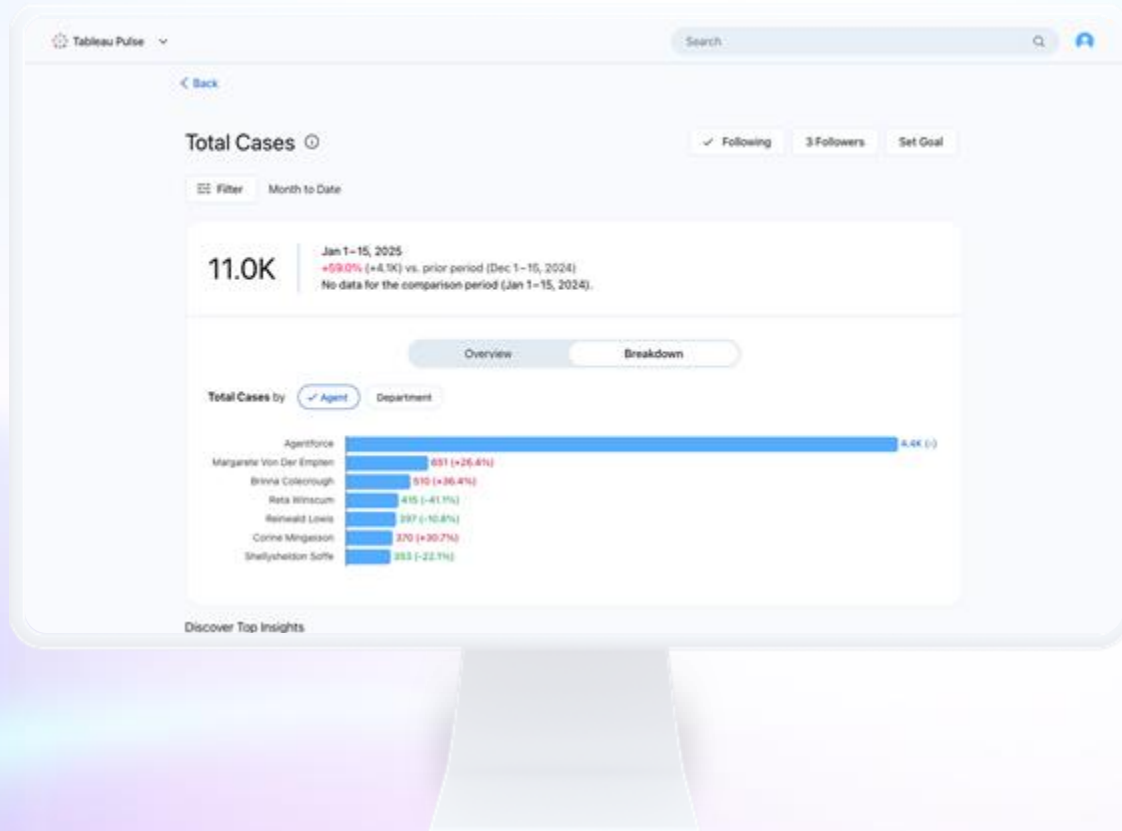
what other activities would you recommend?

Here are some activities happening today that match your interests:

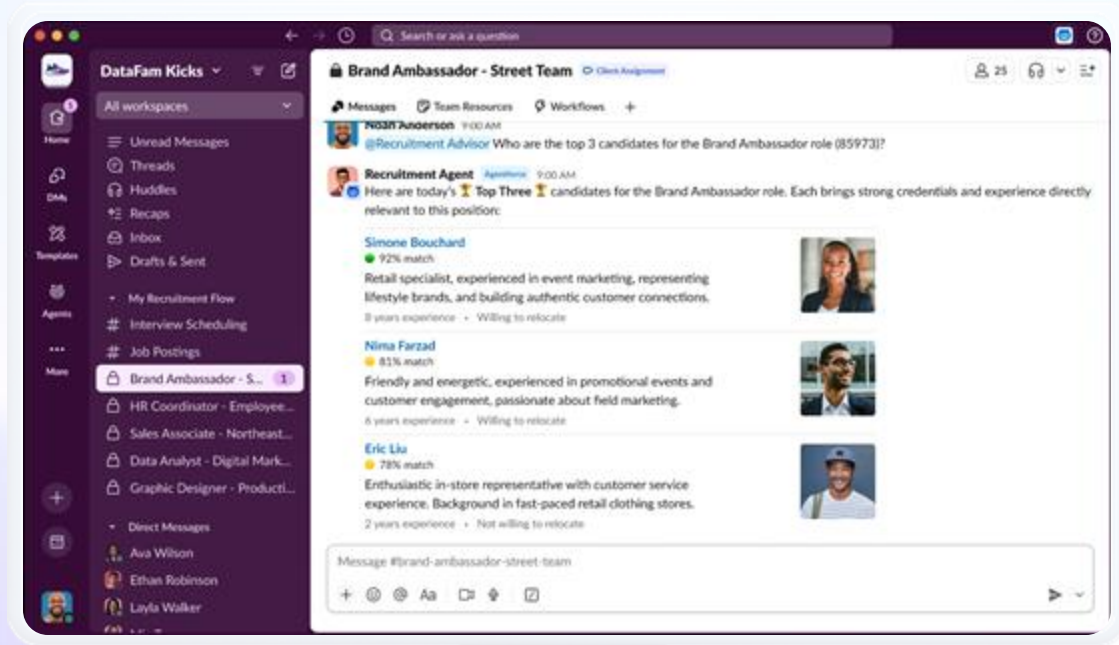
- Beach Yoga Retreat at 10:00 AM, Beach, 2 hours.
- Sunrise Mountain Yoga at 10:30 AM, Mountain Overlook, 6 hours.
- Beach Bootcamp Challenge at 12:00 PM, Beachfront, 4 hours.
- Canyon Zip Line Excursion at 1:00 PM, Canyons & Forests, 3.5 hours.
- Trail Running Adventure at 1:00 PM, Nature Trails, 1 hour.
- Mountain Climbing Challenge at 1:00 PM, Mountain Peaks, 6 hours.
- Aqua Fitness in Paradise at 2:00 PM, Resort Pool, 3 hours.
- Surf's Up Lesson at 2:30 PM, Surfing Areas, 1 hour.
- White Water Rafting Rush at 3:30 PM, Rivers, 1 hour.
- Ocean Kayak Fitness Expedition at 3:30 PM, Coastal Waters, 8 hours.

Describe your task or ask a question...

Tableau Pulse



Future Of Agentforce



Ask Us Anything



Jeremy Blaney

Senior Director, Product
Marketing



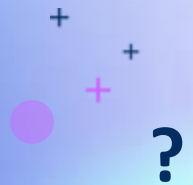
Kiyoshi Jones

Senior Director, Solution
Engineering



Shauna Goldman

Product Marketing Manager



Thank you



We want to hear
from you.

Before you go, please tell us
how we did with this
presentation by scanning the
QR code.



SCAN HERE