

Cracking the **AI Code** in **Consumer Goods** with **Salesforce** and **Agentforce**

Why AI-Ready Businesses Win at Customer Experience

Your roadmap to scalable, AI-driven success in Consumer Goods—elevating customer experience, driving operational agility, and unlocking growth opportunities. Designed and delivered with Cloudgaia's industry-leading Salesforce expertise.

cloudgaia | 



Everyone
is betting big on AI
but without the right
data foundation,
autonomous agents
won't deliver their
full value.

**Before Agentforce can scale across
your business, your architecture must
be ready to:**

- **Eliminate manual, fragmented workflows** with automation.
- **Modernize your data pipelines** to deliver insights and actions in real time.
- **Unify and clean your data** to enable real-time insights.
- **Eliminate silos** that block cross-channel insights and decision-making.
- **Create a shared, scalable backbone** across your teams.

Architecture is the connective
tissue between your data and
business impact.

When your platforms can move,
model, and activate data
seamlessly, you create the
foundation for AI to enhance
customer experience,
streamline operations,
and scale growth.

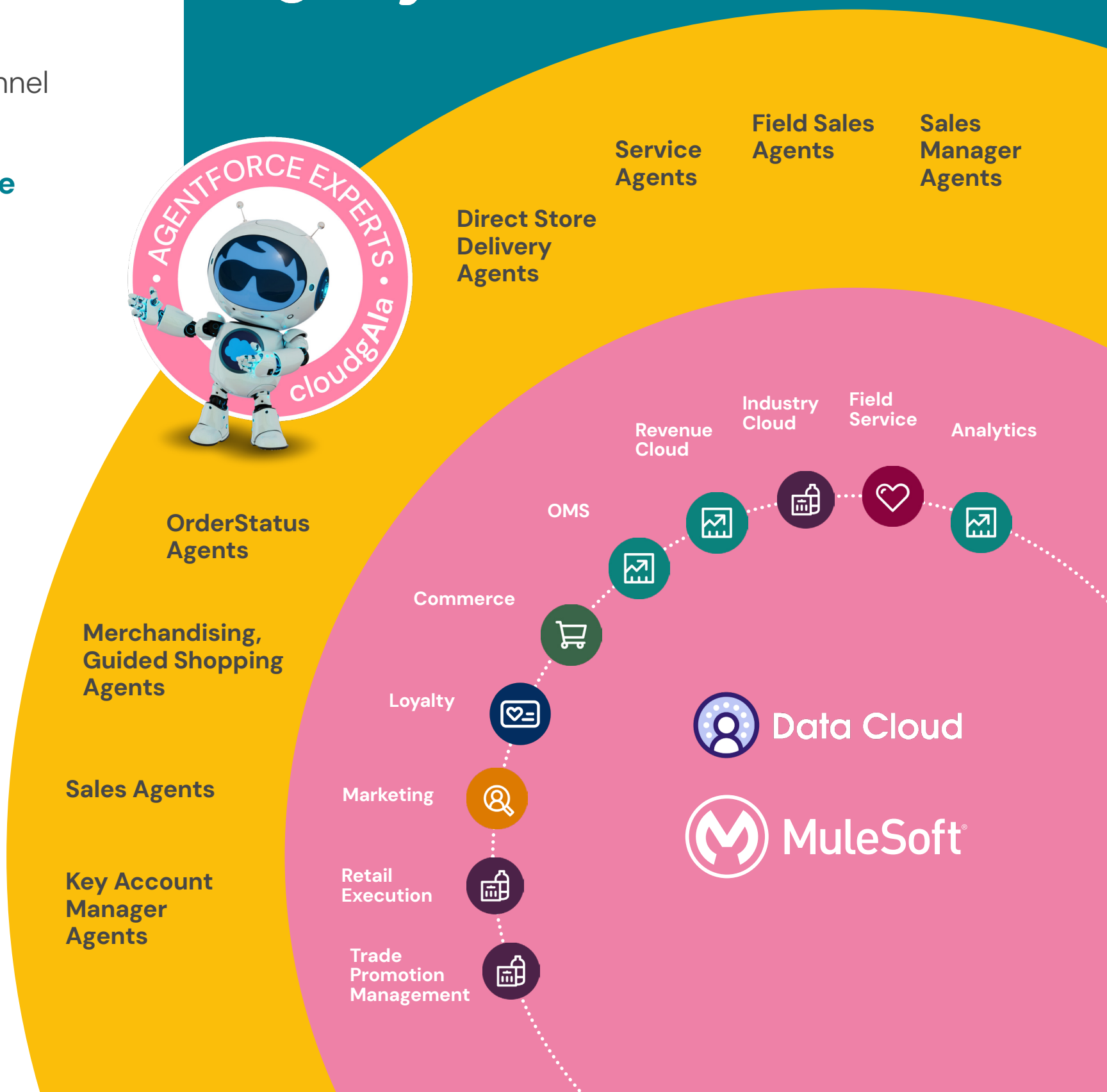
72% of CIOs say simplifying
their architecture is key
to driving innovation (*Gartner, 2024*)

88% of CG companies
have budgeted for AI,
but only 32% are fully implemented
(*Salesforce AI in Consumer Goods Report,
2024*)

Customer Engagement Platform

A technology that delivers personalized and seamless service across all channels. Add AI and reliable data to your customer relationship platform (CRM) with omnichannel engagement, and you'll further enhance the customer experience.

Agentforce



From Industry Pains to AI Gains

If you run a Consumer Goods business, you know the struggle:



High volumes of repetitive service requests draining your teams' time.



Slow and inconsistent sales follow-ups that cost opportunities.



Manual, error-prone processes in marketing, sales, and operations.



Fragmented customer data preventing a 360° view of the buyer journey.



Difficulty scaling personalized experiences across markets and channels.



Juan Carlos Lopez,

Cloud Executive Consumer
Goods at Cloudgaia



As Consumer Goods companies advance in their digital maturity, it becomes essential not only to optimize operations but also to rethink how they approach growth, customer engagement, and channel strategies. ”

| From Consumer Goods: [The Path to Digital Excellence](#) 

AI transforms these pains into opportunities, automating what slows you down, acting on real-time insights, and delivering the kind of customer experiences that win loyalty.



Automates manual processes across marketing, sales, and operations

Say goodbye to repetitive, low-value tasks. From scheduling store visits to processing order inquiries and managing customer reservations, Agentforce handles it all in the background. This frees up your teams to focus on strategy, customer relationships, and execution quality—where the real impact lies.



Makes decisions based on real-time CRM data

Whether it's surfacing high-potential leads, triggering a workflow after a sales stage update, or detecting a shift in customer behavior, Agentforce acts instantly based on live CRM signals. The result: faster decisions, smarter actions, and less reliance on outdated reports or manual checks.



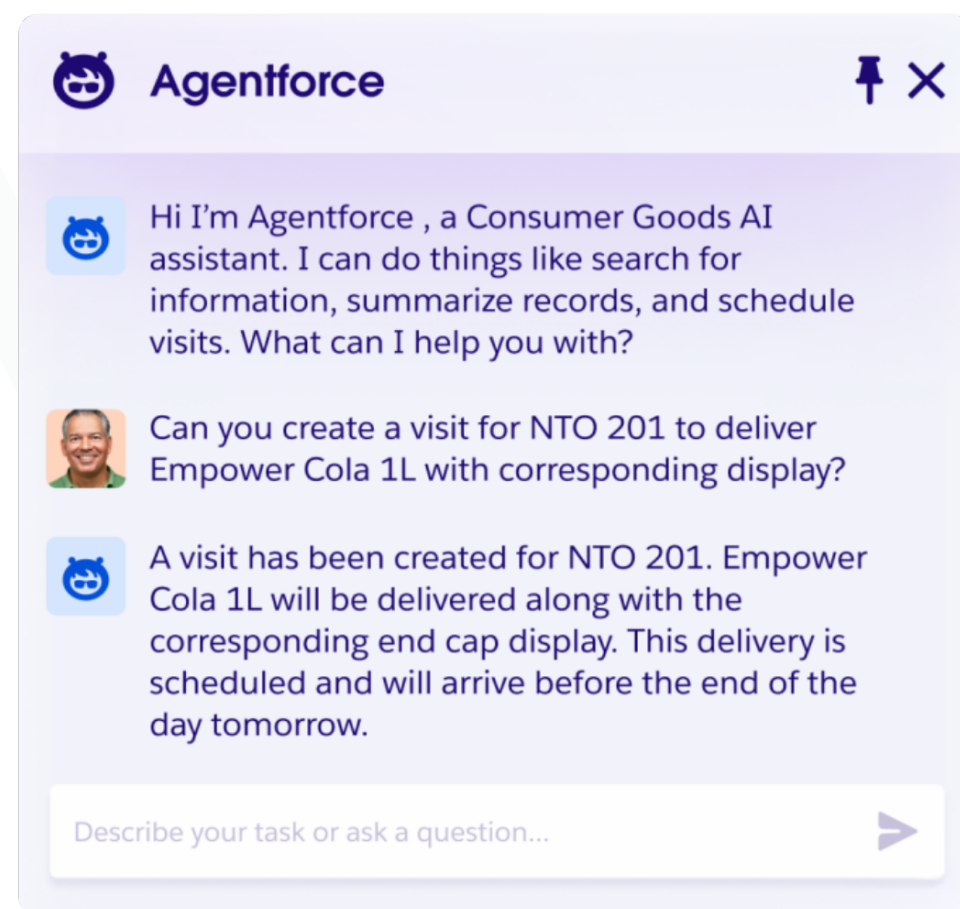
Delivers personalized experiences that convert and retain

In a world where customers expect relevance, Agentforce uses AI to adapt content, journeys, and offers in real time. From dynamic email copy to tailored promotions and smart follow-ups, it ensures every interaction feels like it was designed just for that customer.

Meet Agentforce

Agentforce is Salesforce's native AI framework, designed to help enterprises build, deploy, and scale autonomous agents that act intelligently across departments like sales, service, marketing, and operations.

Unlike third-party AI integrations, Agentforce is built directly into the Salesforce platform—leveraging your existing data, workflows, and architecture to deliver proactive, real-time automation that's secure, governed, and enterprise-ready.



Agentforce enables companies to create AI-powered agents that:



Understand and act on real-time CRM events.

Automate decision-making and suggest next best actions.

Generate personalized content and recommendations.

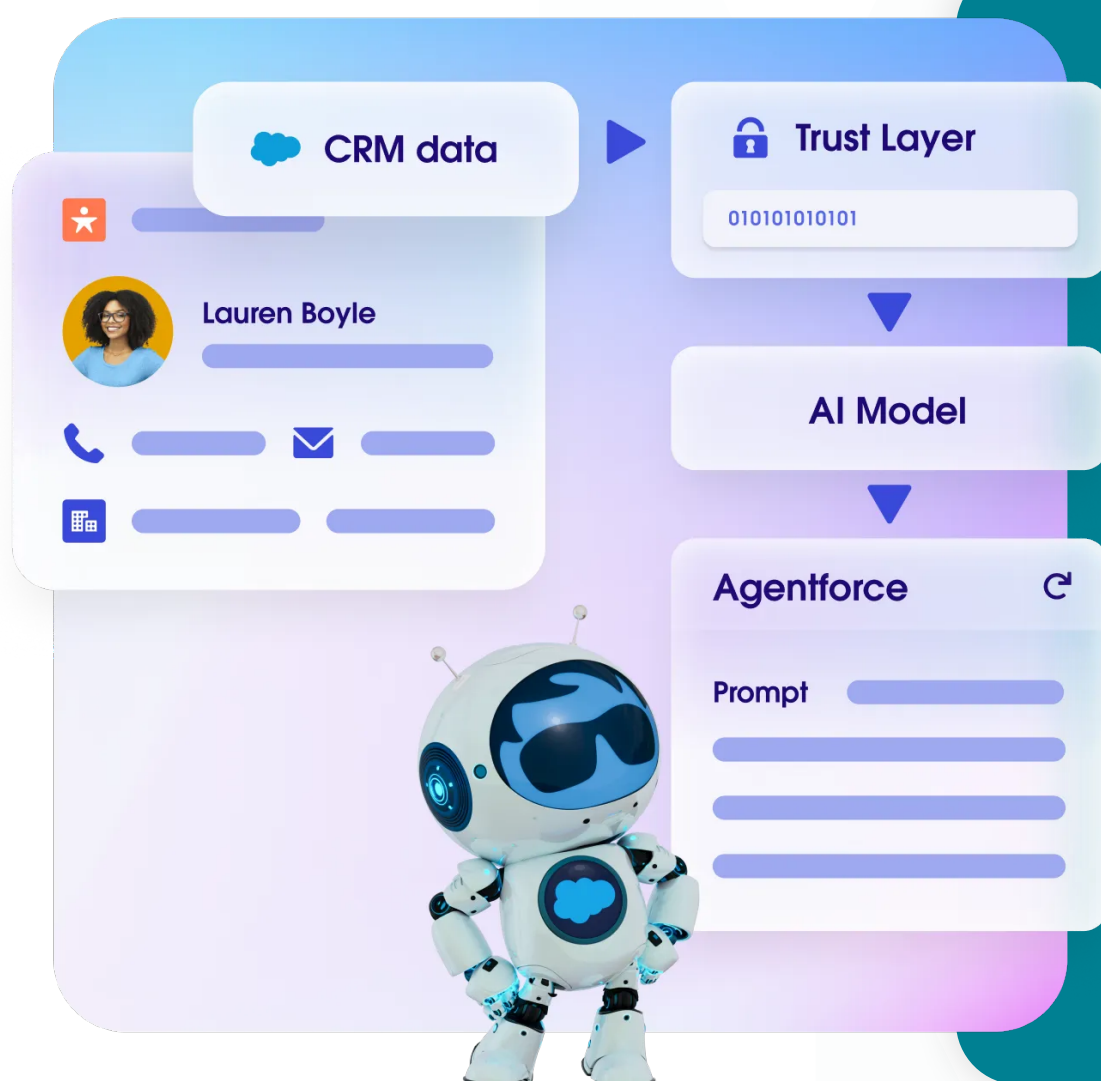
Collaborate across marketing, service, commerce, and IT teams.

These agents can take many forms:

Sales Coach Agents, Service Agents, Marketing Agents, Commerce Agents, even Platform Agents that support IT and HR operations. They're not just chatbots—they're intelligent extensions of your team.

To implement Agentforce, companies define **five core components**:

- 01 Role & Purpose** → Define what the agent is responsible for (e.g. sales enablement, case routing, content generation).
- 02 Trusted Data** → Connect your data securely from Salesforce and external systems to ensure real-time visibility.
- 03 Actions** → Specify what the agent can do—send emails, assign leads, answer questions, generate reports, etc.
- 04 Guardrails** → Set up ethical boundaries and operational controls.
- 05 Channels** → Choose where the agent interacts (Slack, Email, Web, Service Cloud, etc.)



Key Differentiators:

- Proactive & Autonomous:** Agents don't just respond, they initiate and complete tasks.
- Enterprise Security:** Einstein Trust Layer ensures data privacy and compliance.
- Scalable Architecture:** Deploy across any channel (web, mobile, Slack, SMS, WhatsApp).
- Grounded in Trusted Data:** All responses based on your business data and knowledge.
- Seamless Integration:** Works within your existing Salesforce ecosystem.

Autonomous Agents: Changing the Rules of Engagement

An autonomous agent is an advanced form of AI that can understand a goal, create and execute its own tasks, and adapt until the objective is complete, without human intervention. Unlike traditional software bound

by static rules, these agents operate in dynamic environments, making them ideal for complex processes in customer service, sales, marketing, commerce, and operations.

Through machine learning, natural language processing, and real-time data analysis, they:

- Gather and interpret data from CRM, transactions, and external sources.
- Make decisions aligned with business objectives.
- Execute actions, resolving cases, processing orders, triggering workflows.
- Learn and refine their performance with every interaction.



When combined with Salesforce, these agents personalize experiences, anticipate needs, and work seamlessly across channels like WhatsApp, Slack, and voice, scaling precision and efficiency across your business.



Florencia Cattelani,

Chief Operations Officer
at Cloudgaia



By addressing critical challenges related to visibility, control, and interoperability, Salesforce is paving the way for broader adoption and more impactful deployment of AI agents across diverse industries.



From Salesforce Agentforce 3: [Revolutionizing AI Agent Management for Enterprises](#)



What powers these agents?

Agentforce

is an ecosystem powered by three key Salesforce technologies that work together to deliver autonomous, intelligent business outcomes.



1. Data Cloud

The fuel for intelligent agents

Centralizes all your structured and unstructured data from any source, harmonizes it in real time, and makes it instantly available for AI-driven actions. With Data Cloud, Agentforce agents operate on a single source of truth, ensuring consistent, accurate, and up-to-date information across marketing, sales, service, and operations.

2. Atlas

2. Atlas

The intelligence behind Agentforce

Atlas is an advanced reasoning and learning engine that:

- Plans and optimizes actions based on business goals, adapting in real time.
- Retrieves the most relevant enterprise data to avoid AI hallucinations.
- Applies guardrails to ensure compliance, escalation protocols, and consistency.

3. Einstein GPT

The creative and predictive layer

Generates personalized, context-aware content—from marketing assets to sales emails—and predicts next-best actions based on real-time CRM signals. With Einstein GPT, every interaction becomes more relevant and more likely to convert.

Together, these three layers create an AI-powered ecosystem that doesn't just automate: it thinks, adapts, and scales with your business.



Thiago Schmitz,
Salesforce Core Cloud
Executive at Cloudgaia



Today, with the capabilities of Agentforce and Data Cloud, companies can automate decisions, scale processes, and offer hyper-personalized experiences in near real-time.



From [Agentforce + Data Cloud: Transforming Your CRM into an Autonomous and Scalable Platform with AI](#)

Don't Let Legacy Hold You Back **AI is not coming. It's here.**

GenAI and AI agents are **business-critical tools**. Agentforce is transforming operations with intelligent agents that automate tasks, execute workflows, and provide support in key areas such as **Sales, Service, Marketing, IT, Finance, and Commerce**.

51%



of Consumer Goods companies report **revenue growth from GenAI** implementation and adoption.

Real and
measurable value

43%



are **already using GenAI** to generate personalized responses for customer service agents.

Boost satisfaction
and reduce costs

This is the adoption gap,
and your opportunity. **You don't
have to be first. But you really
don't want to be last.**

Source: Salesforce AI in
Consumer Goods Report,
2024

Agentforce works for your business

Agentforce transforms Salesforce into an autonomous, always-on engine that connects data, automates workflows, and personalizes experiences in real time. Leveraging custom AI models, the platform adapts to specific industry needs, allowing businesses to handle complex scenarios and align AI behavior with their engagement strategies.

This approach addresses key challenges across different roles in your organization.



As CIO of a global Consumer Goods company, you implement Agentforce to connect ERP, commerce, and CRM data. Your team moves from reactive IT firefighting to proactively enabling business innovation, securely and at scale.

Industry Challenge:

Consumers expect instant, personalized interactions across channels. Disconnected campaigns, inconsistent offers, and slow adaptation to market shifts lead to churn and revenue leakage.

Agentforce Solution:

- Real-time personalization of journeys, offers, and promotions.
- AI-driven audience segmentation without SQL or manual imports.
- Automated campaign triggers based on live CRM signals.



As a Marketing Operations Manager, you use Agentforce to auto-generate personalized post-event follow-ups with relevant product links and next steps. What once took days now happens in minutes, freeing your time to focus on higher-value initiatives.



90% of global CG executives expect profitable growth by 2025, yet achieving this growth requires more than incremental improvements—it demands transformation. This whitepaper explores how Salesforce and Cloudgaia are empowering CG brands to overcome industry challenges and unlock a new era of intelligent, sustainable, and connected growth.



Florencia Cattelani,
Chief Operations Officer
at Cloudgaia

From [Reimagining Growth in Consumer Goods](#)



Industry Challenge:

Your infrastructure is fragmented, data is inconsistent, and integrating AI feels risky without a solid architecture. Regulatory demands and security concerns slow transformation.

Agentforce Solution:

- Unifies data across Salesforce Clouds and external systems.
- Automates governance workflows for compliance and security.
- Establishes a scalable AI-ready architecture that reduces TCO.



As VP of Customer Experience, you deploy Agentforce to adapt every customer touchpoint in real time, whether it's a tailored loyalty reward in your app or a promotion triggered by a recent purchase. Engagement rates climb, churn drops, and loyalty scores improve.

Industry Challenge:

You spend hours on repetitive admin work, updating records, segmenting audiences, and crafting manual follow-ups, while strategic tasks are delayed.

Agentforce Solution:

- Automates repetitive workflows like meeting note summaries, follow-up emails, and task creation.
- Generates dynamic content with Einstein GPT based on customer context.
- Triggers operational workflows instantly upon data changes.

Why This Changes Everything

Let's explore more
real-world use cases
for your business:

According to Salesforce (2024)



67% of marketers
say disconnected data limits personalization.

**Agentforce solves this with
dynamic, responsive journeys
that evolve with your pipeline.**



Agentforce automates manual processes in marketing, sales, and operations, makes decisions using AI based on real CRM data, breaks silos between B2B and B2C, and enhances sustainability through optimized planning. It's not just another tool. It's a new way of operating, scaling, and connecting with your customers. ”



Becky Wright,
EVP Growth at Cloudgaia

From [Reinventing Customer Engagement in Consumer Goods with Agentforce and Salesforce](#)



Delivering standout customer experiences has become a defining factor in the Consumer Goods industry. With rising expectations and tighter competition, companies must shift from traditional service models to intelligent, proactive, and personalized engagement strategies.

Smart Segmentation without SQL



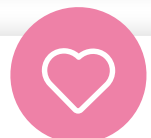
Many campaigns require complex audiences that combine attributes from multiple objects in Salesforce. Previously, this involved SQL, multiple synchronizations, and technical team intervention. With Agentforce and Salesforce Campaigns, that's a thing of the past. Now, you can create segments directly from the CRM, with AI suggesting audiences based on purchase intent, historical behavior, and firmographics.

Real-time Nurturing for Complex Sales Cycles



Agentforce, campaigns are fueled in real-time with CRM data, and actions are triggered automatically when key fields update, such as a new opportunity, stage change, or intent signal. Moreover, AI adjusts the content to each lead's context, ensuring every interaction is relevant, timely, and effective. Your journeys become dynamic, scalable, and ready to adapt.

Dynamic Content without Coding



Personalizing content at scale used to be a costly and error-prone task. Rules, complex templates, and AMPscript made it difficult to adjust messages for different segments or channels. Now, with Einstein GPT, you can generate personalized content in seconds. From texts and calls to action to designs tailored by product or channel, everything is created and updated automatically based on context. More personalization, less effort, and more consistency at every touchpoint.

Internal Productivity with Applied AI



Agentforce also enhances internal team efficiency. It automates repetitive tasks such as answering FAQs, generating post-meeting emails with relevant content, or turning meeting notes into actionable insights. It even allows structuring agendas for sales leaders focused on results and co-creating business plans with distributors directly from Salesforce. AI serves not only your customers but your daily operations as well.

Cloudgaia, your trusted partner



1,000+
CERTIFICATIONS



With deep multicloud and industry expertise, multilingual global teams, and a proven track record with leading Consumer Goods, Retail, and Manufacturing companies, we maximize business value through AI and innovation. We approach each customer with a big vision, focusing on their clients and sustainable business growth. We deliver fast, approachable solutions that maximize their investment through Salesforce.

You can focus on growth while we handle the rest.

Consulting Team ready for the latest Extended Model Capabilities

- Seamless omnichannel transitions between digital and physical touchpoints driven by AI.
- Order and Product Management improving customer satisfaction and retention.
- Field Sales and Retail Execution with Offline Capabilities. AI for route optimization and capture of store visit data.
- AI-driven customer insights and Automated recommendations.
- Trade Promotion Management for ROI Optimization.

Why we should partner?



50+

Transformative Consumer Goods projects over **8+ years** of experience in the industry.



TOP 10

Expert in Consumer Goods in Salesforce **AppExchange**.



Key Salesforce expertise



Consumer Goods



Customer 360°



4.8/5

CSAT Customer Satisfaction

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Ready to transform your business?

Let's talk!

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