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Featured Application

Agent-Led Customer Success: How Salesforce Built a Unified Agentic Strategy That Works for Everyone

Innovation and Creativity: Helping Every Customer, Right Where They Are

For years, enterprise support ran on a reactive model: a customer encounters a problem, submits a ticket, and waits. Even as automation improved, rigid, scripted flows couldn't handle real complexity. At Salesforce, case volume was growing 20% year over year, an unsustainable trajectory threatening both customer experience and cost structure. It was time to rethink our support experience entirely.

We launched Help Agent in four weeks to solve for our highest-volume case drivers, our most asked questions, and answered them quickly so customers could get back to their day. We proved it worked, then expanded continuously: adding more topics, more surfaces, and now seven languages, without sacrificing quality. To date, Help Agent has had more than 4.5 million conversations with customers, delivering trusted answers instantly, 24/7. And when a customer wants a human, we make that happen just as seamlessly.



But the bigger innovation is what Help Agent has become beyond support. It now guides customers through onboarding, helps them set goals, and surfaces proactive guidance based on telemetry health data, telling customers about features they are already paying for but have not yet used. This is customer lifecycle success delivered through an agent: not just answering questions, but actively helping every customer get more value from Salesforce. Help Agent also supports the renewal journey, putting customers in the driver's seat: contract questions answered instantly, insights surfaced on demand, and a direct connection to a Renewal Manager when they are ready. No waiting or searching. Just clarity.

We built Help Agent to meet customers wherever they are: Salesforce Help, Slack, Informatica, our 1-800 support line, and now inside Salesforce itself. The same agentic thinking extends to our teams serving them. Support Engineers resolve cases faster with relevant context surfaced before they engage. Customer Success Managers no longer spend hours digging through account data: it is served to them with recommendations based on both expertise and real-time signals. When customers interact with a Salesforce team member, that person already knows what they need. The Engagement Agent extends this motion to growth: identifying customers who have shown interest and proactively reaching out before they realize they need us, turning early signals into meaningful conversations and keeping growth moving forward, even when teams are offline.

Impact and Results: The Results Customers Feel

4.5M+ customer conversations to date, 24/7, in seven languages.

68% Self-Serve Resolution Rate, up from 40% at launch, with a defined path to 80%.

80% Customer-Confirmed Resolution Rate: customers explicitly confirming their issue was resolved, a higher standard than inferred resolution alone.

5% abandonment rate, down from 29% at launch: customers who once walked away now stay and get what they need.

4.6 / 5 CSAT, improving throughout the transition and surpassing pre-Agentforce benchmarks.

170,000 fewer cases year over year: customers getting help immediately instead of entering a queue – a complete reversal of a 20% annual case growth trend.

22% faster case creation for customers who need to escalate, a direct result of customer feedback shaping the product.

16% faster case resolution (Total Time to Resolution) for Standard Success Plan customers who need human assistance, year over year. These are the customers who historically waited longest for help. That gap is closing.

4.76 / 5 usefulness rating in a formal customer research study, with every respondent rating Help Agent useful or extremely useful.

Customer-Centric Approach: Every Customer Feels Known

Help Agent levels the playing field: Salesforce customers without a dedicated Customer Success Manager now get the same expert, personalized guidance as those who do. Help Agent proactively surfaces guidance on features customers are already paying for but have not yet adopted. It supports goal-setting directly within the experience, so every subsequent interaction becomes more contextual and more relevant to what that customer is actually trying to achieve. For Premier and Signature Success Plan customers, Help Agent carries full conversation context forward to their Onboarding Guide. Their team is ready from the first interaction, no repetition required.

Being customer-centric also means being willing to get it wrong, listening to customer feedback and fixing it fast. When data showed only 1.7% of customers used the search bar, we removed it. Customers gave us feedback that the agent could not fulfill key search use cases they needed. We listened, responded directly in IdeaExchange, and brought it back faster than most thought was possible. We are now working with our product teams to bring that missing functionality directly into the agent so our Agentforce customers can benefit as well.

Case creation followed the same pattern: We drew on what we knew about each customer to pre-fill context and streamline the experience. The result: Filing a case became 22% faster than the previous form. But customers told us they missed the familiar format. So we listened and brought it back, embedding a case form directly into the conversational UI. Innovation and familiarity, side-by-side.



> **Having a conversational AI like this would have given me a direct setup roadmap much faster.**
>
> Customer research participant,
> Salesforce onboarding study

Execution and Implementation: Easy and Expert, Built to Keep Getting Better

Every decision maps back to a simple formula: Easy and Expert. Easy means intuitive, accessible, always on, zero wait time. Expert means trusted guidance grounded in 27 years of CRM knowledge – and shaped by the specific goals, implementation health data, and context of each individual customer. We know our customers, and we want every interaction to reflect that.

We iterate on two-week release cycles, continuously analyzing performance and shipping improvements. We run synthetic utterance testing against acceptance criteria before every release, and full observability monitoring after release. User feedback from IdeaExchange, research studies, social media, and CSAT feeds directly into what we prioritize next.

Our continuous improvement cadence is reflected in the results: Following our March 2026 experience upgrade, CSAT increased 14% and has continued climbing, a direct signal that the changes we are making based on customer feedback are landing.

And the impact of that work is already being felt. Customers are getting answers in minutes instead of days, in seven languages, across every surface we operate on. The result: 170,000 fewer tickets filed. A CSAT of 4.6 that improved throughout the entire transition to agentic service. A Customer-Confirmed Resolution rate of 80%. This is what autonomous operations look like when efficiency is measured by what customers gain, not just what the business saves. We started with a simple conviction: every customer deserves expert help, whenever they need it. Today, 4.5 million conversations later, that conviction is reality. And as customer demands evolve, the investment we have made in Help Agent travels with them, across every surface, whenever they need it. This is what agentic service looks like when it is built around the customer first. And we are just getting started.


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