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DIGITAL

The agentic AI advantage

How Salesforce and TTEC Digital are shaping
the next era of human-centered service

Executive summary

Customer experience is changing faster than organizations can adapt.

AI is maturing, data is becoming more accessible, and Salesforce is accelerating its vision for an agentic enterprise that blends human insight with machine speed.

Yet many organizations face the same foundational challenges. Data is fragmented. Workflows feel disconnected. Talent is stretched. Pilots do not scale.

We created this eBook to provide clarity. The guidance in these pages reflects the perspective we bring to clients across industries, grounded in over forty years of operating and transforming large-scale contact centers.

Our goal is to help leaders cut through noise and focus on practical steps that improve customer experience, strengthen workforce performance and unlock measurable outcomes.

We believe this is a defining moment. AI is everywhere, but value does not come from tools alone. It comes from purposefully connecting systems, data, and people so they operate as a unified experience engine.

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The shape of CX

AI is now a, if not *the*, central force shaping customer engagement, employee experience and operational performance. Most organizations no longer ask whether they should use AI. They ask how to adopt it responsibly, measurably and in ways their teams can absorb.

The opportunity goes beyond adding intelligent features to existing systems. It's about rethinking how information moves through the enterprise as a whole. It's about redefining how human teams and intelligent agents collaborate. And most importantly, it's about creating experiences that feel fluid because the underlying data and workflows that deliver them are.

At TTEC Digital, we see several forces redefining customer experience in 2026 and beyond:
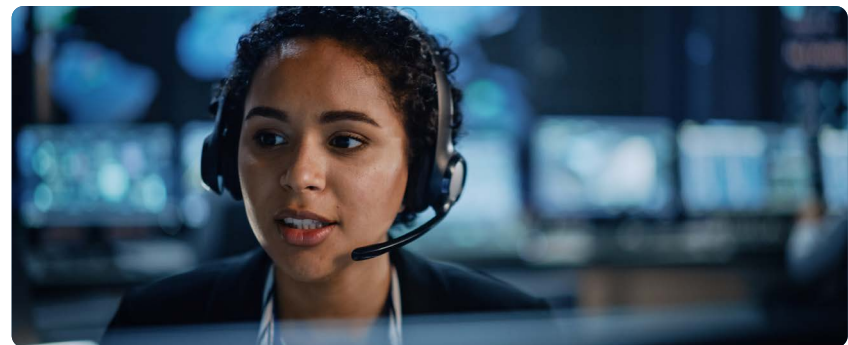
- Consumers expect faster, more contextual interactions.
- Service operations are strained by complexity.
- Customer data sits in more systems than ever.
- Agents face rising cognitive load.
- Leaders want outcomes, not experiments.

Human + AI agents working together

Across every shift in customer experience, one pattern is becoming clear. The future of CX is not human or AI. It is human agents and AI agents, working together.

Intelligent agents handle repeatable tasks like classification, retrieval, and summarization. Humans focus on judgment, empathy, and problem-solving. When designed well, this shared model reduces friction for customers and cognitive load for employees.

This human + AI operating model underpins what we consider the most sustainable approach to CX and to growth — and shapes how organizations can rethink the agentic enterprise, address the identity crisis, modernize service and mature their operating model.

The ecosystem

What we are hearing from the market

Leaders in every industry are all facing the same headaches: AI is moving fast and raising the bar, good talent is hard to find, customers don't want to wait for anything, and old-school systems keep getting in the way of going digital.

These themes surface consistently across our strategy, consulting, and business process outsourcing (BPO) work.

01 AI adoption is uneven across the enterprise.

Marketing experiments with content generation. IT invests in data activation. Service teams seek efficiency gains. Yet many organizations lack a unified roadmap for how AI will work across functions.

02 Customer expectations continue to outpace enterprise capabilities.

Customers do not want more channels. They want clarity. They want fast resolution. They expect to be recognized across conversations. This requires connected data, not just conversational interfaces.

03 Leaders want real outcomes instead of endless pilots.

Many organizations spent 2023 and 2024 experimenting. Few efforts reached production. Leaders now prioritize use cases that create measurable business value and improve employee experience.

04 Workforce pressure is intensifying.

Agents juggle more systems, more personalization demands, and more complex cases. AI is now essential for reducing administrative load so humans can focus on higher-value work.

Salesforce's latest roadmap reflects these realities. Their solutions increasingly center on enabling human efficiency, orchestrating intelligent workflows, and strengthening context across the customer journey.

The agentic enterprise

Navigating a crowded landscape

The term "agentic enterprise" has entered the industry vocabulary, but definitions vary widely. Vendors use similar language for tools with very different capabilities, leaving leaders unsure how to compare the flood of solutions.

We define the agentic enterprise simply. It is an organization where AI agents, automated systems, and human teams work together through coordinated, context-aware workflows. These agents retrieve data, take action, escalate intelligently, and support human judgment.

Why the landscape feels noisy

- Tools labeled "agents" differ dramatically in sophistication
- Solutions operate without a shared customer context
- Data quality challenges limit value
- Workflows remain siloed
- Teams lack a shared definition of success

TTEC Digital sees clients fall into two traps:

Trap 1: **Tool chasing**

Teams buy the latest AI features without ensuring their data, workflows or users are ready for them.

Trap 2: **Endless experimentation**

Teams run pilot after pilot without a strategy for how to scale or measure success.

The solution is alignment. AI becomes far more powerful when organizations establish foundations first and adopt tools that enhance the skillsets of their employees.

The agentic identity crisis

Fixing the Customer 360 gap

Across industries, leaders tell us the same thing: consumers now expect fast, transparent, personalized interactions that follow them across channels. Personal use of AI has reshaped these expectations by making instant answers, tailored recommendations, and seamless handoffs feel normal.

Yet many enterprises cannot keep up. We call this the **agentic identity crisis.**

At home, AI feels effortless. People ask a question and get a clear answer. They refine it, add context, and move on. When they interact with a brand, the experience often breaks down. Customers are asked to repeat information the company should already know. Bots give generic responses. Context is lost when conversations move from chat to voice or from self service to an agent. What feels seamless at home feels fragmented in the enterprise.

At the root of this breakdown is a Customer 360 gap — the disconnect between what an organization knows about its customers and what its systems and AI can actually use in real time.

Why the crisis exists

01 Fragmented data

Customer information lives in dozens of systems. Interactions move faster than integrations.

02 Inconsistent interfaces

Agents toggle across tabs. Bots have different knowledge than humans. Voice experiences lag behind digital ones.

03 Multiple versions of the truth

Marketing, service, and operations rarely share a single source of customer context.

04 Legacy automation

Many organizations rely on rule-based workflows that cannot adapt to new data or new behaviors.

The result is friction. Customers feel unheard, employees feel constrained, and, overall, AI fails to deliver on the expectations it helped create.

How Salesforce is helping close the gap

Recent Salesforce announcements reflect a shift toward unified intelligence, not scattered features.

Intelligent Context

Data Cloud strengthens the foundation for real time, harmonized customer profiles so agents and AI access the same governed context.

Agentforce Vibes

A contextual coding partner that understands an organization's schema and configuration. It accelerates delivery while staying inside the Salesforce Trust Layer.

Reasoning across unstructured data

New capabilities allow agents to interpret PDFs, tables, images, and other complex formats so AI actions remain grounded in complete context.

Agentforce 360

A unified platform that brings together data, governance, actions, and task-oriented agents. It supports the shift from basic automation to reliable autonomous work.

And yet, fixing the Customer 360 gap takes more than new Salesforce tools. It takes more than connected systems. It requires clean, shared information and experiences built around context, not channels.

This is where the CX maturity curve matters. It gives leaders a clear view of where they are today, what is missing, and what must evolve to support coordinated human and agent workflows.

The path to a connected, agentic enterprise

CX maturity is ultimately about connection. Are we engaging customers in the right channels? Can we personalize based on real history? Are service channels integrated so information flows without friction? And can AI use that data to guide the next best actions, not just next steps?

Salesforce's advancements make more possible than ever, but the real promise comes from pairing new capabilities with smarter use of existing systems and data. The tools open the door; connected data and clear workflows unlock the value.

CX Maturity Curve

C360 FOUNDATION
Connect data

C360 EXPANSION
Personalize journeys

C360 AUTOMATION
Automate workflows

C360 INTELLIGENCE
Activate insights

Key milestones
- Bring core customer data together
- Create a shared customer view across systems
- Connect service channels

Key milestones
- Build customer profiles shared across departments
- Use customer data to route and greet customers
- Show the most relevant knowledge for each customer

Key milestones
- Automatically classify and route interactions
- Guide agents through connected workflows
- Resolve common issues through self service

Key milestones
- Recommend the next best action in real time
- Understand customer sentiment as interactions happen
- Use insights to personalize offers and guidance

Key metrics
- ↓ AHT from faster data access
- ↑ FCR from unified context

Key metrics
- ↑ CSAT from personalized interactions
- ↑ NPS from orchestrated journeys
- ↑ Customer retention

Key metrics
- ↑ Self-service rates
- ↓ Average cost per service interaction
- ↓ CES from reduced effort information

Key metrics
- ↑ Agent productivity
- ↑ Customer lifetime value
- ↓ Customer churn
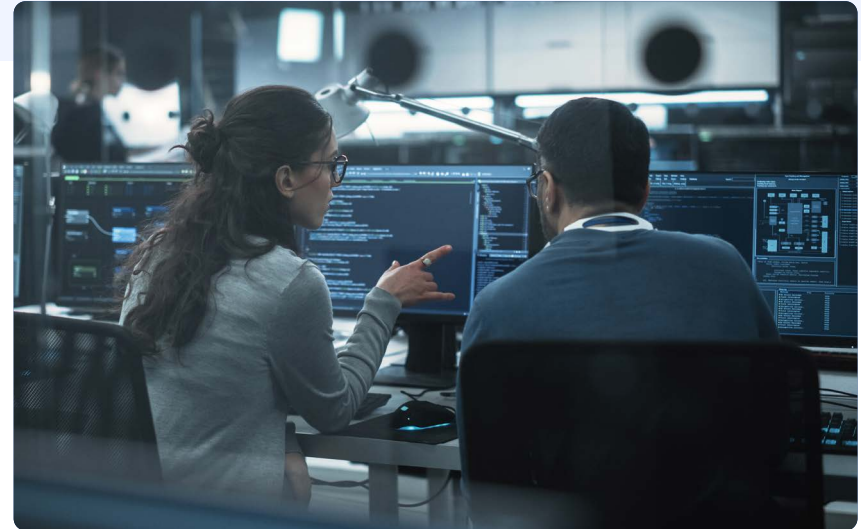
Enabling scalable AI

It's a challenge we see across industries. As AI initiatives multiply, many leaders struggle to turn experimentation into value. Pilots stall, teams lose momentum, and investment priorities remain unclear.

This is where the CX maturity curve becomes useful. It helps leaders understand where they are today and what must be in place to move forward with confidence.

Scaling AI requires structure, not more experimentation. It comes down to rethinking how work gets done across data, workflows and roles.

AI amplifies whatever structure already exists. Clarity accelerates value. Broken processes amplify friction.

This is the operating model shift at the heart of the agentic enterprise.

"All the ways that organizations are able to consume their own data and surface it in real time are helping reduce churn and increase customer lifetime value. Nothing should look in the rearview mirror. Everything is moving toward a more proactive, forward-looking model."

Katie Luby
Strategic Engagement Lead, Salesforce Practice, TTEC Digital

Building agentic readiness

AI only works when it is grounded in strong foundations. Salesforce's Data Cloud, Agentforce, and unified engagement layer create powerful opportunities, but readiness determines whether those capabilities scale.

We see three foundational layers that define agentic readiness:

01

Data readiness

Organizations need clean, connected and governed customer data. Data Cloud unifies information from across the enterprise so humans and AI operate from the same trusted context.

02

Orchestration readiness

Modern CX depends on coordinated decision-making across agents, bots, APIs, and workflows. Intelligent orchestration ensures systems work together rather than in parallel silos.

03

Human readiness

As AI becomes embedded in daily workflows, roles evolve. Human agents focus on problem-solving and judgment. Supervisors shift from reactive oversight to proactive coaching. Leaders gain visibility into performance and outcomes, not just activity.

The four **Rs** of workforce evolution

As organizations move up the CX maturity curve, the workforce must evolve alongside the technology.

Salesforce's four Rs framework offers a practical way to understand how roles, skills and workflows change as AI becomes part of daily operations.

This is not a future-state exercise. These shifts are already underway in service organizations adopting agentic capabilities.

Together, **these four shifts** reflect a broader truth. Workforce design and operating model design must move together. Technology only scales when people understand their evolving roles and have the skills to succeed within them.

01

Redesign

Workflows must be reimagined around where human judgment adds value and where intelligent agents can accelerate work. AI can support authentication, issue capture, classification, and root cause analysis. Humans step in where nuance, context, and decision-making matter most. The result is faster resolution without sacrificing quality.

02

Reskill

As routine tasks are automated, human skills become more important, not less. Organizations invest in empathy, emotional intelligence, and scenario-based training so agents are prepared for escalations, complex cases, and sensitive interactions. These are the moments that define trust.

03

Redeploy

AI creates capacity. High-performing organizations use that capacity intentionally. Human agents have room to move into more specialized, higher-value roles such as technical troubleshooting, compliance guidance, customer retention strategy and peer coaching. Career paths expand instead of narrowing.

04

Rebalance

The final shift is defining how work is shared. AI handles repeatable, high-volume tasks. People focus on interpretation, relationship-building, and problem-solving. The balance is deliberate and continuously refined as capabilities mature.

Service fueled

Why service is primed for transformation

Service has always been the heartbeat of customer experience. It is where expectations rise fastest and satisfaction can fall the quickest. It is also where inefficiencies surface early and workforce strain is most visible. Naturally, it has become the proving ground for enterprise AI.

TTEC Digital's heritage in service and BPO operations gives us a unique lens. We know how complexity, training variability, and high case volume stretch service teams. And we have seen that AI is not simply an efficiency lever, but also an experience one — improving the accuracy, consistency, and emotional quality of customer interactions.

Three forces accelerating AI adoption in service

Rising complexity

Agents navigate more systems, channels, and case types than ever before. AI reduces cognitive load by classifying, retrieving and summarizing information.

Demand for instant answers

Customers expect immediate resolution across every channel. AI improves self-service and accelerates escalations by surfacing context automatically.

Direct connection to revenue

Service directly influences loyalty, churn, and conversion. AI eliminates bottlenecks and standardizes quality to deliver outcomes that protect and grow customer value.

Salesforce service-focused use cases

Transforming customer service with AI

With 12,000+ customers, Salesforce's Agentforce 360 has delivered transformative results, particularly within customer service.

Adecco

Adecco **handled 51% of candidate conversations** outside of standard working hours with agents.

"Agentforce lets us automate high-volume tasks, strategically freeing our recruiters' time to focus on quality customer engagement."
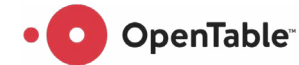**Pierre Matuchet,** *SVP IT & Digital Transformation, Adecoo*

OpenTable

OpenTable **resolved 70%** of diner and restaurant **inquiries** autonomously.

"Within weeks, our restaurant agent handled 70% of questions, a marked improvement over our previous chatbot."
George Pokorny, *SVP of Global Customer Success, OpenTable*

reddit

Reddit **deflected 46% of support cases** and cut resolution times by 84%, reducing average response time from 8.9 minutes to 1.4 minutes.

"This efficiency lets us provide on-demand help for complex tasks and boost advertiser satisfaction by 20%."
John Thompson, *VP of Sales Strategy and Operations, Reddit*

1-800 ACCOUNTANT

1-800Accountant achieved a **90% case deflection** rate during tax season.

"Agentforce lets us give customers real-time updates, flag savings, and arm our pros with pre-built agendas."
Ryan Teeples, *CTO, 1-800Accountant*

How to drive impact

Turning agentic strategy into operational value

Most organizations do not struggle with vision. They struggle with execution. At TTEC Digital, we focus on three principles that help organizations move from experimentation to sustained value.

01

Design for people, process, and technology together

Agentic success does not come from optimizing one layer in isolation. We evaluate the full experience ecosystem, including:

- Employee experience
- Customer experience
- Workflow friction
- Available data and intelligence signals
- Automation readiness
- Supervisory enablement

Salesforce capabilities are powerful. They deliver the most value when they are aligned to how work actually happens across the organization.

02

Move from pilots to production with intention

Experimentation is vital. Endless experimentation is most definitely not.

Organizations need safe ways to test agentic use cases with a clear path to scale. This includes defining success upfront, preserving context and designing workflows that can mature over time.

TTEC Digital's [SandcastleCX](#) program allows teams to test multi-agent orchestration, new workflow patterns and supervisory insights without destabilizing operations. Every pilot is built with production in mind.

03

Operationalize intelligence where work happens

Agentic maturity shows up in everyday service moments. Even with strong data and AI, many teams rely on reactive oversight — reviewing dashboards after the fact and coaching agents once context has faded.

To close this "last mile of service intelligence" gap, supervision must become agentic: performance signals need to surface in real time, context must be captured automatically, and guidance should be delivered during, not after, the flow of work. Solutions like TTEC Digital's Saige accelerate this shift by equipping supervisors with timely, contextual support, enabling quicker corrections, stronger trust, and more consistent performance.

Proof points

Real TTEC Digital + Salesforce outcomes across industries

Following our three principles, we've been able to achieve measurable outcomes for clients, including:

Healthcare giant replaces legacy CRM

Luxury brand delivers concierge-level service

Global automotive leader improves customer loyalty

CHALLENGE

One of the largest healthcare providers and payors in the U.S. needed a modern platform to meet rising customer expectations. Their legacy CRM slowed agents and limited visibility across lines of business.

CHALLENGE

A top ranked global luxury retailer required deeper personalization and operational efficiency. Their existing system limited visibility into customer profiles, inventory, and order data.

CHALLENGE

A leading automotive OEM needed to modernize consumer affairs, unify support channels, and create a more connected service experience.

SOLUTION

Cisco Webex Cloud Contact Center integrated with Salesforce Service Cloud Agent Desktop

SOLUTION

Migrated from Zendesk to Salesforce Service Cloud. Integrated inventory, product, and order data. Enabled Salesforce Voice with Genesys CX Cloud.

SOLUTION

Integrated Salesforce Service Cloud with legacy systems through MuleSoft. Enabled CTI, IVR, email and service chat in a unified experience.

RESULTS

↓ **66% reduction** in agent ramp time

↑ **12% increase** in conversion rate

↑ **10% CSAT increase** within six months

RESULTS

↓ **10% decrease** in average handle time

↑ **10% increase** in NPS

RESULTS

↓ **15% decrease** in average handle time

↑ **20% increase** in NPS

What comes next for CX

Built on data, driven by people

Customer experience is entering a new phase.

AI will keep advancing. Expectations will keep rising. But progress will not come from technology alone. It will come from how intentionally organizations bring data, workflows, and people together.

The agentic future depends on harmonized data, purposeful interactions, and outcome-driven use of AI. It depends on moving beyond experimentation and designing experiences that work in the real world, at scale.

This is where clarity matters. And where platforms like Salesforce play a critical role. Clear data foundations. Clear ownership across systems. Clear roles for humans and intelligent agents. When those elements align, AI becomes something teams can actually use, trust, and build on.

AI is not replacing human teams. It is reshaping how work gets done and raising the standard for every interaction.

At TTEC Digital, our perspective is shaped by decades spent shaping the moments that matter. We have supported agents, operated contact centers, and implemented the technologies that power modern customer experience. Our Salesforce practice brings that operational reality into every engagement, helping organizations turn agentic ambition into measurable progress.

The future of CX is not human or AI. It's human and AI, working together, with intention.

Ready to take the next step?

If you're exploring how agentic capabilities fit into your Salesforce ecosystem, we're here to help. Let's start with your data, your workflows, and the outcomes that matter most, and build a clear path forward from there.

Start your agentic readiness journey

[Get started]

https://ttecd.co/SFDC