



Agentforce for life sciences: 10 keys to unlocking AI-powered automation with Salesforce

By Noaman Khan, Pavan Reddivari and Gaurav Ghiya



PARTNER

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Salesforce, the industry standard for customer relationship management (CRM), is shaking things up in life sciences. With a suite of tailored solutions, they're empowering innovators to reach new heights of efficiency, innovation and customer experience.

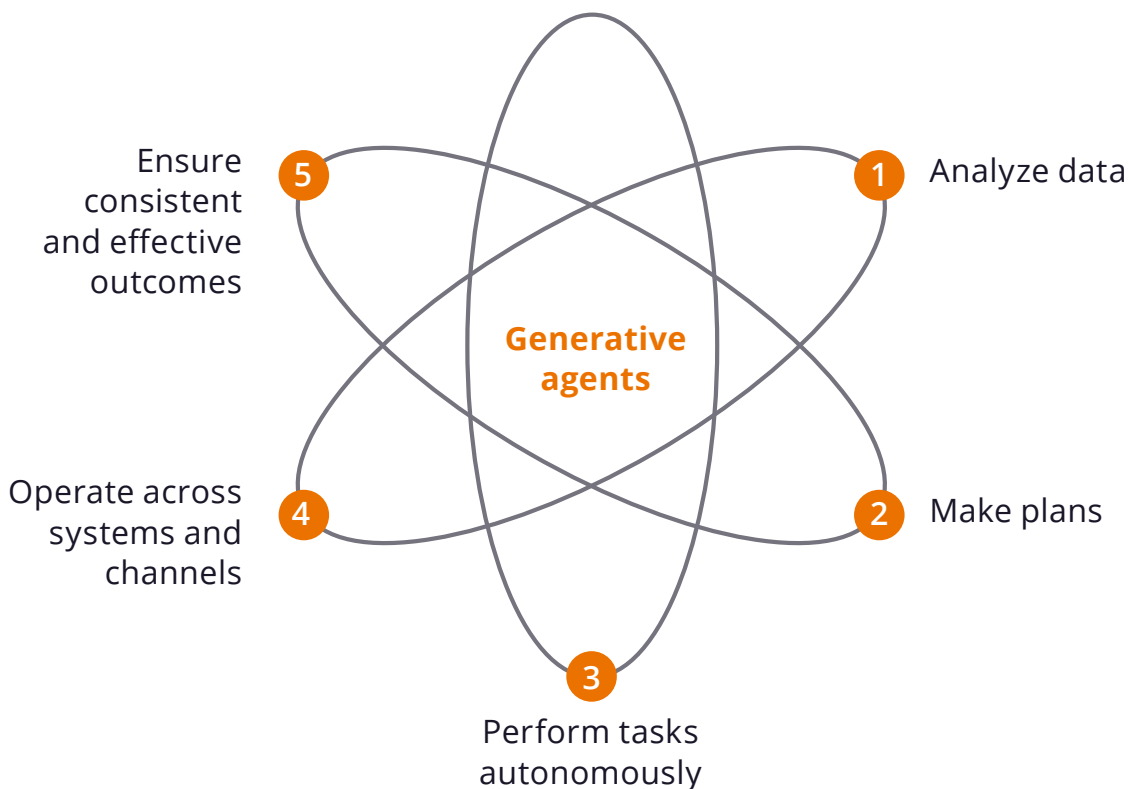
Recently, Salesforce introduced Agentforce, a powerful set of generative AI capabilities within its Einstein platform. It's being billed as part of the "Third Wave of AI," moving beyond traditional chatbots and co-pilots toward highly autonomous agents capable of executing complex tasks with minimal human oversight.

Featuring a suite of prebuilt agents and custom actions, Agentforce can work across sales, service, marketing and commerce functions to enhance overall productivity.

The agents that come out-of-the-box in Agentforce are versatile problem-solvers, helping your teams deploy ready-to-use workflow automations and perform tasks unique to your business. A network of autonomous agents from other partners is also available to extend your capabilities. By design, agents can operate seamlessly across systems and channels—both within and beyond the Salesforce ecosystem.

FIGURE 1:

Agents are versatile problem-solvers



Intelligent and responsive sales, service and marketing workflows

Salesforce's prebuilt agents infuse intelligence and responsiveness into legacy business processes and systems.

On the sales front, Salesforce offers a Sales Development Representative (SDR) Agent, which effectively nurtures the sales pipeline around the clock. The SDR Agent can autonomously engage inbound leads, automate outreach and prospecting, qualify leads, send introductory emails, address inquiries, manage objections and schedule meetings.

The Sales Coach Agent plays the role of a personalized coach, allowing sales representatives to practice pitching, handle objections and negotiate with realistic scenarios tailored to each deal.

For service, the Service Agent can support customers autonomously across multiple channels, providing 24/7 responses to customer inquiries in natural language.

Similarly, on the marketing front, capabilities like the Campaign Agent assist marketers in building better campaigns faster by generating campaign briefs, targeting audience segments, creating content and building customer journeys in Flow Builder.

Each of these agents has a multitude of configuration and customization options, which can be combined with Salesforce Data Cloud to automate and redefine a plethora of B2B and B2C use cases.

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High-potential use cases for life sciences

In life sciences, where Salesforce is also investing in standing up the Life Sciences Cloud, Agentforce is positioned to bring new levels of automation to many different areas across pharma's commercial, medical and patient services functions.

The following sections outline some high-potential use cases ZS's clients are already exploring, leveraging the combination of existing agents in Agentforce, Salesforce Data Cloud, partner agents or custom-built agents.

FIGURE 2:

Commercial use cases

Agentic workflows can make HCP engagement more intelligent—and much more personalized

Use case category	What agentic workflows can do	Impact
Personalized HCP engagement	Tailor communication based on HCP preferences, including prescribing history, specialty, past call notes, approved content shared, events participation, sales analytics and more.	Improves HCP relationships and increases prescribing potential
Call planning and targeting	Automate call planning and targeting to identify high-value HCPs based on sales segments, sales trends, past prescribing behaviors, patient demographics and past interaction history.	Improves targeting accuracy and boosts effectiveness and productivity
Call coaching and real-time guidance	Provide real-time insights to reps, including competitor activity, new drug launches and clinical data. Coaching can help reps prepare for calls and get real-time feedback based on HCP specialty, prescribing behavior, past interactions, key messages, sentiment analysis and more.	Enhances rep skills, boosts call quality and supports continuous learning
Post-visit summaries and follow-ups	Transcribe and summarize sales calls and meetings, highlighting key discussion points, and automatically generate meeting notes and action items.	Saves time, improves leadership visibility, and ensures consistent compliance and follow-ups
Intelligent meeting scheduling and route optimization	Automate meeting schedules according to optimized routes, availability and compliance with HCP interaction limits. Suggest the most efficient travel routes and schedules to maximize HCP visit coverage.	Improves territory management through reduced travel, improved compliance rates and productivity
Next best action recommendations	Analyze HCP engagement data, prescribing behaviors and preferences to suggest optimal actions for sales reps, such as the best times to contact HCPs, preferred communication channels and relevant content to share.	Enhances engagement effectiveness, leading to improved HCP relationships and prescription rates
Automation for sample requests	Automate the processing of sample requests from HCPs and healthcare organizations, including verifying compliance guidelines and checking inventory availability.	Shortens approval and distribution cycles
Event management support	Automate outreach, registrations and follow-ups for webinars, speaker programs, workshops and conferences.	Reduces manual coordination and raises attendance and engagement rates

Content creation assistance	Generate compliant and personalized content for HCP outreach, such as emails, newsletters and educational materials, by analyzing existing knowledge bases and integrating data from various systems.	Reduces time spent on content creation and ensures alignment with campaign goals
Campaign execution automation	Automate routine campaign execution tasks such as email delivery, social media posts and event invitations based on predefined triggers or HCP behaviors.	Reduces manual effort, ensuring timely and efficient campaign execution
A/B testing optimization	Generate compliant content variations for specific HCP audiences. Dynamically allocate test groups across multiple channels (email, SMS) and track key metrics (open rates, click-through rates) to identify trends. Optimize future campaigns based on identified trends.	Improves campaign performance by optimizing messaging

FIGURE 3:

Medical use cases

Automation streamlines how HCPs stay informed and revolutionizes how companies engage key opinion leaders

Use case category	What agentic workflows can do	Impact
Medical information dissemination	Automate tracking of medical information requests, ensuring quick and accurate responses to HCP queries combined with crafting technical and scientific documents, scientific reports, lay summaries and day-to-day communications with internal and external stakeholders.	Improves medical communication
Key opinion leader (KOL) identification and profiling	Collects data on potential KOLs, uses natural language processing to assess expertise and influence, and creates profiles to identify and forecast top KOLs aligned with company objectives.	Streamlines KOL identification, targets relevant experts, and saves time
KOL network analysis	Analyzes KOL relationships to assess network influence, assigns influence scores, forecasts emerging KOLs and generates reports to provide actionable insights for strategic planning.	Identifies the most influential KOLs in a subject area, region or other attribute

FIGURE 4:

Patient engagement use cases

Agentic workflows for patient engagement can improve access, personalize education and offer patients greater convenience

Use case category	What agentic workflows can do	Impact
Personalized patient engagement	Analyze patient profiles to send personalized messages, reminders and care instructions based on medical history and preferences. These can include wellness tips, updates on treatment plans or relevant health campaigns delivered via preferred channels like email, SMS or patient portals.	Improves patient satisfaction, fosters loyalty and ensures timely communication for better engagement
Automated appointment scheduling	Manage the end-to-end appointment life cycle, including booking, reminders, rescheduling and cancellations. Agents can also optimize schedules for clinics based on availability and patient proximity, ensuring minimal waiting times.	Reduces administrative workload, enhances patient convenience and increases appointment adherence rates
Medication adherence monitoring	Monitor patient prescription patterns, send reminders for medication intake, flag missed doses and educate patients on the importance of adherence. Agents can also coordinate prescription refills and offer support for side-effect management through virtual assistance.	Improves adherence to treatment regimens, reduces hospitalization risks and enhances overall health outcomes
Virtual health assistance	Offer 24/7 support for common inquiries such as treatment details, insurance coverage or managing chronic conditions. Agents can guide patients through using digital tools, finding nearby facilities or escalating to live representatives when complex queries arise.	Enhances patient support accessibility, reduces wait times and allows healthcare teams to focus on critical cases
Patient education delivery	Curates personalized educational content based on a patient's diagnosis, treatment plan and learning preferences. Agents can deliver materials such as videos, infographics or interactive guides through patient portals, emails or mobile apps, ensuring that content is easily accessible and comprehensible.	Empowers patients with actionable knowledge, improves health literacy and fosters active participation in care
Financial assistance navigation	Assess eligibility for financial aid programs, provide step-by-step guidance on applications, track progress and send updates or reminders. They can also suggest cost-effective alternatives for treatment or connect patients with pharmaceutical assistance programs.	Reduces financial stress, improves access to therapies and enhances patient satisfaction with the support system

Automated benefits verification	Automatically verify patient insurance coverage in real time by connecting with payer databases and EHR systems. Agents extract and validate details such as policy terms, coverage limits and copayment requirements for specific medications or treatments.	Streamlines insurance verification, reduces errors and improves patient satisfaction
Streamlined prior authorization (PA)	Prefill PA forms with patient data, reducing manual entry and ensuring compliance with payer-specific requirements. Agents can integrate with payer systems to submit required documentation, track submission status, send alerts for pending approvals and escalate delays to appropriate channels.	Streamlines PA processing, improves approval rates and accelerates treatment initiation

Why Agentforce stands out as a transformative tool

Agentforce stands out as a compelling solution for business teams seeking scalability and user-friendliness. [Salesforce Ben](#) has already written about misconceptions of its features in detail. We'll briefly summarize some of those points here. And we'll add the importance of Agentforce's "bring your own large language model" (BYO LLM) capability and its low-code / no-code setup to the list.

Here's what you need to know:

Agentforce does things that chatbots can't: Basic chatbots can't interpret and respond to natural language, trigger actions and extract relevant field values from prompts like Agentforce does. Salesforce achieves this through the [Atlas Reasoning Engine](#), which identifies topics, parses natural language inputs, and converts them into a JSON format. JSON can be used to execute workflows like launching Flows, Apex scripts or prompt templates within Salesforce, enabling seamless task automation.

More power with Salesforce Data Cloud: You can activate and use Agentforce with or without Data Cloud, but without it, agents will have limited access to data and insights.

You'll gain more by pairing Agentforce with Data Cloud because it will give agents access to consolidated external data, unified profiles, calculated insights and attributes from related data management objects stored in the cloud. Additionally, Data Cloud integrations will allow PDFs and emails to be available for retrieval-augmented generation (RAG). Agents can be effectively grounded using Salesforce records, metadata, CMS files, documents, knowledge articles and context from conversations.

Integrating external data: Integrating data into Salesforce hasn't always been feasible due to factors like data residency concerns, ingestion costs or vendor lock-in risks. Agentforce provides a workaround through Flow Builder. Without coding expertise, you can configure and autolaunch a Flow to perform an HTTP callout to external systems. This allows AI agents to access external data via API calls, ensuring that Agentforce can access external data without replicating it within Salesforce.

Simplified low code / no code set-up: Agentforce offers a simple and intuitive interface to rapidly configure its out-of-the-box agents, tailor conversational agents and deploy embedded AI apps using low-code tools. All you need is a clear understanding of the business process and the user persona or role that the agent will play to configure topics, instructions and associated actions. Prompt Builder, the intelligence layer for Agentforce, harnesses the power of natural language combined with prompt engineering best practices to set up prompts in minutes which are grounded in your Salesforce data.

BYO LLM: Salesforce customers with Einstein 1 Studio already connect Salesforce to externally hosted LLMs leveraging existing agreements with providers like Microsoft, Google, AWS or OpenAI. Once connected and validated, these LLMs can be used with Agentforce's Prompt Builder to create diverse generative AI applications. Prompt Builder also grounds responses on CRM data and integrates with Flows, Apex and other Salesforce functionalities, offering a powerful and flexible framework for generative AI within Salesforce. The BYO LLM and 'bring your own agent' (BYAA) features allow companies to integrate their own or specialized agents—such as those in ZS's [ZAIDYN](#)[®]—for a more targeted and seamless experience.

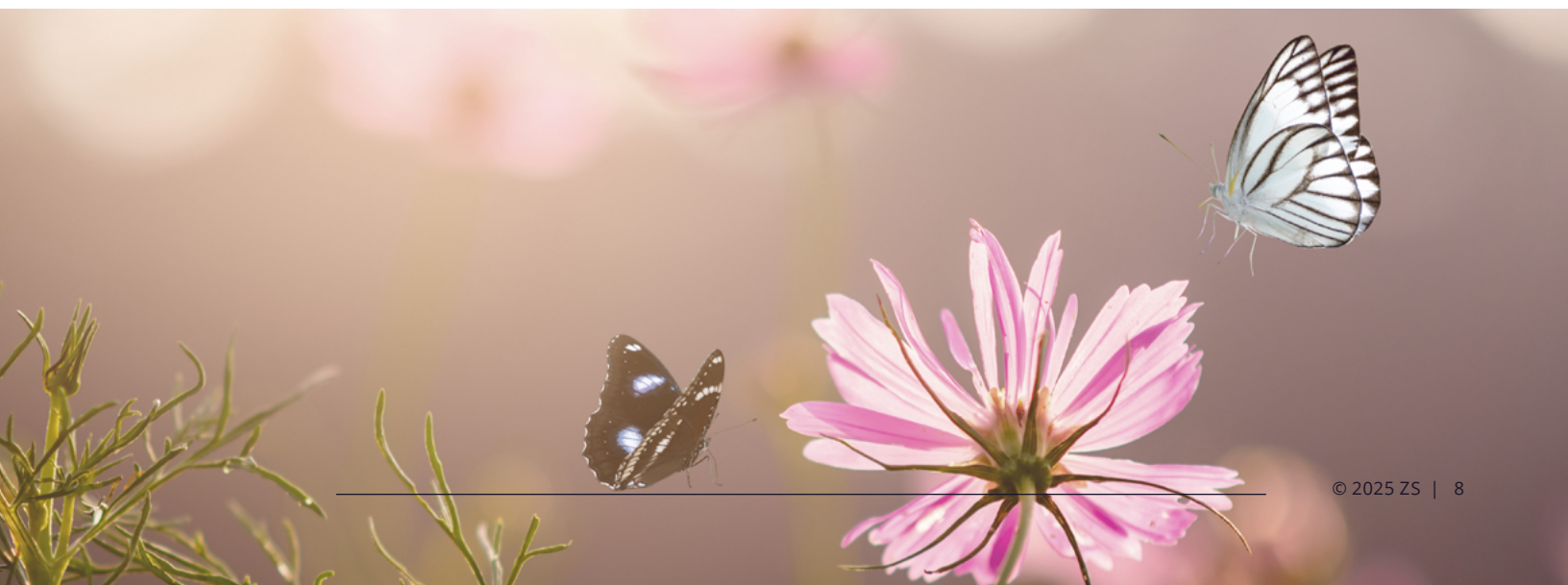
10 keys to unlocking the value of Agentforce in your own organization

While Agentforce has great promise, organizations need a holistic strategy and careful consideration of several elements before diving in.

Many of these are familiar, but it's essential to consider them in the specific context of your commitment to Salesforce and the capabilities of Agentforce:

1. **Business case and expected returns:** To unlock the value of Agentforce, it's crucial that your plan links to overall business goals. Identify specific business goals and KPIs that Agentforce can improve. Prioritize use cases that drive improvement goals to target specific processes, whether they are centrally managed or distributed.
2. **Business processes readiness:** Automating with agents requires reengineering business processes, including setting new objectives and key results. Collaborate with business owners to assess the effort and investment needed to reimagine processes, align them with the platform roadmap and consider the costs of retiring legacy processes and ensuring business continuity.
3. **Alignment with the AI strategy and existing investments:** Most organizations have an established AI strategy, which includes organization-level standard operating procedures and compliance standards, and partnerships with Open AI, Microsoft, Google or others. It's important to evaluate how Agentforce fits into your organization's AI strategy framework and how its capabilities like connecting to externally hosted LLMs can be leveraged.

4. **Evaluate priority use cases against Agentforce maturity:** Assess Agentforce’s ability to deliver results, scale and comply with regulations for your chosen use cases. Pay close attention to the specific roles and tasks the agent will need to perform to achieve consistent outcomes.
5. **Run proof of concepts and pilots:** Set up sandbox environments to test Prompt Builder’s out-of-the-box agents and partner agents for your use cases. Run small-scale pilots with real users to measure performance against current KPIs. This will help build confidence in future investments and inform your CRM development roadmap.
6. **Assess data readiness:** The entire reason to choose Agentforce is that it’s grounded in Salesforce data, however if your Salesforce data isn’t high quality, the agent results will also be suboptimal. Carefully assess your Salesforce data for every chosen use case.
7. **Assess integration readiness:** Altering or automating a business process often requires integration with other enterprise systems. As part of your feasibility steps, check your readiness to build integrations between Salesforce and other enterprise systems like ERP, content management, data platforms and HR systems.
8. **Change management and adoption:** With change in business processes and new platform capabilities, organizations need to consider the change effort including communication planning, training, initiatives to drive adoption, evangelizing success stories with agents and many more.
9. **Regulatory compliance and data privacy:** Many organizations deal with sensitive data such as patient data, which require adherence to regulations like [GDPR](#), [HIPAA](#) and [CCPA](#), so it is critical to evaluate Agentforce’s Trust Layer, its claims for “zero-copy” data and how you’ll maintain audit information in Data Cloud to meet your company’s compliance requirements.
10. **AI and domain expertise:** Many of the above considerations, especially in highly regulated industries, require significant domain expertise in areas such as user persona identification, domain-specific workflows and process reengineering, data assessment, regulatory compliance and AI experience. A Salesforce service partner with proven technical and domain expertise can help define and execute a holistic approach.



Choose the Salesforce partner with top life sciences expertise

Noaman Khan, Principal, Salesforce Global Practice Leader, ZS
noaman.khan@zs.com

Pavan Reddivari, Associate Principal, Salesforce Solutions, ZS
pavan.reddivari@zs.com

Gaurav Ghiya, Salesforce Solutions, ZS
gaurav.ghiya@zs.com

At ZS, we're not just tech experts; we're business accelerators. By blending deep industry knowledge with cutting-edge technology, we'll help you maximize the value of your Salesforce investment.



40+

We have more than 40 years of deep domain expertise in life sciences, providing tailored solutions across clinical, medical, commercial and patient services functions.

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We provide purpose-built, domain-specific assets and accelerators for Salesforce that can be easily deployed and configured for your specific technology and data ecosystem.



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