Note:

The following slides are selected **excerpts from a larger presentation deck**.

Content has been modified and anonymized to preserve confidentiality.

Megan Palmisano.

SHARED OPPORTUNITY

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. **Proin tortor purus platea sit eu id nisi litora libero. Neque vulputate conset.**
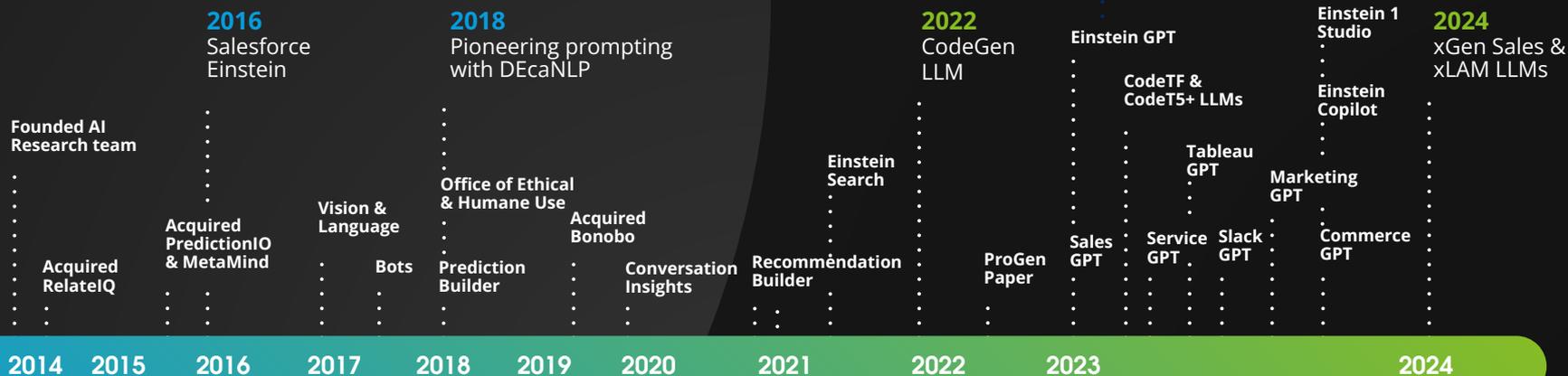
Salesforce pioneered
Enterprise AI

Wave 1

Predictive

Wave 2

Copilots

2T AI results per week

2016
Salesforce
Einstein

2018
Pioneering prompting
with DEcaNLP

2022
CodeGen
LLM

Einstein GPT

Einstein 1
Studio

2024
xGen Sales &
xLAM LLMs

Founded AI
Research team

CodeTF &
CodeT5+ LLMs

Einstein
Copilot

Office of Ethical
& Humane Use

Einstein
Search

Tableau
GPT

Vision &
Language

Acquired
Bonobo

Marketing
GPT

Acquired
PredictionIO
& MetaMind

Bots

Sales
GPT

Service
GPT

Slack
GPT

Commerce
GPT

Acquired
RelateIQ

Prediction
Builder

Conversation
Insights

Recommendation
Builder

ProGen
Paper

| 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |

The 3rd wave of AI is **Agents**

Wave 1

Predictive

Wave 2

Copilots

Wave 4

Robotics

Wave 5

Artificial General Intelligence

"Agentforce outperforms our old chatbot by 40%."

WILEY

"Agentforce could be Salesforce's most powerful support tool yet."

OpenTable

"Agentforce will free our teams to focus on their highest-value tasks."

Bombardier

Agentforce : Unlocking Deloitte's potential

Drowning in Data? Can't find what you need, when you need it?

Tired of Tedious Tasks? Manual processes killing your productivity?

Missing Out on Opportunities? Wish you could anticipate client needs?

Silos Limiting Collaboration? Struggling to connect with the right people and resources?

Lost in the Labyrinth? Overwhelmed by Deloitte policies and resources?

Deloitte's Agentforce

"Agentforce will transform the way Deloitte works, driving innovation, collaboration, and growth by connecting people, systems, and intelligence."

Get the right insights, right now. Agents are always on, listening for signals and surfacing what matters most.

Automate those workflows and reclaim your time. Agents take care of the busywork, so you don't have to.

Seize every opportunity. Agents connect dots and help you get more out of your existing systems.

Foster seamless collaboration across Deloitte's global network. Agents connect you with the right people and resources.

Personalized guidance for every employee, every step of the way. Agents simplify the complex and guide you on your journey.

Meet Your Agentic Team

Relationship Agent

Pursuit Agent

Risk and Independence Agent

Account Strategy Agent

Employee Experience Agent

Client Experience Agent

I will help you strengthen your relationships

SAVING YOU
66 minutes
per week

I will help you optimize pricing and win more

SAVING YOU
40 minutes
per week

I will help you proactively complete your risk processes

SAVING YOU
13 minutes
per week

I will help you with dynamic account planning and 360 client views

SAVING YOU
102 minutes
per week

I will help you manage your employee experience
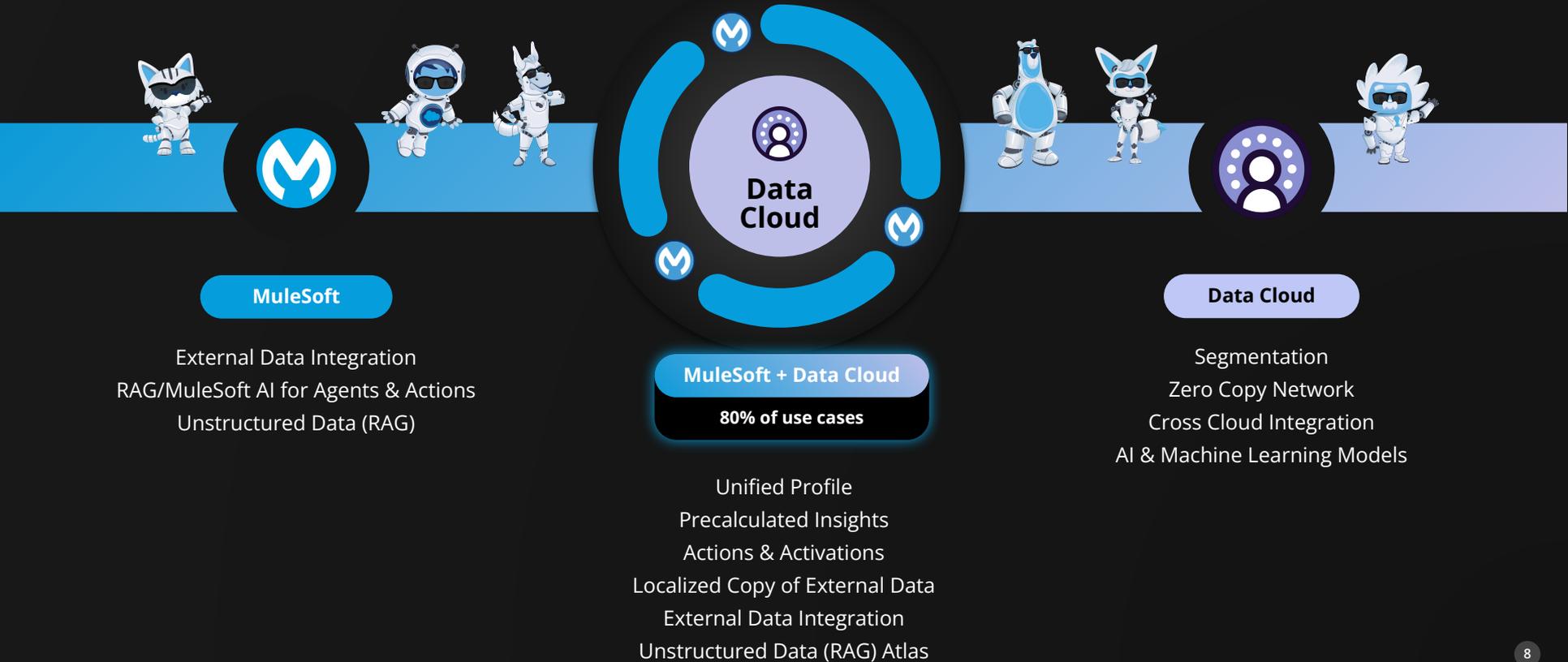
SAVING YOU
1.3 minutes
per week

I will help you manage client experiences

SAVING YOU
9 minutes
per week

* Time savings estimates are based on a conservative 10% capture estimate

Data Cloud & Mulesoft for Agentforce

Data Cloud

MuleSoft

External Data Integration

RAG/MuleSoft AI for Agents & Actions

Unstructured Data (RAG)

MuleSoft + Data Cloud

80% of use cases

Unified Profile

Precalculated Insights

Actions & Activations

Localized Copy of External Data

External Data Integration

Unstructured Data (RAG) Atlas

Data Cloud

Segmentation

Zero Copy Network

Cross Cloud Integration

AI & Machine Learning Models

100+

Deloitte-specific actions / prompts for Agent*force*

Relationship Agent

Tailored contact summary

Discover firm relationships

Determine alumni influence

Summarize contact projects

Connect to relevant colleagues

Show accounts with strong relationships

Colleagues w/ high relationship scores to my contacts

Show my contacts' engagement with us

Draft introduction customer email

AI suggested value props

Track relationship health

Update opportunity post-meeting

Meeting prep

Content my contacts might be interested in

Pursuit Agent

Tailored client summary

Review thought leadership for this opportunity

Proactive oppty guidance

AI guided selling

Quote creation

AI contract generation

Suggest pricing/discount

Auto obligation generation

Sales deals based on unsold service offerings

Next best actions to progress my oppty's stages

Risk & Independence Agent

Independence conflict checking

Regulatory change navigation

Client risk profiling

Engagement risk prioritizing

Data security and privacy guardian

AML and fraud detection

Ethical conduct monitoring

Account Strategy Agent

Dynamic account plans

Real-time account plan updates

Dynamic client 360 views

Plan account engagements

Identify whitespace

Forecast account growth trajectory

Conduct competitive landscape analysis

Develop compelling account narratives

Update cross-functional teams

Update shared account knowledge base

Employee Experience Agent

Personalize learning recommendations

Skill matching - best fit

Skills development

Analyze content for bias

Automate time tracking

Facilitate networking and mentoring

Guide employee wellbeing

Client Experience Agent

Proactive issue resolution

Find key documents and invoices

Retrieve engagement details

Identify payment terms for engagement

Access Deloitte's latest research

Facilitate introductions with Deloitte experts

Offer language support

Provide clients with personalized news

Provide personalized onboarding

Facilitate client feedback

Curate personalized client dashboards

Answer billing questions

Update client contact information

Watch Deloitte's Agent*force* demos and learn more

sfdc.co/deloitte-salesforce

Relationship Agent

I will help you with…

Meeting Prep

Client Personalization

Today

"**I have to dig through multiple systems** to find client details, past interactions, and relevant Deloitte expertise."

"I **don't know which client experiences are most effective** or which events to suggest."
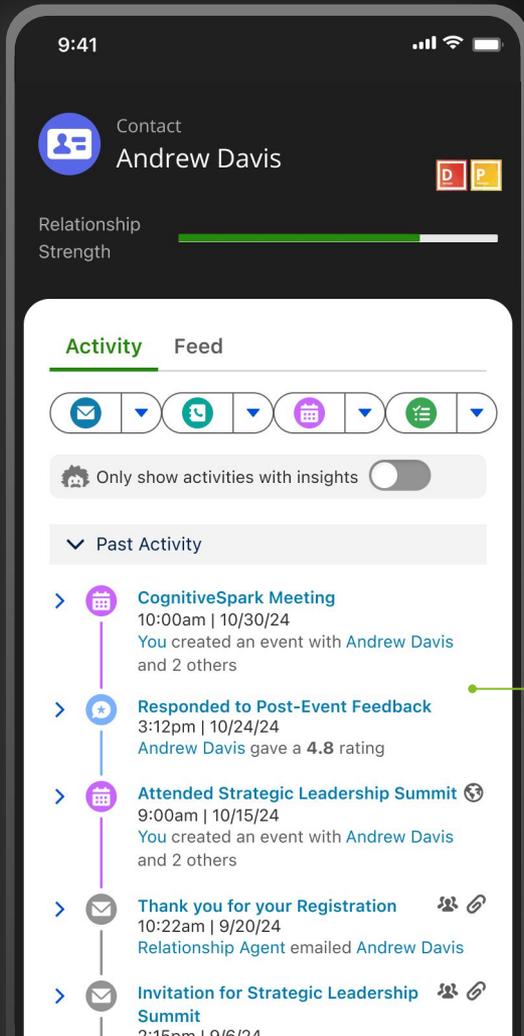
"I **need to understand my clients' feelings in real-time** so I can address concerns quickly."

Tomorrow

Relationship Agent automatically finds and gathers all the relationship information I need.

Relationship Agent tells me which experiences and events will be most impactful for each client.

Relationship Agent constantly monitors client sentiment and alerts me to any changes or trends.

Phone mockup content

9:41

Contact
Andrew Davis

Relationship
Strength

Activity   Feed

Only show activities with insights

∨ Past Activity

> **CognitiveSpark Meeting**
> 10:00am | 10/30/24
> You created an event with Andrew Davis
> and 2 others

> **Responded to Post-Event Feedback**
> 3:12pm | 10/24/24
> Andrew Davis gave a **4.8** rating

> **Attended Strategic Leadership Summit** 🌐
> 9:00am | 10/15/24
> You created an event with Andrew Davis
> and 2 others

> **Thank you for your Registration**
> 10:22am | 9/20/24
> Relationship Agent emailed Andrew Davis

> **Invitation for Strategic Leadership**
> **Summit**
> 3:15pm | 9/6/24

Right panel

I will help you…

discover tailored event recommendations to nurture and strengthen key relationships.

....

identify key measurements to inform decision making

....

orchestrate the event and surface related interactions

DELOITTE SYSTEMS UTILIZED   CIW   KX Global   Jupiter   Adobe Analytics

11

Risk & Compliance Agent

Assists you with…

Client Acceptance

Engagement Acceptance

Independence Assessment

Today

"**Manually checking for independence conflicts is time-consuming and stressful**, and I often miss critical signals."

"**Keeping track of client acceptance requirements creates a lot of overhead**, and it's easy to miss key details."

"Managing joint business relationships is complex, and **I can't always stay on top of the latest changes**."

Tomorrow

"My Agent automatically checks for conflicts, alerts me to issues, and gives me peace of mind."

"My Agent manages client acceptance requirements and alerts me to any missing information or potential issues."

"My Agent helps me navigate joint business relationships and stay up-to-date on the latest regulations."

Opportunity changed from Time & Materials to Fixed Fee
Your Risk Assessment has been updated based on this change in pricing structure

Opportunity changed from Fixed Fee to Time & Materials
Your Risk Assessment has been updated based on this change in pricing structure
2m ago
Review Changes

Potential conflict identified
Review Client Acceptance & Engagement analysis and affected pursuits in pipeline
5m ago
Review Conflict

Topic: Q4 Market Strategy Review - Team Alignment Session
1h ago

Quarterly Compliance Training Reminder
Don't forget to complete your compliance training
3h ago

Erika Simmons invited you to an Event

I will help you...

Agents automatically kicks off appropriate risk processes associated with a client & opportunity

Agent automates risk record creation

Agent proactively provides initial answers by reviewing pursuit and client details

Agent notifies & recommends actions to partners based on risk analysis

DELOITTE SYSTEMS UTILIZED

Jupiter   R&I

13

Account Strategy Agent

Assists you with…

Dynamic Account Planning

360 Client View

Today

I waste time gathering client information from different sources, which leads to missed opportunities.

I find account planning a painful and disconnected process, making it hard to track progress and make informed decisions.

I don't want to miss potential opportunities because I don't have a complete picture of my clients' needs and priorities.

Tomorrow

Account Strategy Agent automatically provides a 360° client view with proactive alerts, enabling rapid response.

Account Strategy Agent automatically creates dynamic account plans with valuable insights, helping me increase win rates.

Account Strategy Agent proactively identifies and alerts me to potential opportunities based on my clients' profiles and market trends.

Experience Agent Demo

I will help you...

Connect local member firm systems within an autonomous agent engagement layer

Streamline cross-departmental workflows with a unified personalization platform.

Create a personalized view of Jupiter
with proactive alerts and mobile support
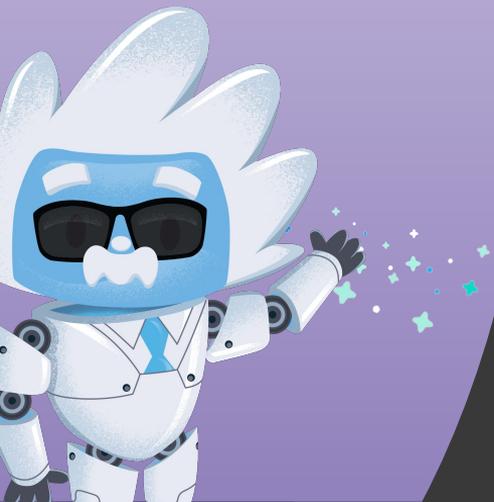
DELOITTE SYSTEMS UTILIZED

Jupiter   Local Systems

Client Experience Agent

Assists you with…

Digital Concierge

Client Support

Today

"The sheer volume of content on Deloitte.com can make finding specific information akin to searching for a needle in a haystack**.**"

"Our project team is spread across multiple systems and workgroups. Keeping everyone aligned is challenging"
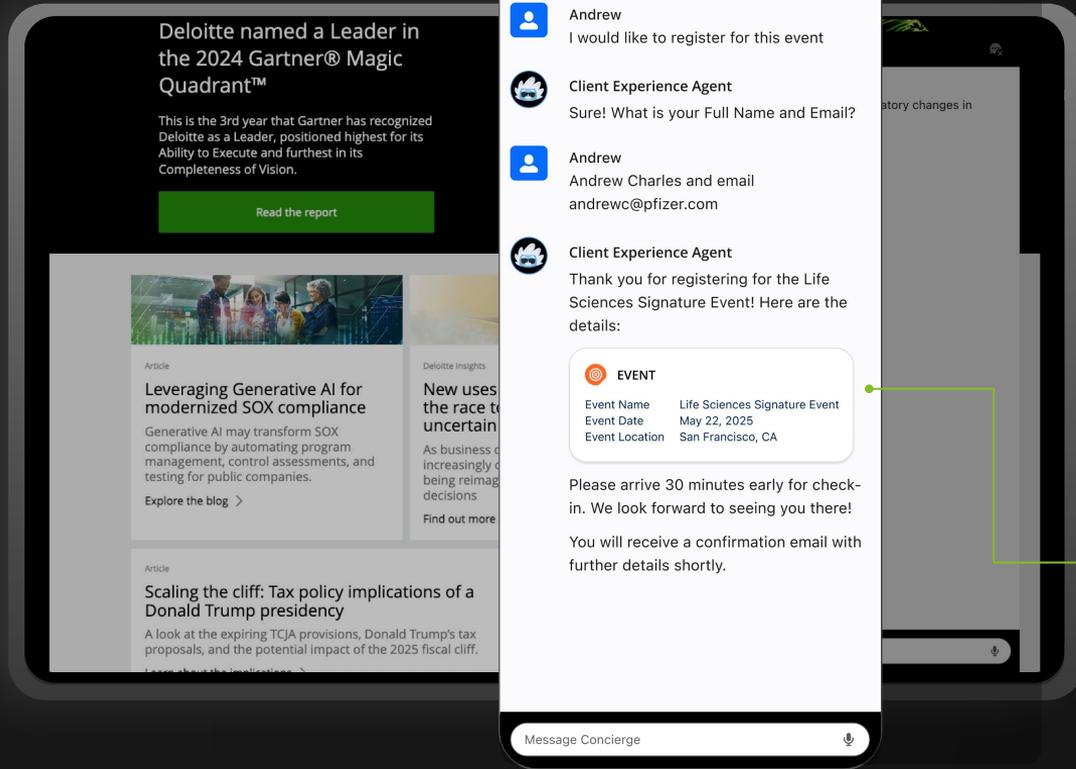
"A centralized platform for rapid access to resources and support is currently unavailable."

Tomorrow

Digital Concierge Agents quickly locate relevant content and experiences in response to simple questions.

A centralized digital workspace keeps our team connected and aligned with the Deloitte engagement team.

Client Agents provide efficient support by summarizing meetings, finding necessary documents, and addressing support requests promptly.

Deloitte Concierge

Andrew
I would like to register for this event

Client Experience Agent
Sure! What is your Full Name and Email?

Andrew
Andrew Charles and email andrewc@pfizer.com

Client Experience Agent
Thank you for registering for the Life Sciences Signature Event! Here are the details:

EVENT

Event Name	Life Sciences Signature Event
Event Date	May 22, 2025
Event Location	San Francisco, CA

Please arrive 30 minutes early for check-in. We look forward to seeing you there!

You will receive a confirmation email with further details shortly.

Message Concierge

Deloitte named a Leader in the 2024 Gartner® Magic Quadrant™

This is the 3rd year that Gartner has recognized Deloitte as a Leader, positioned highest for its Ability to Execute and furthest in its Completeness of Vision.

Read the report

Article
Leveraging Generative AI for modernized SOX compliance
Generative AI may transform SOX compliance by automating program management, control assessments, and testing for public companies.
Explore the blog ›

Deloitte Insights
New uses the race t uncertain
As business increasingly being reimag decisions
Find out more

Article
Scaling the cliff: Tax policy implications of a Donald Trump presidency
A look at the expiring TCJA provisions, and Donald Trump's tax proposals, and the potential impact of the 2025 fiscal cliff.

I will help you…

Offer personalized digital interactions on Deloitte.com with dedicated client concierges.

Unlock thought leadership with the power of guided agents

Nurture curiosity and deepen client relationships by recommending relevant events and experiences
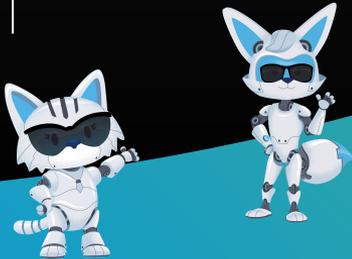
DELOITTE SYSTEMS UTILIZED

CIW

KX GLOBAL

17

Deloitte's Agentforce is a **Digital Laborforce** that will drive **$XXX** **in operating margin.**

$XXX MILLION

Margin Impact

Agentic Use Cases

"[Agentforce is] actually an appreciating technology asset, which is pretty incredible."

SALESFORCE LEADER
POSITION NAME

In conclusion we have proactive AI with generative content and automated action that is scaled from the most strategic deals to the edges of Deloitte.

What transformation is needed to move into the future?

Unlock Data	Global Success and Maturity	Solve Adoption	Innovation & AI
Data Foundations	Performance at Scale	Human-Centered Experiences	Measured ROI with Continuous Improvement

A strong data foundation that will unlock data

Prepare Data for AI

Data Cleanup & Deduplication efforts are in progress.
Five AgentForce use cases implemented with Deloitte Data

Started

Open Up Data Silos

Currently aligning on a **North Star Reference Architecture**

Early stages

Improve Data Governance

Ongoing org assessment and data platform work, including data governance framework refinement

Maturing

Solving Adoption Issues Starts with the Users

Adoption **50%** ···▶ **100%**

1 Foundational User Research to **solve the right problems**

2 Co-create an **outcomes-based E2E Blueprint**

3 **Get early signals on value** with Concept & Usability Testing

~20k PPMDs

~40k Sr. Managers

~210k Salesforce Users

First set of interviews for [Project] started October

22

Program Governance

		FROM		TO
TIER 1 **Strategic Alignment**		Siloed Programs	Clarity >>	End-to-end Alignment
TIER 2 **Operational Velocity**		Informal	Strength, depth, measures >>	Formal
TIER 3 **Delivery Excellence**		Tactical	Shift left; expand >>	Strategic
TIER 4 **Optimal Execution**		Reactive	Cross-functional collaboration & agility >>	Continuous Innovation

24

Executive Summary

360 CO-CREATED PARTNERSHIP VISION

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Proin tortor purus platea sit eu id nisi litora libero. Neque vulputate consequat ac amet augue blandit maximus aliquet congue. Pharetra vestibulum posuere ornare faucibus fusce dictumst orci aenean eu facilisis ut volutpat commodo senectus purus himenaeos fames primis convallis nisi.

Adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Proin tortor purus platea sit eu id nisi litora libero. Neque vulputate consequat ac amet augue blandit maximus aliquet congue. Pharetra vestibulum.

STRATEGIC PARTNERSHIP DESIGN PRINCIPLES

1. **Lorem** ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod
2. **Lorem** ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod
3. **Lorem** ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod
4. **Lorem** ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod
5. **Lorem** ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod
6. **Lorem** ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod

DESIRED OUTCOMES

1. Salesforce + Deloitte **Outcome 1**
2. Salesforce + Deloitte **Outcome 2**
3. Salesforce + Deloitte **Outcome 3**
4. Salesforce + Deloitte **Outcome 4**

Partnership Renewal Design Principles

Today

Hybrid Uncapped SELA

GLOBAL UNLIMITED ENTITLEMENTS

App 1	Lorem ipsum dolor
App 2	Lorem ipsum dolor
App 3	Lorem ipsum dolor
App 4	Lorem ipsum dolor
App 5	Lorem ipsum dolor

LIMITED QTY ENTITLEMENTS

App 1	Lorem ipsum dolor
App 2	Lorem ipsum dolor
App 3	Lorem ipsum dolor
App 4	Lorem ipsum dolor
App 5	Lorem ipsum dolor
App 6	Lorem ipsum dolor

$XXM / year

Renewal Design Principles

1. **Lorem** ipsum dolor sit amet consectetur
2. **Lorem** ipsum dolor sit amet consectetur
3. **Lorem** ipsum dolor sit amet consectetur
4. **Lorem** ipsum dolor sit amet consectetur
5. **Lorem** ipsum dolor sit amet consectetur
6. **Lorem** ipsum dolor sit amet consectetur

Tomorrow

360 Alliance Investment Fund: $XXX

SALESFORCE INVESTMENT INTO DELOITTE'S PRACTICE AREAS

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Proin tortor purus platea sit eu id nisi litora libero. Neque vulputate consequat ac amet augue blandit maximus aliquet congue. Pharetra vestibulum posuere ornare faucibus fusce dictumst orci aenean eu facilisis ut volutpat commodo senectus purus himenaeos fames primis convallis nisi.

Unlimited SELA + Agent*force* Innovation

FUTURE INNOVATION (US FOCUS)

App 1	Lorem ipsum dolor sit amet
App 2	Lorem ipsum dolor sit amet

GLOBAL UNLIMITED ENTITLEMENTS

App 1	Lorem ipsum dolor sit amet
App 2	Lorem ipsum dolor sit amet
App 3	Lorem ipsum dolor sit amet
App 4	Lorem ipsum dolor sit amet
App 5	Lorem ipsum dolor sit amet
App 6	Lorem ipsum dolor sit amet

LIMITED QTY ENTITLEMENTS

App 1	Lorem ipsum dolor sit amet
App 2	Lorem ipsum dolor sit amet
App 3	Lorem ipsum dolor sit amet
App 4	Lorem ipsum dolor sit amet
App 5	Lorem ipsum dolor sit amet
ADD-ON PARTNER	Lorem ipsum dolor sit amet

Software Total: $XXXM / year

Deloitte's Model is Unparalleled in Value
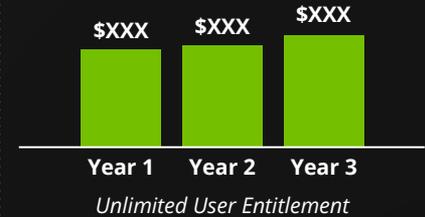

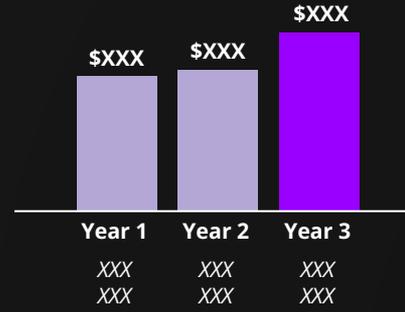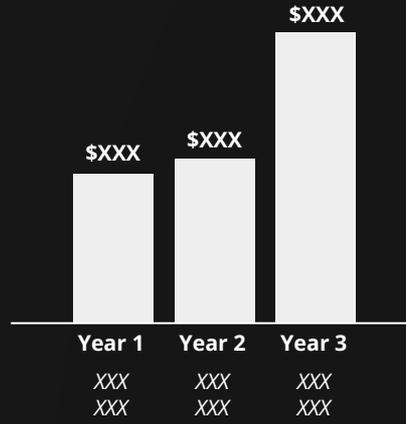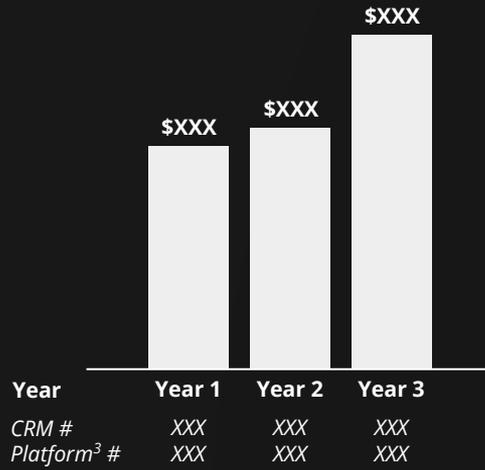**Deloitte Self-Reported "Deployed" Licenses**

@ SF "Market Rates"

Salesforce Reporting "Deployed" Licenses

@ Deloitte's Contract Rates

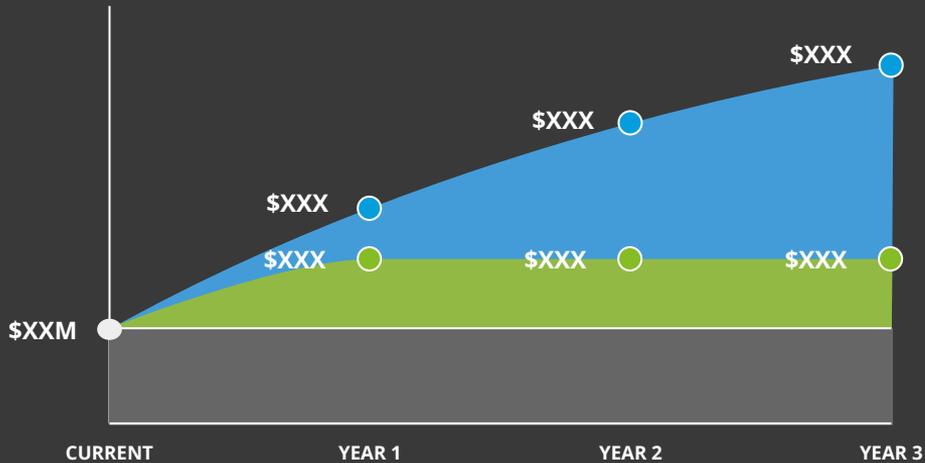**Deloitte Self-Reported "Active Users"**

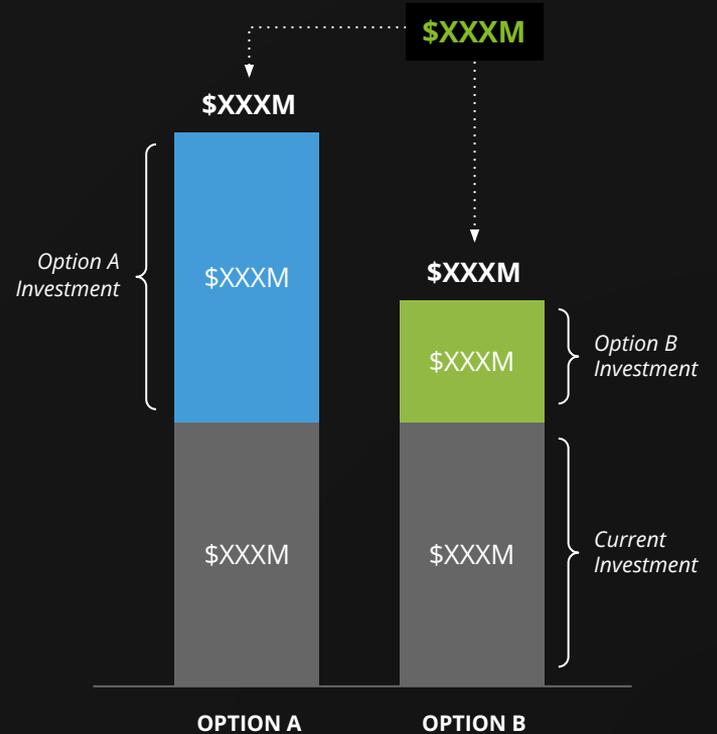**@ Deloitte's Contract Rates**

What Deloitte Pays for Unlimited Users

Year	Year 1	Year 2	Year 3
CRM #	XXX	XXX	XXX
Platform[3] #	XXX	XXX	XXX

$XXX $XXX $XXX

	Year 1	Year 2	Year 3
	XXX	XXX	XXX
	XXX	XXX	XXX

$XXX $XXX $XXX

	Year 1	Year 2	Year 3
	XXX	XXX	XXX
	XXX	XXX	XXX

$XXX $XXX $XXX

Year 1	Year 2	Year 3

Unlimited User Entitlement

$XXX $XXX $XXX

Deloitte. | salesforce

Thank You.