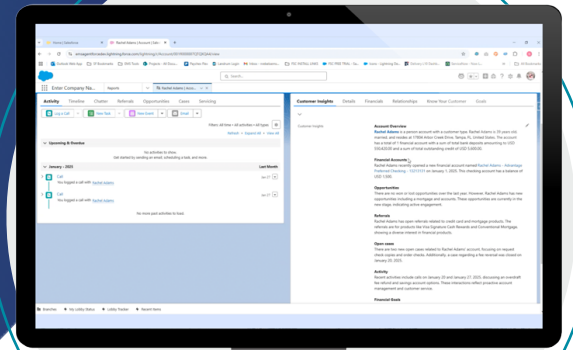


Customer Insights Agent

*A Single View of Customer Data—
Instantly, from Multiple Sources.*

salesforce

Agentforce



Customer Overview Snapshot Includes:



ACCOUNT OVERVIEW

Account details & financial data



FINANCIAL ACCOUNTS

Summary of accounts in last 60 days



OPPORTUNITIES & REFERRALS

Won/lost opptys & referral summaries



OPEN CASES

Won/lost opptys & referral summaries



ACTIVITIES & TASKS

Upcoming tasks/events & key activity history



KEY CONTACTS

Primary contacts for business accounts



FINANCIAL GOALS

Goal progress with completion percentage



LIFE EVENTS & ALERTS

Recent events and active customers alerts

What is the Customer Insights Agent?

The Customer Insights Agent delivers a real-time, centralized view of customer data, eliminating the need for manual searches and screen-switching simply by clicking a button on your Salesforce homepage. Experience faster, smarter, and more personalized customer interactions.

Key Benefits Include:

- **Eliminate wasted time** by accessing all customer data in one place.
- **Empower teams** with a 360° view of financials, cases, and interactions.
- **Enhance decision-making** with real-time insights.
- **Improve customer service** through quicker, more informed responses.

Schedule a 15-Minute Demo

*Deliver smarter, faster service with a 360° view.
Contact EMS Consulting today.*

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