Agentic government

Not a vision for tomorrow, a necessity and possibility for today

Digital convenience is a commercial sector norm, and citizens increasingly expect the same from government. According to Salesforce research, 75% of people believe government services should match those available from the private sector, while 50% want agencies to understand their unique needs and adapt to changing preferences. Government workers are aligned – 63% say enhanced digital workplace tools would help them do their best work.

At Salesforce World Tour D.C., the future of digital government came into sharper focus – driven by a blend of data, trust and human-centered AI. The solution? Agentforce, a team of autonomous agents that work side-by-side with your employees to extend and reinforce your workforce, helping serve your stakeholders 24/7.

“Agentforce is the next evolution in digital government, a digital labor platform that is proactive, adapting to the public's needs in real-time,” said Susan Go, senior director of solution engineering for Salesforce, during the session *Public Sector: Drive Efficiency and Impact with AI*. “Efficient with “AI-driven decision making that enhances service delivery and [is] trusted, secure and compliant.”

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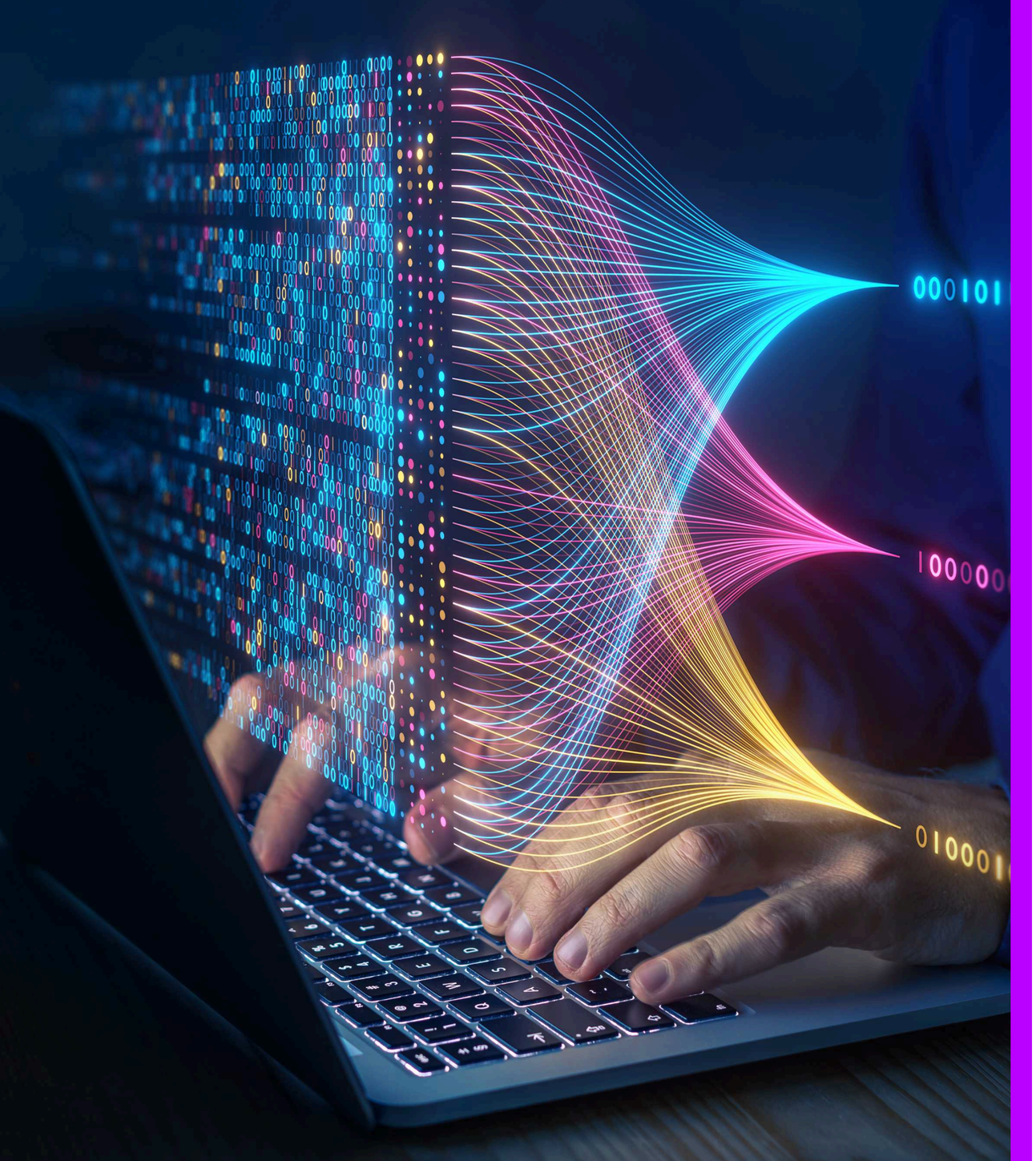


Agentforce allows organizations to build and manage autonomous AI "agents" integrated into the Salesforce platform. Agents can reason and take action, working across applications both internally to support government employees, and externally to deliver fast, seamless constituent experiences. Agents understand natural language, can quickly accomplish arduous manual tasks such as sifting through policy documents, automate actions like creating cases or updating records, detect fraud anomalies before they occur and more.

“These AI-powered agents are like your dream team, handling the grunt work and sorting out the data mess so you can focus on the big picture,” explained Mia Jordan, Salesforce’s industry advisor for public sector.

Organizations can create agents to meet their specific needs in five steps:

1. **Define the role:** Outline what your agent does, like a job description
2. **Specify the data:** Determine which datasets, knowledge bases and records the agent can access.
3. **Enable business actions:** Identify which tasks the agent can automate, such as scheduling or creating cases.
4. **Set guardrails:** Establish what the agent can and cannot do without human oversight.
5. **Deploy the agent to designated channels:** Choose where your agent will live. This could be in Slack, on a website, via SMS or across multiple channels.

1. Define the role.

What job(s) should the agent perform?

Role is where you express the Agent's persona and goals. This defines the job to be done and the broader goals the agent should achieve on your team.

Example

*"You are a **claims specialist** who handles complex inquiries related to **benefits eligibility**. You can also assist with **case/claim creation, status checking, and provide guidance** using official documentation/manuals."*

2. Specify the data.

What data does the agent need to be successful?

This is where the data an agent needs to be successful is identified. This could include company knowledge articles, CRM data, PDF's, external data via Data Cloud or Mulesoft, public websites, and so on.

Example

*"You can use **CRM, knowledge, case, web, and enterprise data** for support, but claims analysis must rely solely on the agency's **Claims Processing Manual and claim-specific information**."*

3. Enable business actions.

What capabilities do they have?

The actions an agent can fulfill. This is the predefined task an agent can execute to do its job based on a trigger or instruction. For example, it could run a flow, prompt template, or Apex.

Example

*"**Analyze and summarize claims**, updating them with human approval. **Answer questions** regarding program eligibility, forms and policies. Guide thru application processes, and **provide step-by-step instructions** for forms. **Escalate complex issues**."*

4. Set guardrails.

What guidelines does the agent operate under?

The guidelines an agent can operate under. These can be natural-language instructions telling the agent what it can and can't do, when to escalate to a human, or could come from built-in security features in the Einstein Trust Layer.

Example

*"**Do not** update records without human approval. Use only provided documentation to answer questions. **Do not disclose PII without explicit consent**. **Refrain** from legal or medical advice"*

5.

Deploy the agent to designated channels.

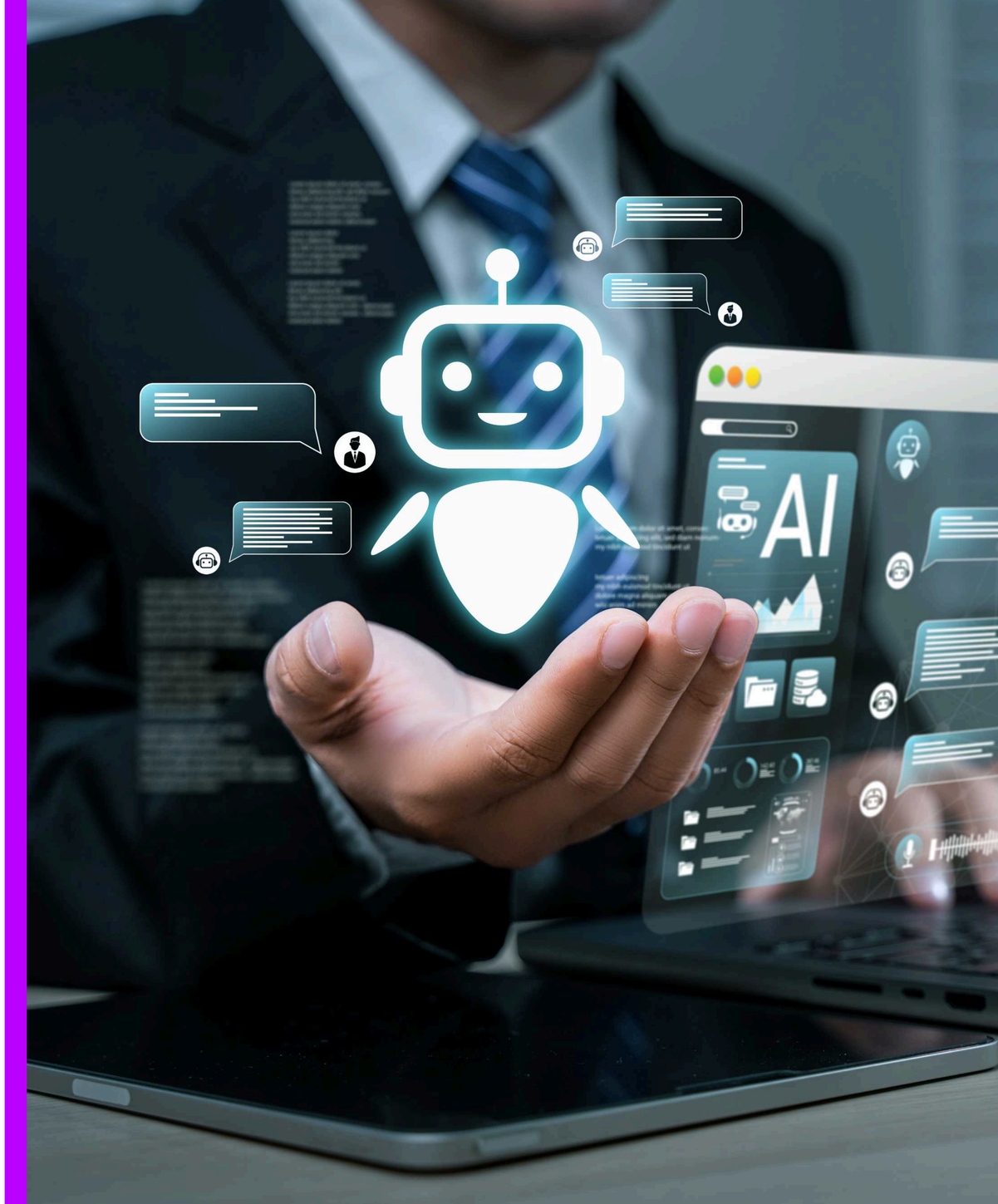
Where do they work?

The applications where an agent gets work done. This can be your website, CRM, mobile app, Slack, BaseCamp, and more.

Example

Salesforce, Text, Voice, Chat, Slack, WhatsApp.

Some of the most prominent federal agencies are already embracing the concept of an agentic government – where humans and AI digital agents collaborate to anticipate needs, streamline decisions and boost productivity.



USPS: A 167-million-stop journey gets smarter

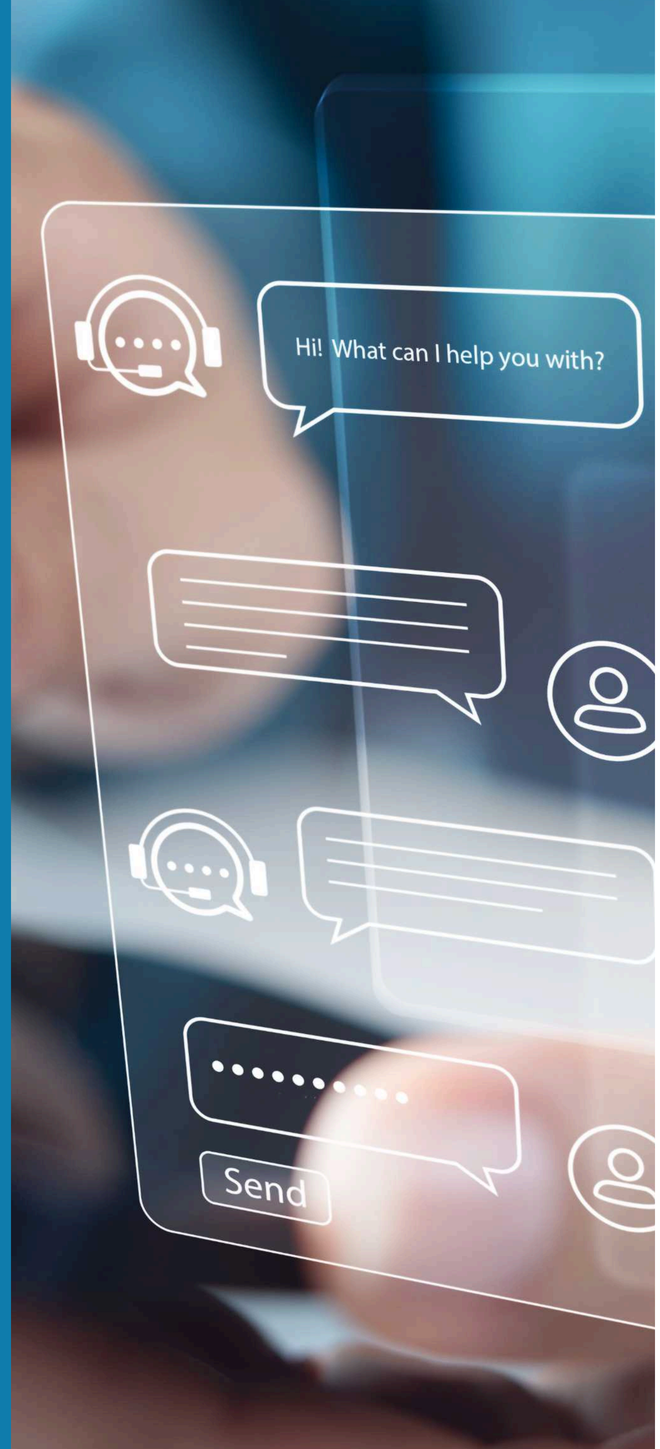
The United States Postal Service maintains the largest physical and logistical infrastructure of any non-military government organization, with the mission to deliver to 167 million addresses six days a week. During the height of the COVID-19 pandemic, USPS deployed Salesforce Service Cloud to help manage the influx of call center and online traffic via an intuitive, AI-powered workspace.

“We had up to 100 million calls, over 13 million service requests and [Service Cloud] was able to handle that extremely efficiently,” said Marc McCrery, vice president of customer experience at USPS, noting that his team has also begun harnessing Salesforce AI to analyze customer feedback and compliant data to expand its knowledge base, and identify process inefficiencies and opportunities for improved self-service.

But with Agentforce on the forefront, USPS is just getting started.

“This summer, we’re switching to a cloud-based application with natural language interactions instead of a menu-driven IVR,” said McCrery. It’s the first step in a "crawl, walk, run" strategy. The crawl starts with 1,600 internal agents; the walk expands AI use to the broader community in the Postal Service, about 60,000 Salesforce users; the run will open direct chat access to customers.

Agentforce in action: USPS



Potential use case

Go outlined a scenario in which she is looking for the fastest method to send a care package with fresh cookies to her son in college. Rather than sifting through the entire USPS website for answers, she can ask a digital agent to provide the right shipping options, start the process and even request updates about other account information.

The agent

- **Role:** A digital customer service agent that handles shipping queries, service updates and complaint routing.
- **Data:** Pulls from public shipping info, internal knowledge bases and complaint histories.
- **Actions:** Offers next-best shipping options, checks account activity, initiates claims.
- **Guardrails:** Cannot update records without human review.
- **Deployment channel:** Embedded on USPS' website for easy public access.

"What could have taken me maybe 10 to 15 minutes of searching the website, maybe even talking to a customer service agent, I was able to get done in seconds with Agentforce," said Go. "Now multiply the 10 to 15 minutes by the millions of people you serve, and the savings to your constituents and your customer service agents is transformative."

VA: Elevating care with Slack AI and Agentforce

The United States Department of Veterans Affairs National Emergency Medicine Office supports urgent care for 2.5 million veterans at 145 sites nationwide. For an organization that handles high-pressure, sometimes life-or-death situations, streamlined internal communication is a mission imperative. Josh Geiger, director of operations for the VA's emergency care network, worked with Salesforce to implement a streamlined Slack AI channel for staff.

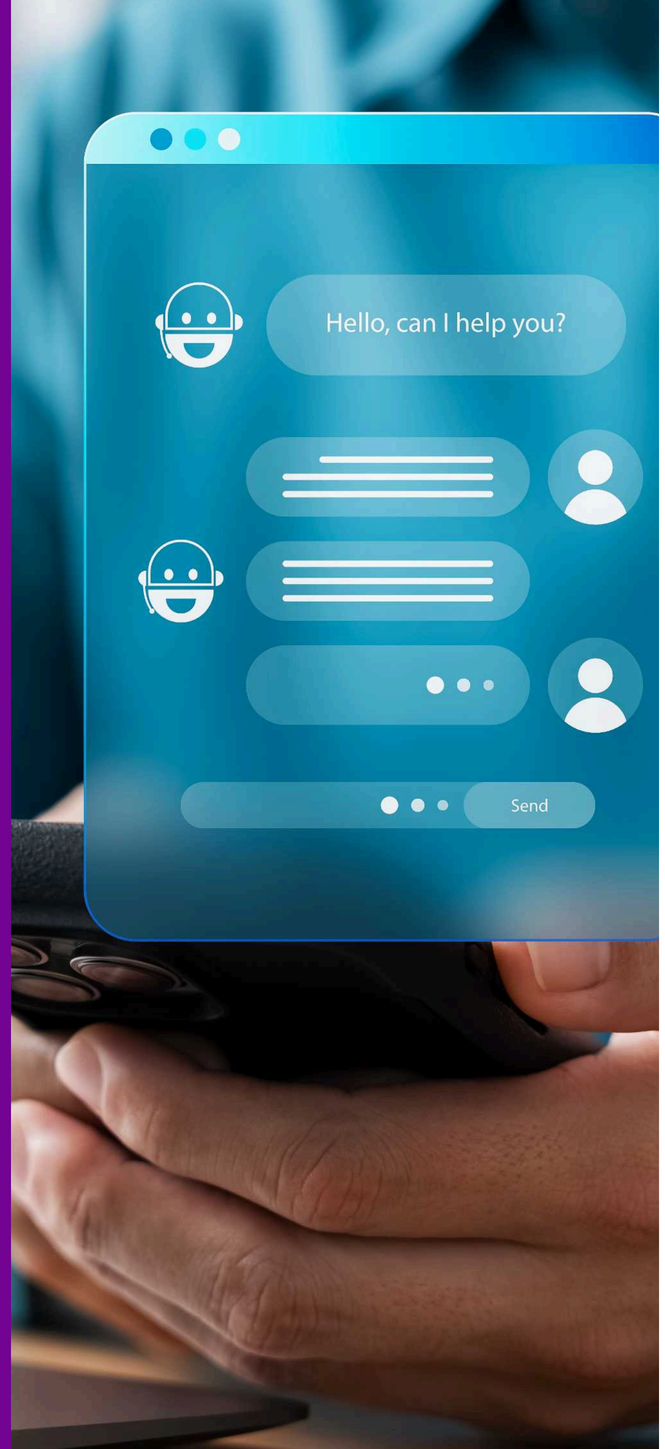
Looking ahead, Geiger wants the VA to take AI capabilities to the next level.

"AI can be where I can't be," he said. "Now, if you're talking about costs and efficiencies, if you're spending time going to ask questions and you're waiting on information, imagine an AI bot can be there."

The VA is designing digital assistants to enhance its Salesforce-supported telehealth program, VA Health Connect, to reduce the number of steps and actions veterans and their providers must take in the care process.

Agentforce in action:

VA



Potential use case

During *Federal Community of Practice: Drive Efficiency with Agents*, Geiger and Andy Cather, a distinguished engineer for Salesforce, highlighted a common string of events: A patient must locate a care facility and call an administrator to make an appointment, then their nurse or doctor needs to find a location to send them for specialized services like imaging, or locate a pharmacy to send a prescription. Cather conducted a live demo of how one agent could serve as each of those touch points – actively listen to a clinical conversation, retrieve relevant policies, suggest nearby providers and prepare information for care teams.

The agent

- **Role:** A digital medical assistant that supports telehealth, scheduling and care coordination.
- **Data:** Accesses VA locations, network providers, medical policy documents and service eligibility rules.
- **Actions:** Schedules appointments, routes prescriptions, summarizes clinical notes.
- **Guardrails:** Avoids clinical advice and unapproved web sources; requires human review for sensitive actions.
- **Deployment channel:** Lives in Slack, mobile apps and sites like VA Health Connect.

What's next: A comprehensive path to modernized government

USPS and the VA are demonstrating the art of the possible when government takes a thoughtful, human-first approach to AI. Salesforce is supporting that momentum with a slate of upcoming innovations this year:

- 13 new public sector agent skills to accelerate tasks and support delivery.
- Data Cloud, the foundation of Agentforce, is coming to Government Cloud to unify constituent data across systems and give AI agents the context they need to deliver accurate, personalized support.
- Tableau Next will deliver predictive analytics, generative AI and real-time insights directly into users' workflows.
- FedRAMP High authorization is on track for both Data Cloud and Tableau Next in the coming months.

> **"The mission is not changing and the expectations aren't lowering. So instead of asking, 'What if?' let's start declaring, 'Why not?' Why not remove hurdles between constituents and the services that they deserve? Why not make government work like magic with a little help from AI, and why not give our teams the tools that they deserve to amplify their impact? … We're not here to slap a fresh coat of paint on old processes. We're here to help you rebuild with intelligence.**
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> **Mia Jordan**
> Industry Advisor for Public Sector, Salesforce

Learn more about Agentforce and its transformative potential in the public sector.

Federal Community of Practice: Drive Efficiency with Agents