

Master Data Management Extension for Agentforce

Unlocking the Full Potential of Agentforce Agents with Trusted Master Data

Overview

In the modern enterprise landscape, AI agents are indispensable across diverse business functions, autonomously managing tasks ranging from customer service sales, to employee support, and personalized shopping assistance. Powered by advanced natural language understanding and large language models, these intelligent systems drive efficiency and scalability by automating routine processes and engaging customers in real time.

However, to truly deliver accurate and meaningful outcomes, AI agents require seamless access to the right context and trusted data. Without a reliable source of high-quality master data, such as validated customer profiles, product information and relationship hierarchies, AI agents risk making uninformed decisions that can lead to inefficiencies or poor customer experiences.

The Master Data Management (MDM) Extension for Agentforce empowers Salesforce's Agentforce AI agents to make smarter, more reliable business decisions through seamless, real-time access to trusted, high-quality master data from **Informatica MDM**.

By integrating MDM capabilities directly into the Agentforce platform, businesses gain a single source of truth that fuels AI-driven automation and personalized engagement across sales, service and commerce functions.

The extension ensures data integrity by grounding all AI actions in MDM-governed data, ensuring that agent insights and responses are based on the most accurate, complete and trusted information available.

Solution Components

- **Agentforce AI Agents:** Intelligent autonomous agents capable of understanding natural language and performing tasks within Salesforce. Agents (Sales, Service, Personal Shopper) autonomously execute data discovery and retrieval tasks, automating manual data lookups and accelerating time-to-resolution.
- **Informatica MDM:** Provides trusted master data, including golden records, comprehensive 360-degree profiles including customer hierarchies, product information and relationship graphs.
- **API Center and IDMC Platform:** Centrally manage secure API connections between Agentforce Actions and IDMC-managed MDM APIs, enabling seamless data exchange. The architecture leverages Apex Actions and (**Informatica Cloud Application Integration**) CAI Process Orchestration to securely connect Agentforce to MDM applications via the API Center, providing a robust foundation for reliable Agentforce AI.

How It Works

1. **Context and Scope Definition:** Every Agentforce Agent's scope and context are clearly defined with proper instructions and are known as Topics. Within each Topic, the agents are expected to execute any specific task to fetch information from Salesforce data or external systems.
2. **Data Access and Enrichment:** Agentforce Agents query Informatica MDM to identify customers and products to ensure that Agents have the right context and information to execute the next set of actions.
3. **Action Execution:** Agents can then perform automated actions — creating contacts, assigning account managers, drafting emails and generating opportunities, for example — based on enriched master data.

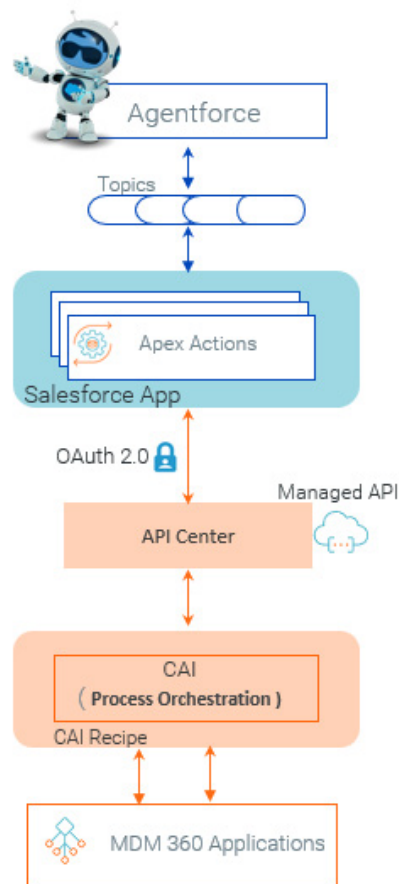


Figure1: Steps taken by Agentforce Agents to perform autonomous tasks.

Extension Assets:

- **Out of the box Agentforce actions** to identify and retrieve customer and product records, including relationships from Informatica **Customer 360** and **Product 360**.
- **Agentforce actions that can be customized** to retrieve golden records from other data domains based on the user request.
- **Informatica Cloud Application Integration** pre-configured for seamless Process Orchestration.
- **MDM Service Connector and an App Connection** to connect and retrieve data securely from MDM Public APIs.

Key Business Benefits

- **Smarter AI Agents:** Seamless connectivity to trusted and comprehensive master data enables Agentforce AI agents to leverage validated and enriched master data for improved accuracy in decision-making and customer interactions.
- **Transformational Use Cases:** By enabling simplified access to master data, businesses can drive exceptional **customer experiences** through AI-driven, data-driven personalization and automation. The solution improves operational efficiency and decision accuracy, for a range of business use cases across departments and functions.
- **Accelerated Lead Qualification:** Automatically identify existing customer and account information from inbound emails and create corresponding Salesforce opportunities, automating lead qualifications and expediting the sales funnel.
- **Personal Shopper:** Assist customers by retrieving detailed product and customer profile data to personalize shopping experiences and recommend gifts based on the customer's need and budget, thus enhancing customer loyalty and sales.
- **Enhances Customer Service:** Provide seamless customer experience by scheduling complex B2B service appointments by validating and updating customer addresses and service details in real time.
- **On-Demand Employee Support:** Provide employee support agents with instant access to internal company policies, HR records and IT knowledge base articles, streamlining process workflows, leading to higher productivity and faster resolution times for internal inquiries.

By seamlessly integrating Informatica MDM's records and relationships data within the Salesforce Agentforce ecosystem, the solution ensures Agentforce agents can make smarter business decisions, personalize customer interactions and automate complex workflows with confidence.

The MDM Extension provides a trusted data foundation and ready-to-use actions that accelerate and drive measurable business outcomes, unlocking the full potential of AI across sales, service and employee support functions.

Contact us for more information on how our **MDM AI Solutions** can enable your vision of becoming an Agentic Enterprise.

Where data & AI come to



Worldwide Headquarters

2100 Seaport Blvd., Redwood City, CA 94063, USA Phone: 650.385.5000, Toll-free in the US: 1.800.653.3871

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