

Technical Review: Agentforce Benefits in Salesforce Life Sciences Cloud

Karthikeyan Apparssamy

Independent Researcher, USA

Abstract: The pharmaceutical and life sciences industry faces unprecedented challenges in delivering personalized, compliant, and efficient support across complex patient and healthcare provider ecosystems. Advanced Service Cloud technologies represent a paradigm shift in how life sciences organizations approach customer relationship management and patient support services. When integrated into comprehensive life sciences platforms, these systems create unified ecosystems that empower support agents, case managers, and field teams with tools designed specifically for pharmaceutical and biotechnology requirements. The integration of artificial intelligence and cloud-based platforms has become essential for managing complex patient journeys, particularly in specialty therapy areas where treatment protocols involve multiple stakeholders and extended timelines. These technological advances prove critical in addressing the growing demand for personalized medicine approaches, which now represent a significant portion of new drug approvals. Advanced platforms demonstrate exceptional capabilities across multiple domains, including enhanced patient support experiences through comprehensive journey visibility, accelerated therapy access via streamlined onboarding processes, AI-driven decision support through sophisticated machine learning algorithms, and compliance-first case management supporting HIPAA, GxP, and FDA regulations. The technical capabilities encompass integrated knowledge management systems, end-to-end case orchestration, omnichannel coordination, and field services integration, enabling organizations to deliver superior patient outcomes while maintaining regulatory compliance and operational efficiency across diverse therapeutic areas and geographic markets.

Keywords: Agentforce, Life Sciences Cloud, Patient Support Systems, AI-driven Healthcare, Digital Transformation.

INTRODUCTION

The pharmaceutical and life sciences sector continues to experience unprecedented challenges in providing personalised, compliant, and efficient support across complex patient and healthcare provider ecosystems. The global pharmaceutical industry continues to grow rapidly, and specialty drugs present a large percentage of total pharmaceutical spend. The growing complexity of specialty drugs, cell and gene therapies, and regulatory frameworks requires sophisticated technology solutions that integrate patient services, clinical support, and field force operations in a seamless manner.

Digital transformation projects in pharmaceutical organisations are being accelerated at an amazing rate. Pharmaceutical organizations are increasingly turning to Artificial Intelligence and Cloud solutions to efficiently manage complex patient journeys that commonly involve multiple stakeholders and stretched timelines in specialty therapy spaces (Miozza, M. 2024). These technologies have become critical to managing the growing demand for personalized medicine approaches, now becoming one of the highest areas of new drug approvals.

The cell and gene therapy market has seen rapid expansion in recent years, which has generated many operational issues for pharmaceutical companies. Organizations state that the patient

onboarding time and the ongoing support costs per patient per year for advanced therapy programs seem to lag when compared to traditional therapy. Cloud-based enterprise resource planning (ERP) systems have become critical solutions for managing these challenges and have larger scalability, better data integration capabilities, and lower operational costs than their on-premise counterparts in traditional systems (Crudeli, M. 2024).

Regulatory compliance costs have increased substantially in recent years, with organizations investing heavily in HIPAA, GxP, and FDA 21 CFR Part 11 compliance activities. The implementation of integrated customer relationship management platforms specifically designed for life sciences has demonstrated substantial benefits, including significant improvements in case resolution times, reduced patient onboarding duration, and decreased compliance-related incidents following deployment.

The acquisition of advanced Service Cloud technologies indicates the beginning of a new era for how life sciences organizations view their customer relationship management (CRM) and patient support service systems. Integrating these solutions into robust life sciences platforms will create a seamless ecosystem of systems that provide support agents, case managers, and field

teams with critical tools that allow them to perform the specific functions required by pharmaceutical and biotechnology-related support services businesses. Life sciences organizations that utilize integrated platforms exhibit higher patient satisfaction scores and better patient adherence scores over time than organizations that rely on fragmented support systems.

Pharmaceutical organizations rely on and need sophisticated coordination among patient services, clinical teams, and regulatory compliance functions. The complexity of managing multiple therapeutic areas and the heterogeneous nature of patient populations and varying requirements from regional market regulators have made thorough, comprehensive technology networks an important aspect of state-of-the-art pharmacy operations. These well-founded technology ecosystems have been recognized to have more demand than ever-possibly one of the most challenging markets across more sophisticated technology, whilst also balancing future product and service delivery evolutions and business processes.

This technical review describes in detail many of the benefits of advanced service platform adoption into life sciences settings, and the impact it makes on patient services, support of healthcare providers, and operational efficiencies. The integration addresses critical use cases, including patient services programs, cell and gene therapy support, and comprehensive pharmaceutical support initiatives, while maintaining strict compliance with industry regulations such as HIPAA, GxP, and FDA 21 CFR Part 11.

KEY BENEFITS OF AGENTFORCE IN LIFE SCIENCES CLOUD

Enhanced Patient & HCP Support Experience

Advanced customer relationship management systems transform traditional support models by providing agents with comprehensive patient journey visibility directly within console interfaces. Healthcare organizations that use unified patient dashboards can achieve significant call handle time savings and improved first-call resolution rates when compared to using siloed solutions. The unified view allows the support team to see the entire patient journey, which enables personalized service and support across multiple communication channels (phone, chat, email, and self-service portals). The cross-channel consistency influences patient satisfaction metrics.

Real-time case update capabilities ensure contextual data remains immediately available, leading to faster and more accurate case resolution. Healthcare organizations report that real-time data synchronization substantially reduces case escalation rates and decreases patient wait times from industry averages. The platform's unified approach eliminates information silos that traditionally fragment patient interactions across different touchpoints, with data integration reducing duplicate data entry and improving overall data accuracy (Salesforce Healthcare & Life Sciences).

Accelerated Onboarding & Therapy Access

By optimizing onboarding processes using guided workflows, life sciences organizations gain substantial operational benefits. By using workflows to guide benefits verification, prior authorization, and reimbursement assistance, you can develop an approach to help your patients, particularly with high-cost specialty medications and new therapies. Automated workflow systems reduce the time to onboard patients for specialty therapies, which is an improvement reflected in time-to-treatment metrics.

Automation capabilities in these workflows materially improve the time from patient identification to treatment initiation, with automated prior authorization processing yielding better approvals on first submission than manual processes. In advanced therapy programs where timing is a critical success factor based on the relationship between outcome and timing, fast-tracking patient onboarding can make the difference between treatment success and a therapeutic opportunity missed.

AI-Driven Decision Support

With improved decision-support capabilities from advanced artificial intelligence integration, agent productivity increases, and the resulting outcomes of cases typically improve. Machine learning algorithms analyze historical patterns in a patient's data to recommend the best course of action, automate routine administrative tasks, and provide prescriptive insight into interactions, thoughts, and likely circumstances. Organizations that employ AI decision support can achieve great improvements in agent productivity and achieve large reductions in case resolution rates (Vora, L. K. *et al.*, 2023).

Advanced algorithms can leverage vast amounts of patient interaction data over time to build

predictive models to accurately identify patients who are at risk of discontinuation from the therapy. The ability for predictive analytics expedites support and intervention for at-risk patients and creates opportunities to enhance adherence rates and clinical outcomes, and subsequently reduce the overall costs associated with a program through early intervention protocols.

Compliance-First Case Management

Life sciences organizations, subject to compliance and regulatory requirements, can leverage built-in compliance tools that support HIPAA compliance for the healthcare sector or GxP and FDA 21 CFR

Part 11 compliance within the life sciences sector. The built-in compliance support ensures secure audit trails for every interaction and encrypted communications on every channel, resulting in high data integrity scores in regulatory audits.

Many compliance monitoring tools track a myriad of regulatory metrics in real time, with automated alerts avoiding most compliance failures before they occur. This seamless compliance system will reduce compliance-based incidents, decrease preparation time for regulatory audits, and maintain operational efficiency, quality, and performance through the automation and validation processes.

Table 1: Agentforce Benefits in Life Sciences Cloud Implementation (Salesforce Healthcare & Life Sciences, ; Vora, L. K. *et al.*, 2023)

Benefit Category	Key Capabilities	Operational Impact
Enhanced Patient Support Experience	360° patient journey visibility, unified dashboards, real-time case updates, cross-channel communication integration	Reduced call handling times, improved first-call resolution rates, elimination of information silos, enhanced patient satisfaction scores
Accelerated Therapy Access	Guided workflows, automated benefits verification, intelligent prior authorization processing, streamlined onboarding pathways	Substantial reduction in patient onboarding timeframes, improved time-to-treatment metrics, higher approval rates for specialty therapies
AI-Driven Decision Support	Machine learning algorithms, predictive analytics, automated task processing, behavioral pattern analysis	Enhanced agent productivity, reduced case resolution times, proactive patient intervention capabilities, improved adherence rates
Compliance Management	Built-in HIPAA/GxP/FDA compliance tools, secure audit trails, encrypted communications, and automated validation processes	Superior data integrity scores, reduced compliance violations, decreased regulatory audit preparation time, enhanced operational efficiency
Real-Time Analytics Integration	Comprehensive monitoring systems, automated alert mechanisms, performance tracking, and regulatory parameter monitoring	Prevented compliance violations, improved data accuracy, streamlined audit processes, and optimized resource allocation

TECHNICAL CAPABILITIES AND INTEGRATION FEATURES

Integrated Knowledge Management System

Advanced knowledge management solutions provide agents access to approved responses and therapy education materials from vast content libraries that are organized by therapeutic area and brand guidelines to ensure that what they provide to patients and/or healthcare providers is accurate, current, and contextually relevant.

Modern search and retrieval capabilities utilizing natural language processing technologies assist agents in finding relevant content with great accuracy and improved retrieval times, minimizing the amount of time spent retrieving information

without compromising on accuracy of content across therapeutic communications. Algorithms are developing continuously because of machine learning technologies to better guide content ranking and scoring relevance based on search habits (Shubham, S. *et al.*, 2024). Valuable version control technologies are tracking document changes with automatic approval workflows that help ensure that only approved content is available for support teams, maintaining compliance, and ensuring brand consistency with built-in compliance steps.

Utilization patterns show that agents refer to knowledge base resources when working with patients. While certain therapy areas such as

oncology, rare diseases, and immunology had the most frequent references, agents will pull knowledge base content regardless of the content library's therapy area. Real-time updates through redundant databases, state-to-state, always guarantee that information is appropriately collated regardless of geography or local regulations.

End-to-End Case Orchestration

Comprehensive case orchestration capabilities connect all facets of the support process, from initial intake to particular clinical engagement at the case level, to outcome resolution, along with managing large numbers of simultaneous cases across several treatment programs. This integrated tracking system ensures complete case visibility and efficient escalation handling when therapy interruptions or complications arise. Advanced workflow engines process extensive case transitions with automated status updates, maintaining exceptional case tracking accuracy while reducing administrative overhead significantly.

Intelligent routing systems go beyond traditional ticket management to offer advanced assignment algorithms that consider case complexity, agent expertise, and resource availability. Machine learning models analyze multiple case parameters to optimize assignment decisions and automatically escalate cases approaching service level thresholds or requiring specialized knowledge (Al-Amin, K. O. *et al.*, 2024). Predictive models identify delayed support in advance with a high degree of accuracy in

escalation predictions, and resource optimization algorithms balance workloads across support teams.

Integration dashboards display visibility for cases in their progression across multiple workflow stages, with automated alerts for when cases exceed the expected timeframe or have a clinical stall. Case complexity scoring systems evaluate multiple factors to establish routing pathways to a support team, allocating resources in an optimum manner by distributing workloads intelligently.

Comprehensive omnichannel coordination encompasses multiple channels of communication, including chatbots, live agents, texting/messaging, and web portal interactions, into comprehensive patient experiences. Better channel orchestration allows for seamless transitions between teams without losing context, allowing patients to never repeat any information or restart their support journey with the same provider across different communication channels.

Field service integration allows case management systems to dispatch clinical personnel directly and coordinates large monumental trips or field visits across regions.

Mobile access helps clinical teams and in-home service personnel have real-time access to patient information and case updates, even synchronizing offline when necessary to account for limited mobile network coverage in some areas.

Table 2: Technical Capabilities and Integration Features in Life Sciences Cloud (Shubham, S. *et al.*, 2024; Al-Amin, K. O. *et al.*, 2024)

Technical Capability	Key Features	Operational Benefits
Integrated Knowledge Management System	Natural language processing search, automated content validation, therapeutic area organization, version control workflows, real-time synchronization across regional databases	Significantly reduced information retrieval time, superior content accuracy rates, enhanced regulatory compliance, and consistent information delivery across geographic locations
End-to-End Case Orchestration	Comprehensive case tracking, intelligent routing algorithms, automated escalation systems, workflow optimization, predictive delay identification	Complete case visibility, efficient escalation handling, optimal resource utilization, reduced administrative overhead, improved case resolution accuracy
Omnichannel Communication Coordination	Unified patient experience across multiple channels, seamless context preservation, intelligent channel routing, mobile application integration, and automated handoff systems	Enhanced patient experience, eliminated information repetition, reduced response times, improved engagement rates, streamlined communication workflows
Field Services	Direct personnel dispatch systems, mobile	Coordinated field visits, enhanced clinical

Integration	access capabilities, offline synchronization, GPS-optimized routing, and real-time information access	team efficiency, improved service delivery, optimized travel routes, and comprehensive patient coverage
AI-Driven Analytics and Automation	Machine learning optimization, predictive modeling, case complexity scoring, resource allocation algorithms, automated workflow processing	Enhanced decision-making accuracy, proactive problem identification, intelligent workload distribution, improved operational efficiency, and data-driven insights

USE CASE EXAMPLES AND IMPLEMENTATION SCENARIOS

Patient Onboarding for Cell and Gene Therapy

Advanced service platforms coordinate complex onboarding processes related to cell and gene therapy programs. In addition to coordination and patient intake coordination, service platforms manage eligibility verification, consent management, and scheduling support, with coordination occurring across multiple stakeholder touchpoints. With regard to coordination, platforms ensure that patients receive access to life-saving therapies in an efficient manner by coordinating with treatment centers, insurance, and clinical teams. Stakeholder management is comprehensive because data conveying each patient's journey through numerous treatment centers, specialty pharmacies, and insurance providers is coordinated through secure API integrations.

Service platforms simplify patient eligibility verification where multiple points of criteria must be assessed. Automated screening mechanisms will automatically decrease upfront assessment timelines while maintaining a high degree of accuracy in eligibility verification. Additionally, the workflows of the platform manage routine tasks, while flagged exceptions will require human intervention, while machine learning algorithms will categorize more complicated instances for difficult manual review with high degrees of accuracy (Hexaware, 2024). Real-time status updates to allow integrated communication pathways to keep all stakeholders informed, allowing clinical teams to effectively prepare for treatment delivery times while minimizing anxiety for patients and their families.

Healthcare Provider Inquiry Management

Intelligent routing systems process extensive annual inquiries across multiple therapeutic areas when healthcare providers submit questions about dosing, drug interactions, or adverse events. Advanced platforms route these queries to appropriate product specialists or retrieve information from validated knowledge bases

containing comprehensive approved medical information documents. The system maintains detailed records of all healthcare provider interactions, supporting regulatory requirements and ongoing relationship management through comprehensive audit trails.

Advanced routing logic considers inquiry complexity, product specialization, and agent availability to ensure healthcare providers receive expert responses within appropriate timeframes, with routine inquiries receiving rapid responses and complex cases addressed efficiently. This capability remains particularly important for maintaining strong relationships with key opinion leaders and ensuring patient safety through rapid access to critical drug information (Foresee Medical).

Support for Infusion Centers and Clinical Sites

Modern platforms support real-time communication among infusion centers and clinical studies through integrated community portals for multiple active locations and across many geographic regions. Platforms allow for the secure exchange of information about patient scheduling, availability of medications, and treatment options, while still meeting HIPAA requirements of sound encryption and administrative, physical, and technical access controls. Scheduling optimization algorithms coordinate treatment appointments across multiple infusion centers, managing substantial monthly treatment session capacity. Integration with inventory management systems ensures appropriate medications and supplies remain available, tracking extensive pharmaceutical inventories with superior stock availability accuracy.

Clinical Trial Site Support

Comprehensive platforms provide seamless logging, tracking, and resolution of site issues across numerous active clinical trial sites managing multiple study protocols. The platform maintains detailed audit trails supporting regulatory submissions and trial integrity

requirements through immutable logging systems capturing extensive monthly data points.

Site coordinators can quickly report adverse events, protocol deviations, or supply issues through automated routing to appropriate clinical teams. Real-time dashboards provide trial managers with visibility into site performance and emerging issues requiring attention.

REMS and Risk Mitigation Programs

Advanced platforms ensure certified agents can communicate sensitive guidance securely and in compliance with FDA requirements across active

REMS programs. The system maintains comprehensive records of all educational interactions and generates reports required for REMS compliance, tracking extensive educational touchpoints annually.

Automated workflows ensure appropriate educational materials reach patients and healthcare providers, while tracking mechanisms verify required communications. This capability remains essential for maintaining market access for medications with restricted distribution requirements.

Table 3: Use Case Examples and Implementation Scenarios in Life Sciences Cloud (Hexaware, 2024; Foresee Medical)

Implementation Scenario	Key Features and Capabilities	Operational Outcomes
Patient Onboarding for Cell and Gene Therapy	Complex stakeholder coordination, automated eligibility verification, workflow automation with exception handling, and real-time status updates across multiple communication channels	Substantially reduced initial assessment timeframes, high accuracy in eligibility determinations, reduced patient anxiety, enhanced clinical team preparation efficiency
Healthcare Provider Inquiry Management	Intelligent routing systems, validated knowledge base integration, comprehensive interaction tracking, and advanced routing logic based on complexity and specialization	Rapid response times for routine inquiries, efficient handling of complex cases, maintained relationships with key opinion leaders, and enhanced patient safety through critical drug information access
Support for Infusion Centers and Clinical Sites	Real-time coordination through integrated portals, secure HIPAA-compliant communication, scheduling optimization algorithms, and inventory management system integration	Optimized treatment session capacity, superior stock availability accuracy, enhanced preparation efficiency, and proactive scheduling conflict resolution
Clinical Trial Site Support	Seamless issue logging and tracking, detailed audit trail maintenance, automated routing for adverse events and protocol deviations, real-time performance dashboards	Comprehensive regulatory submission support, efficient critical issue response, proactive enrollment challenge identification, and maintained trial integrity requirements
REMS and Risk Mitigation Programs	Secure FDA-compliant communication systems, comprehensive educational interaction tracking, automated workflow distribution, and compliance verification mechanisms	Enhanced REMS program compliance, verified communication completion, maintained market access for restricted medications, and comprehensive regulatory reporting capabilities

FUTURE IMPLICATIONS

Analytics and Performance Monitoring in Real-Time

By integrating advanced analytics into analytic applications, organizations will benefit from advanced functionality that allows case aging, service level agreement compliance, service trends, and regional performance to be tracked and reviewed within intuitive dashboard interfaces. These analytics platforms continuously monitor case resolution timeframes across multiple

therapeutic programs, with automated reporting systems generating customized performance reports for stakeholders at various organizational levels.

Dashboard systems track service level agreement compliance across different case categories while identifying performance bottlenecks through predictive analytics that forecast potential service disruptions well in advance. Regional performance monitoring encompasses multiple geographic markets, with comparative analysis revealing

significant performance variations between high-performing and developing regions, enabling targeted improvement initiatives (Maria Whitman, *et al.*, 2024).

These insights support continuous improvement initiatives and help organizations optimize resource allocation based on actual demand patterns and performance metrics, with machine learning algorithms analyzing seasonal demand fluctuations across numerous therapeutic areas. Performance trending analysis demonstrates substantial improvements in overall case resolution efficiency following analytics implementation, with notable cost-per-case reductions across participating organizations.

Scalability and Organizational Growth

Advanced service platforms demonstrate exceptional scalability across brands, regions, and therapeutic areas, with template replication systems enabling rapid deployment of proven configurations for new product launches compared to traditional implementation cycles. Organizations can clone proven templates for new product launches and regional rollouts, substantially reducing implementation time while ensuring consistency across operations through standardized workflow libraries.

Multi-brand management capabilities support organizations managing extensive pharmaceutical brand portfolios simultaneously, with shared resource optimization reducing operational costs through consolidated agent pools serving multiple therapeutic areas. This scalability particularly benefits large pharmaceutical companies managing multiple brands and growing biotechnology companies expanding their commercial operations, with modular architecture supporting concurrent deployment across numerous regional markets.

Future Implications and Industry Evolution

As the life sciences field transitions to new innovative therapies, personalized and targeted

care approaches, and value-based care models, advanced service platforms will be essential to industry value and operational success. Analysts in the industry expect an adoption rally by leading pharmaceutical companies in the coming years. Thanks to new AI and system integration capabilities, organizations will be able to adapt to shifting regulatory changes and patient expectations. Organizations have also developed predictive compliance models capable of identifying potential regulatory changes several months before the deadline with a high degree of accuracy.

Personalized medicine programs utilizing these platforms demonstrate superior patient engagement metrics, with customized communication strategies achieving substantially higher adherence rates compared to standardized approaches. The comprehensive approach to data integration and analytics supports the industry's growing focus on real-world evidence generation and patient outcome measurement, processing longitudinal data from extensive patient populations across multiple therapeutic areas (IQVIA, 2024).

STRATEGIC RECOMMENDATIONS

Organizations contemplating advanced platform implementation should address change management and training strategies so that platform benefits maximize their utility. Successful platform deployments typically require extensive training investment per user, with long implementation cycles. As the advanced platform can connect to existing systems, there is a basis for holistic digital transformation projects. Integration will ultimately have the impact of reducing the overall IT landscape complexity with improved data management and workflow orchestration, simplifying processes. Organizations can more effectively deliver personalized patient support, efficient interaction, and compliance.

Table 4: Future Implications and Strategic Considerations for Life Sciences Cloud Platforms (Maria Whitman, *et al.*, 2024; IQVIA, 2024)

Future Implication Area	Key Capabilities and Features	Strategic Outcomes and Benefits
Real-Time Analytics and Performance Monitoring	Sophisticated dashboard systems, automated reporting generation, predictive analytics for service disruption forecasting, regional performance monitoring, and machine learning demand analysis	Substantial improvements in case resolution efficiency, notable cost-per-case reductions, optimized resource allocation, targeted improvement initiatives, enhanced stakeholder visibility
Scalability and	Template replication systems, rapid	Reduced implementation time,

Organizational Growth	deployment capabilities, multi-brand management, shared resource optimization, modular architecture supporting concurrent deployment	consistent operations across regions, operational cost reduction through consolidated resources, support for portfolio expansion, enhanced market responsiveness
Industry Evolution and Personalized Medicine	AI capabilities for regulatory adaptation, predictive compliance models, customized communication strategies, real-world evidence generation, and longitudinal data processing capabilities	Superior patient engagement metrics, higher adherence rates, regulatory compliance accuracy, enhanced therapy effectiveness understanding, improved safety profile development
Digital Transformation and Integration	Comprehensive system connectivity, API-first designs, consolidated data management, streamlined workflow orchestration, third-party application integration	Reduced IT complexity, foundation for broader digital initiatives, enhanced operational efficiency, improved data accessibility, streamlined technology architecture
Strategic Implementation Recommendations	Comprehensive change management programs, training investment strategies, stakeholder engagement across organizational functions, process optimization initiatives	Higher user adoption rates, maximized platform benefits, enhanced organizational readiness, improved implementation success rates, sustained competitive advantage

CONCLUSION

The transformative potential of advanced service platforms in life sciences environments extends far beyond traditional customer service improvements, fundamentally reshaping how pharmaceutical and biotechnology organizations deliver patient support, manage healthcare provider relationships, and maintain regulatory compliance. These platforms enable life sciences organizations to create unified ecosystems that seamlessly integrate patient services, clinical support, and field operations while maintaining strict adherence to industry regulations. The comprehensive article on data integration and analytics supports the industry's growing focus on real-world evidence generation and patient outcome measurement, processing longitudinal data from extensive patient populations across multiple therapeutic areas. As the life sciences industry continues evolving with novel therapies, personalized medicine approaches, and value-based care models, advanced service platforms become increasingly critical to operational success. The sophisticated artificial intelligence capabilities and integration flexibility position organizations to adapt to changing regulatory requirements and patient expectations, with predictive compliance models achieving exceptional accuracy in identifying potential regulatory changes months before implementation deadlines. Organizations utilizing integrated platforms demonstrate superior patient satisfaction scores and improved medication adherence rates compared to traditional fragmented support systems. The strategic

implementation of these technologies requires comprehensive change management and training programs to maximize platform benefits, with successful deployments enabling organizations to build the operational foundation necessary for success in an increasingly complex and regulated industry landscape that demands personalized, efficient, and compliant patient support across global markets.

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