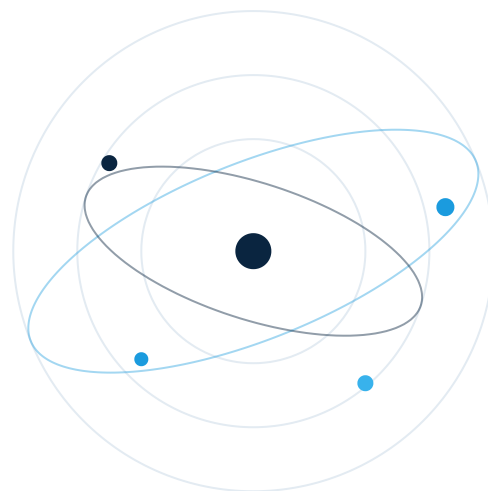


AGENTFORCE FOR SALES

Your pipeline, running as an autonomous revenue engine.

Agentforce puts trusted, CRM-grounded AI agents to work across the entire sales motion — from first touch to closed-won. We design, govern, and ship them so they behave exactly the way your revenue team needs.

● Agentforce-native capability ● AgentforceHQ custom build



01 What Salesforce gives you out of the box

Agentforce for Sales

SDR / LEAD NURTURING

24/7 outreach & qualification

Engages new and updated leads with personalised first emails, follows up, answers product questions, handles objections, books meetings on the rep's calendar, and hands off qualified prospects.

SALES COACH

Deal-specific role-play

Runs autonomous role-plays tailored to the deal and stage, simulating a buyer and giving objective, RAG-grounded feedback on pitch, objections, and negotiation — judgement-free, on demand.

PROSPECTING

Prioritised target lists

Generates a ranked list of accounts and contacts, synthesising calls, meetings, and email history with third-party research so reps spend time on the leads most likely to convert.

ACCOUNT RESEARCH

Account intelligence on demand

Compiles a briefing on any account — CRM history, open opportunities, recent activity, and external signals — into one summary before every call, so reps walk in prepared.

PIPELINE

Pipeline that manages itself

Keeps opportunities current — flagging stalled deals, surfacing risk and next steps, updating fields from conversation, and keeping forecasts honest without manual hygiene.

SALES INTELLIGENCE

Scoring & insights

Einstein lead and opportunity scoring, conversation insights, and forecasting surface where deals are healthy, where they're slipping, and where attention earns the most pipeline.

AGENT BUILDER

Custom sales agents

Low-code Agent Builder plus Agent Script let you tailor OOTB agents or compose new ones from Topics, Subagents, Flows, Prompts, Apex, and MuleSoft APIs — for any sales use case.

CHANNELS

Meet sellers where they work

The same agent reaches across Slack, email, web, mobile, and Agentforce Voice — so outreach, coaching, and CRM actions live inside the rep's existing flow of work.

Grounded, governed, and reasoned — not a bolt-on chatbot

Atlas Reasoning Engine · Hybrid Reasoning

Data 360 grounding · RAG

Einstein Trust Layer · PII masking · ZDR

Prompt Builder

Multi-Agent Orchestration

Model choice · Anthropic · OpenAI · Gemini

Testing Center & Observability

02 From sales problem to shipped solution

Where agents earn their keep

THE PROBLEM

Leads go cold before anyone replies

Reps answer in hours or days; leads that arrive after hours sit untouched and lose intent.

THE SOLUTION

SDR / Lead Nurturing Agent

An always-on agent **replies in seconds**, qualifies, answers questions, and books the meeting — then hands a warm, context-rich prospect to the right rep.

THE PROBLEM

Coaching doesn't scale

Reps walk into high-stakes deals under-rehearsed; managers can't run enough 1:1 practice.

THE SOLUTION

Sales Coach Agent

On-demand **role-plays grounded in the actual deal and stage**, with objective feedback after — every rep rehearses objections and negotiation before the real call.

THE PROBLEM

Hours lost to manual research

Sellers stitch together CRM history and outside signals by hand before deciding who to chase.

THE SOLUTION

Prospecting Agent

Synthesises activity and third-party data into a **ranked, ready-to-action target list**, so prospecting starts with the highest-probability accounts.

THE PROBLEM

Rigid CRM data entry

Standard create-record forms reject imperfect input and break the seller's conversational flow.

THE SOLUTION

Conversational write-layer agent

A governed Employee Agent **creates and updates records by conversation**, with confirmation gates that keep bad data out of the database. → *see Sales agent for Sellers.*

CUSTOM BUILD

Sales agent for Sellers

Employee Agent · governed CRM write-layer

PROBLEM

Sellers and ops needed to create leads, convert them, and spin up opportunities **without fighting rigid forms**. Native validation rejected real-world input, and agents kept getting stuck mid-conversation.

WHAT WE BUILT

A multi-subagent Employee Agent — **Lead Creation, Conversion, Opportunity Creation, General CRM, and summarisation** — with strict action ordering, intent-priority overrides, anti-loop guards, confirmation gates, and deterministic Flow validation. Deployed in Slack.

OUTCOME

Conversational record operations with a **zero-garbage-to-DB** guardrail layer, validated by an 86-case Testing Center suite — a reusable governed write pattern.

Agent Builder

Subagent routing

Screen Flows

Apex validation

Slack channel

Testing Center

CUSTOM BUILD

Content Parser

Opportunity-grounded · prompt + flow automation

PROBLEM

Sales teams burned **hours hand-assembling client RFP responses** from scattered opportunity and account data — slow, inconsistent, and off-brand under deadline.

WHAT WE BUILT

An Einstein Prompt Builder template **grounded on the Opportunity and its related records**, fired by a one-click Screen Flow. Output is generated client-ready and delivered as a **PowerPoint via Microsoft Graph / OneDrive**.

OUTCOME

Client-ready, data-grounded RFP output in **minutes, not hours** — fully Trust-Layer compliant. A service-style process solving a purely sales deliverable.

Prompt Builder

RAG grounding

Screen Flow

Microsoft Graph API

Einstein Trust Layer

CUSTOM BUILD

Weekly AI Leadership Briefing

Exec insight · Slack Canvas · MCP + Claude

PROBLEM

Leadership had no single, current view of GTM health. Pulling accounts, opportunities, deals, and contacts into a weekly picture meant hand-built reports that were stale by Monday.

WHAT WE BUILT

An automated weekly briefing that synthesises accounts, opportunities, deals, and contacts into a **visual dashboard** — delivered as a **Slack Canvas**, or as an interactive, **MCP-connected Claude workspace** where leaders ask in plain language ('*why did revenue dip?*', '*why isn't this account scaling?*') and get grounded, data-backed answers.

OUTCOME

A self-updating, conversational view of the business every week — **insight on demand, not a static report** — with every answer traceable to live CRM data.

Data 360

Prompt Builder

Slack Canvas

Salesforce MCP

Claude

Scheduled Flow

CUSTOM BUILD

AI-Powered Sales Signals

GTM strategy · real-time guidance

PROBLEM

Sellers and managers couldn't tell, in the moment, which accounts and opportunities needed attention — or how their go-to-market strategy was actually playing out across the pipeline.

WHAT WE BUILT

An agent that continuously analyses **go-to-market strategy against live account and opportunity data**, then pushes **real-time, prioritised suggestions** — next best action, at-risk deals, and where to focus — to the people who can act on them.

OUTCOME

An always-on strategic co-pilot for revenue — GTM decisions guided by **current signals**, not last quarter's report.

Data 360

Einstein

Agent Builder

Real-time signals

Flows



GET IN TOUCH

Let's talk about what you're trying to ship.

Tell us the problem you're trying to solve. We'll tell you straight whether it's a two-week assessment or a full build — and exactly how we'd approach it.

REACH US

Start a conversation

WEB

agentforcehq.in

EMAIL

tars@agentforcehq.in

04 How we work

Fixed-scope, outcome-shaped

Assess

Readiness & architecture blueprint with a sequenced delivery plan.

Build

The agents, data grounding, channels, and guardrails — production-ready.

Govern

Trust Layer, auditable routing, and Agent-to-Agent integration.

Partner

Specialist Agentforce support for implementation partners.