

Dreamhouse Agent Project: Development Kickoff

1. Project Overview

This project aims to build an intelligent, scalable Salesforce agent for Dreamhouse, enhancing both internal (employee) and external (customer) interactions. The agent will leverage Salesforce Agentforce, Salesforce Data Cloud (RAG), and external API integrations to provide context-aware information, automate tasks, and improve user experiences.

2. Key Technologies

- **Salesforce Agentforce**
- **Salesforce Data Cloud (RAG)**
- **External APIs:**
 - Walk Score (Neighborhood Information)
 - Mortgage Rate APIs
 - Salesforce Slack App (Internal Users)
 - Salesforce Experience Cloud (External Users)
- **Salesforce Platform**

3. Data Sources

- Salesforce Data (Properties, Clients, Opportunities, etc.)
- "Dreamhouse Property Listing Guidelines & General Terms" (PDF)

4. Core Use Cases

4.1. Internal User (Dreamhouse Employees) - Slack Agent

Property Information and Updates

- Retrieve new listings, price changes, property summaries, open house schedules
- Access listing requirements and rules (Data Cloud RAG)

Client Information and Interactions

- Retrieve client inquiries, contact details, offer statuses
- Automate follow-up reminders
- Retrieve client requirements and financial information

Salesforce Data Retrieval

- Query open opportunities, contacts, tasks, cases, Property, **Broker**

Automated Reminders and Notifications

- Send meeting reminders, offer notifications, daily listing summaries
- Send alerts based on client activity

4.2. External User (Dreamhouse Customers) - Chat/Portal Agent

Property Search and Information

- Search properties by criteria (price, location, features)
- Retrieve property details, images, neighborhood information
- Retrieve property history and commute information

Tour Scheduling

- Schedule and reschedule property tours
- Retrieve tour availability

Status Tracking

- Track offer status, tour confirmations, closing progress

Neighborhood and API Information

- Retrieve school ratings, walk scores

5. Development Requirements

Data Cloud Utilization

- Data Cloud will be used for RAG of the document titled "Dreamhouse Property Listing Guidelines & General Terms"

API Integrations

- Integrate external APIs for neighborhood information
- Implement secure API key management and error handling

Agents Development

- Create Agentforce agents for internal and external use with context awareness and rich media
- Design dialog flows for each use case
- Implement fallback mechanisms and seamless handoff to human agents (Omni-Channel)

Salesforce Slack App Integration

- Develop Slack workflows for internal users assistance
- Integrate Agentforce agents with Slack
- Ensure proactive notifications are implemented

Experience Cloud Portal Development

- Develop a user-friendly portal with property search, tour scheduling, and document access
- Optimize portal performance
- Ensure portal is optimized for accessibility

Security and Compliance

- Implement data masking, audit logging, and compliance with data privacy regulations
- Secure API keys

Performance and Scalability

- Optimize code and Flows for scalability and performance
- Handle asynchronous tasks using Salesforce Queues and Platform Events

Monitoring and Maintenance

- Implement detailed analytics and error logging
- Develop a version control and disaster recovery plan
- Implement anomaly detection

Data Governance

- Establish data governance policies
- Address ethical considerations

A/B Testing

- Implement A/B testing for dialog flow optimization

6. Deployment and Testing

- Use Salesforce DX for deployment
- Develop comprehensive test plans
- Conduct thorough user acceptance testing

7. Success Metrics

- Reduced agent response time
- Increased user satisfaction
- Improved task completion rates
- Decreased manual effort

8. Key Deliverables

- Functional Salesforce Agentforce application
- API integration documentation
- Agentforce agent dialog flows and training data
- Experience Cloud portal design and implementation
- Deployment and maintenance plan