

salesforce

Agentforce Playbook



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Introduction



We're currently experiencing a transformative era with AI, much like the way the internet revolutionized daily life in the 1990s. Every day, companies are looking for new ways to harness AI to improve services, streamline operations and stay ahead in a fast-paced market.

Tapping into a big opportunity

That's where Agentforce comes in, uniting humans, AI, data and CRM to deliver unprecedented support for customers and employees. In a recent survey, 82% of large companies said they plan to implement AI agents by 2027, representing a huge opportunity for Agentforce.

Using this playbook

This playbook was designed to help you sell Agentforce to businesses. It'll equip you with all the information, best practices and content you need to successfully run Agentforce campaigns.



Campaign overview



Objective

Showcase how quickly and easily businesses can integrate AI Agents to enhance customer and employee experiences.

While the ultimate goal is to generate leads and drive Agentforce adoption, we recommend focusing on two or three KPIs.

- Leads generated
- Website visits
- Prospects generated
- Landing page traffic
- Social media engagement
- Email open rate
- Email replies
- Free trial sign-ups

Campaign overview



Best practices

Adapt the value proposition

Add unique perspective to connect better with your audience.

Be specific

Consider segmenting and tailoring content to your audience's challenge for more personalized, impactful messaging.

Deliver value

Drive to useful resources like blogs and videos where possible, incorporating key statistics and customer stories.

Multiply

Run various campaigns with different themes to reach a broader audience and drive engagement.

Be prepared

Ensure all assets are ready before your campaign launch to avoid delays and reduce workload during execution.

Align with sales

Coordinate with Sales to gain insights on leads, agree on demo dates, and share relevant content to engage prospects already in the sales process.



Target audience



The target audience for Agentforce are decision makers and C-level executives across various industries.

Organizations who want to:

- Resolve customer queries 24/7 based on trusted, real-time data
- Engage with prospects, autonomously answering questions, handling objects and booking meetings for sales reps
- Support employees with a personal sales coach that'll give feedback and actionable steps to advance deals, all grounded in CRM data
- Offer personalized product recommendations through websites or Whatsapp
- Create and optimize marketing campaigns faster, from generating briefs to building customer journeys in Flow

Pain points:

- Difficulty in handling high volumes of inquiries
- Lack of data to deliver personalized customer experiences
- Data privacy and compliance concerns
- Poor coordination between automated systems and human agents

Target personas

- VP of Sales, Head of Customer Service, Director of Operations, CTO
- Industries: Tech, finance, retail, healthcare, or any customer-focused enterprise
- Responsibilities: Managing teams, improving customer experience, driving sales and optimizing operations

Goals

- Provide faster, more personalized and data-driven customer experiences
- Leverage AI without disrupting workflows or relying on IT resource
- Scale operations quickly and cost-effectively
- Seamless integration with existing tools



Campaign approach



This six-week marketing campaign uses a layered approach, taking advantage of all available channels, with the goal of driving the first sales call.



Key messaging



This campaign messaging should underpin all campaign assets. The ultimate goal of all messaging is to instantly communicate Agentforce's value while generating excitement among the time-poor target audience.

Easy to deploy

In just a few clicks, you can spin up pre-built, autonomous agents to execute specialized tasks for sales, service, marketing, commerce, and more.

Integrated

With Data Cloud, you can create the most intelligent agents because they can have access to the right data for the right employee or customer experience.

Customizable

With Agent Builder you can customize Agents with existing Salesforce Platform capabilities including flows, apex code, prompt templates and MuleSoft APIs.

Secure

The Agentforce Trust Layer features a zero retention architecture for using external LLM providers like OpenAI. It includes TLS encryption, secure data grounding, toxicity detection and data masking for enhanced security.

Campaign assets



Here are assets that can support your campaign. Hero content and creative assets can be found in the Go To Market (GTM) Resources App.

Nurture email sequence

Give a top-level introduction, deep dive into product features and share customer story.

Social media kit

1 x LinkedIn sponsored ad
3 x LinkedIn organic posts

Case study template

Showcase a customer's story, including challenges, opportunities and results.

First call script

Demonstrate Agentforce benefits as they relate to the specific prospect's business and discuss next steps for implementation.

Services overview template

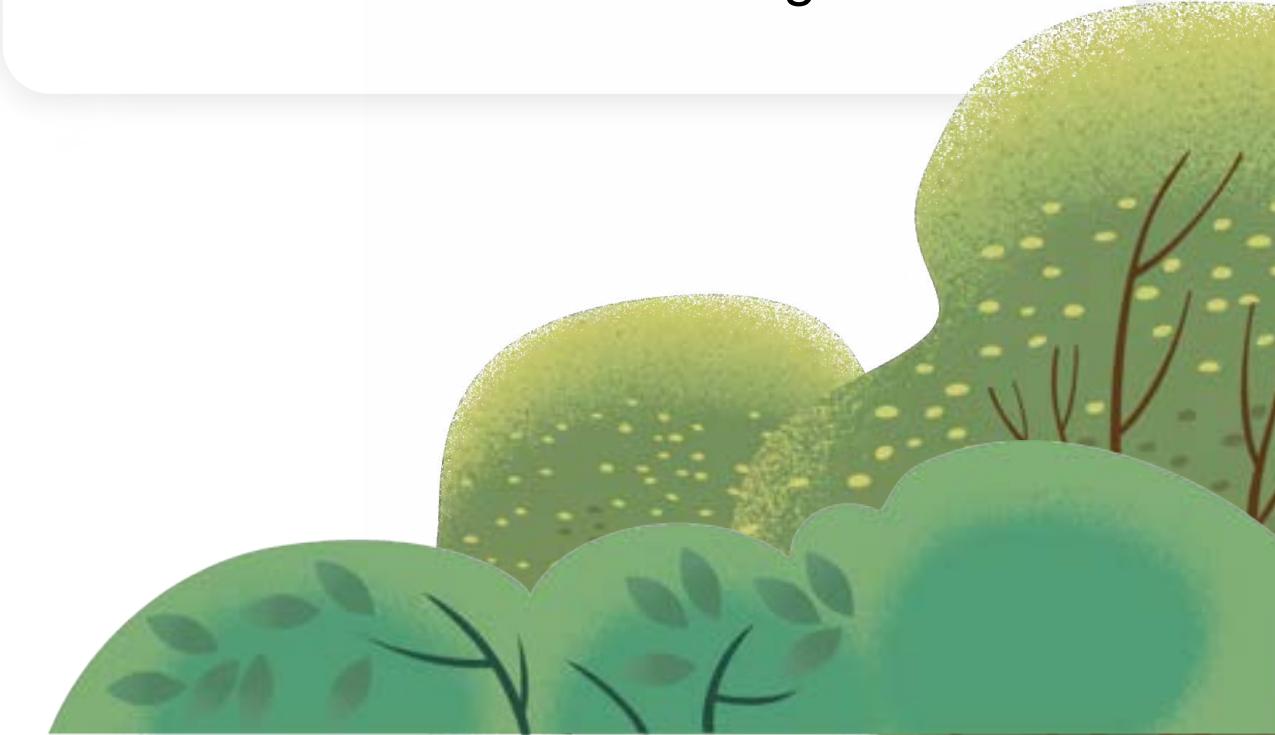
Share key services, explain how you work with Salesforce and curate tailored resources.

Industry use case template

Quickly create personalized industry use cases, outlining how Agentforce can solve common challenges.

Landing page

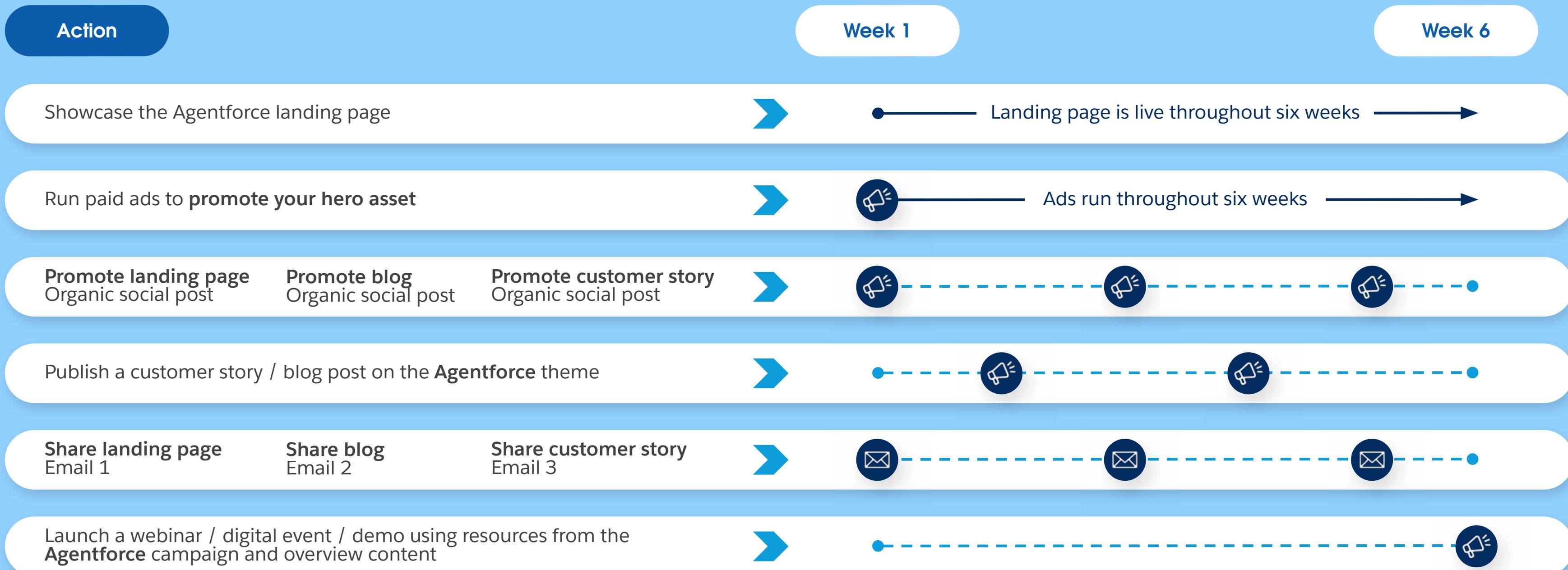
Highlight key features like seamless integration, automation and customization.



Campaign flow



This six-week marketing campaign uses a layered approach, taking advantage of all available channels, with the goal of driving the first sales call.



Campaign timeline



Week 1

Week 2

Week 3

Week 4

Week 5

Week 6

Agentforce landing page is live

Begin LinkedIn campaign
Send first email

Publish first organic post
Continue LinkedIn campaign

Send second email
Continue LinkedIn campaign

Publish second organic post
Continue LinkedIn campaign

Send third email
Continue LinkedIn campaign

Publish third organic post
Continue LinkedIn campaign



Helpful resources



Landing pages

- [Agentforce campaign page](#)
- [Agentforce and Appexchange page](#)
- [Agentforce product demo sign-up](#)

Video

- [Agentforce Keynote, Dreamforce 2024](#)
- [What is Agentforce?](#)

Press releases

- [Salesforce Unveils Agentforce](#)
- [Introducing Agentforce Partner Network](#)

Reports

- [State of the AI Connected Customer Report](#)
- [CIO's AI Dilemma Research Report](#)

Blogs

- [How the Atlas Reasoning Engine Powers Agentforce](#)
- [5 Myths About Autonomous Agents](#)
- [AI Agents: The Future of Business Applications](#)
- [Why Purpose-Built Agents are the Future of AI at Work](#) (blog)

Customer stories

- [Wiley sees 213% return on investment with Salesforce](#)
- [OpenTable boosts customer service with Agentforce](#)
- [Saks elevates luxury shopping with unified data and AI Service Agents](#)

Guides

- [Prompt Builder Guide](#)
- [Implementation Guide](#)

Log your leads



All leads should be logged in the Partner Community for review by the Sales Development Team to receive lead credit. When logging leads from this process, also mention your use of this asset.

1. To get started, visit the Partner Community – Business Page [\[https://partners.salesforce.com/PartnerBusiness\]](https://partners.salesforce.com/PartnerBusiness)
2. Submit your lead form with as much information as you have
3. Consult the [FY24 Salesforce Partner Program policy](#) for information on referrals and sourced opportunities

The screenshot shows the Salesforce Partner Community Business page. At the top, there are three main sections: 'Leads', 'Opportunities', and 'Projects'. Each section contains a flow diagram and a brief description. The 'Leads' section shows a flow from 'Submit your first lead' to 'Convert Opportunity' and then to 'New Project'. It includes a note about ACV Credit and Referral Fee (if applicable). The 'Opportunities' section shows a flow from 'Customer Opportunity' to 'New Project'. It includes a note about ACV Credit and External Fee (if applicable). The 'Projects' section shows a flow from 'Submit Project' to 'New Project'. Below these sections is a large 'Details' form for submitting a lead. The form fields include:

- Primary Product of Interest: A dropdown menu labeled 'Select a Product'.
- Additional Products of Interest: A dropdown menu labeled 'None selected' with an 'Edit' link.
- Purchasing Timeframe: A dropdown menu labeled 'Select a timeframe'.
- Total Potential Users: A dropdown menu labeled 'Select One'.
- Potential Sale Value: A dropdown menu labeled 'Select a Value'.
- Are you working with a Salesforce account executive?: An input field with placeholder 'Enter account executive name'.
- Is this lead associated with a Salesforce campaign?: An input field with placeholder 'Enter 16-digit Campaign ID'.
- A checkbox for 'We plan to use third parties (subcontractor, intermediary, etc.) to assist with the sale of salesforce.com products and services.'

At the bottom of the form are three buttons: 'Cancel', 'Save Draft', and 'Save and Submit'.

Key Agentforce Slides

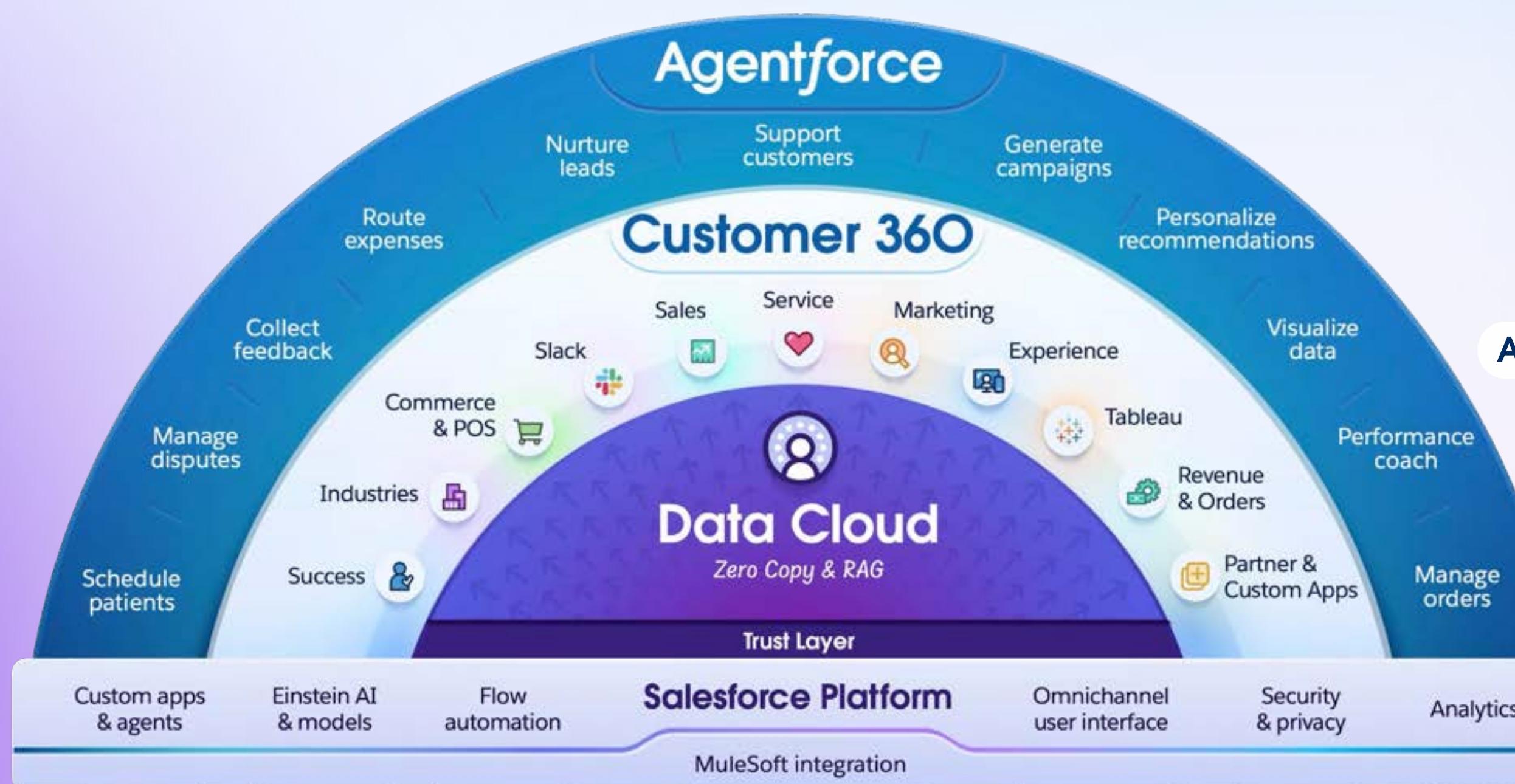


Here are a few key slides from the Agentforce First Call Deck that could be valuable for any brief presentations.

For more, check out the GTM Resources App or the Agentforce campaign Zip file.



Agentforce Your Digital Labor Platform

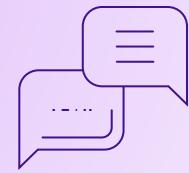


Deploy agents across your business to become a credible reference



Sellers

Engage with prospects 24/7 to nurture pipeline



Service reps

Support customers autonomously 24/7 with natural responses



Marketers

Create campaigns, audience segments, content, and customer journeys



Commerce

Answer order-related questions and take action to manage orders and returns



Human resources

Field internal employee requests and answer policy-related questions



IT & Engineering

Escalate system outages and highlight risks



Finance

Automate invoice processing and flag fraud risks



Product

Support bug identification and performance testing

New



PARTNERS | COMMUNITY | SALESFORCE

AgentExchange

The trusted Agentforce marketplace, built into Salesforce

Customers deploy Agentforce faster with hundreds of pre-built actions, topics, and templates

Partner actions, topics, and templates surfaced directly in Agent Builder

Platform for building, marketing, and selling Agents

Agentforce Prompts, Topics & Actions

GA | Now

Agentforce Templates

GA | April

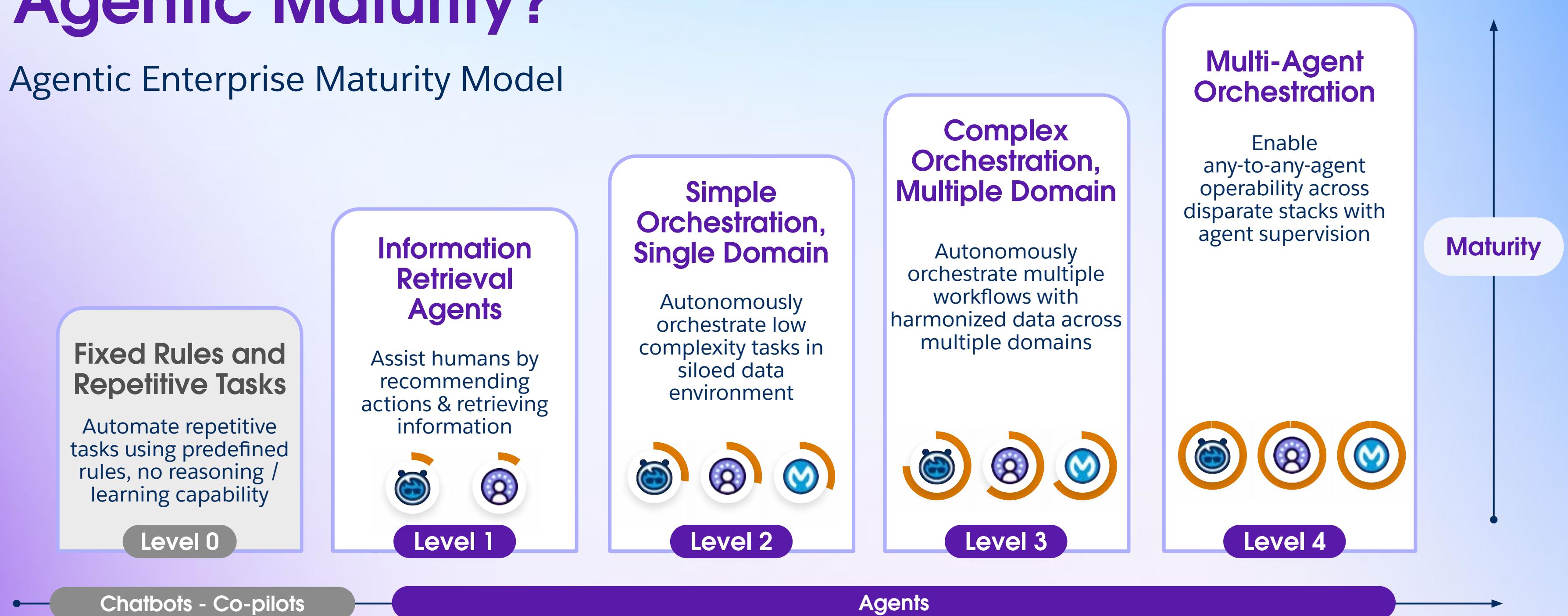
The screenshot shows the Salesforce AgentBuilder interface with the AgentExchange modal open. The modal has a search bar at the top asking "What would you like your agent to do?". Below the search bar is a filter section with tabs: All, Featured, Finance, Human Resources, Resource Planning, Sales, IT, and Customer Service. There are six items listed in the modal:

- Box for Agentforce** By Box (Rating: 5.0 (22))
Extract insights from your unstructured data and use natural language to interact with your content in Box.
Collaboration, Document Management
3 skills, 7 topics, 15 actions
- Docusign for Agentforce** By DocuSign (Rating: 4.84 (70))
Generate agreements, route for signatures, track status, and gain key insights — automating workflows and boosting efficiency.
E-signature, Document Generation
5 topics, 35 actions
- Honeywell for Agentforce** By Honeywell (Rating: 4.9 (11))
Automate complaint intake and routing for Agentforce Service Agents.
Service
12 actions
- Agent Labs** By Salesforce (Rating: 4.7 (23))
Pre-built skills, topics, and actions from the AgentBlazer community.
Cross-Industry
10 skills, 24 topics, 46 actions
- Gemini for Agentforce** By Google (Rating: 4.9 (90))
Ground agents with Google Search via Vertex AI and with the ability to reference up-to-the-minute data, news, and current events.
Search, Cross-Industry
9 actions
- Workday for Agentforce** By Workday (Rating: 5.0 (12))
Streamline critical employee self-service workflows such as onboarding, benefits management, and career development, freeing up HR teams and significantly re...
HR, Finance
5 skills, 12 topics, 20 actions

At the bottom of the modal is a text input field labeled "Describe your task or ask a question..."

Where are your customers on their Agentic Maturity?

Agentic Enterprise Maturity Model





Thank you

