Dreamforce 2026

Create a High-Touch Relationship Experience with Agentforce

Hands-On Workshop – Attendee Guide

Table of Contents

Disclaimer: This workshop uses a pre-configured Salesforce demonstration environment ("org"). The data, companies, people, and scenarios depicted in this guide are fictional and used for illustrative purposes only. Any resemblance to real persons, companies, or events is purely coincidental.

The features and functionality shown in this session reflect capabilities available at the time of Dreamforce 2026. Salesforce product capabilities, pricing, and availability are subject to change. This content does not constitute a binding commitment by Salesforce to deliver any feature, functionality, or enhancement.

Attendees explore and validate pre-staged configurations. This is not a from-scratch build session. Screenshots in this guide may differ slightly from what you see on screen due to org configuration or release updates.

Session Overview

Session Title: Create a High-Touch Relationship Experience with Agentforce
Sector: Banking, Wealth and Asset Management, and Insurance
Focus Area: Meeting Lifecycle
Abstract: Stop building from scratch. In this hands-on workshop, configure and deploy Agentforce to deliver faster, smarter relationship management workflows for financial services institutions.
Duration: 60 Minutes
Format: Hands-on exploration in a standard FSC org

Segment	**Time (mins)**
Welcome & Orientation	2
Agentic Relationship Management Orientation	5
Module 1: Salesforce Go (Setup)	5
Module 2: Annual Review Playbook	5
Module 3: Out of the box flow	5
Module 4: Create first meeting playbook	10
Module 4: Customization	20
Wrap-Up & Q&A	3

Welcome & Orientation

Welcome to the **Relationship Experience Hands-On Workshop** at Dreamforce 2026!

Here's what this session will cover today: **transforming your client relationship workflows** – and the tools to get you there:

- **Demo org** – a standard FSC org environment ready for you to explore
- **This workbook** – your step-by-step guide through every module

In this session, you will explore Salesforce's **Meeting Concierge** (a capability of Agentic Relationship Management) – a purpose-built solution that transforms the client meeting lifecycle by automatically preparing bankers, advisors, and insurance wholesalers and brokers with full client context, capturing real-time interactions, and automating next steps.

What to Expect:

- Your FSC org is **pre-staged** – no setup required from you
- You are here to **explore, configure, and validate**, not build from scratch
- Follow the steps in this guide at your own pace; facilitators are here to help
- Screenshots are provided as reference – your screen may vary slightly

Org Access: You will sign up for an org using this link and the org code listed on the screen. Wait up to 10 minutes for an email to log into the org. Then, click on the link in the email to activate the org.

Having trouble logging in? Raise your hand and a facilitator will assist you. Do not spend more than 2 minutes on login – we want you exploring, not troubleshooting.

Scenario: Meet Northwind Wealth

Northwind Wealth is a mid-size advisory firm serving high-net-worth households. Like many firms today, Northwind is dealing with:

- Advisors spending hours prepping for client meetings across disconnected systems
- Client context scattered across custodians, planning tools, and CRM
- Manual, inconsistent post-meeting follow-up and next steps
- Growing client expectations for a high-touch, personalized relationship experience

Northwind has activated Agentforce, but their agents are sitting dormant – turned on, but not yet embedded in how advisors actually work. They've chosen **Agentic Relationship Management for Financial Services** to close the gap between *activated* and *adopted*.

Your role today: You're a Salesforce administrator and business analyst at Northwind. You've been tasked with configuring and deploying **Meeting Concierge** across the client meeting lifecycle before rollout to the advisory team. Let's get started.

Note: This workshop uses a wealth management scenario (and a Wealth Management playbook) to walk through Meeting Concierge, but Meeting Concierge itself is sector-agnostic: the same pre-meeting prep, in-meeting guidance, and post-meeting follow-up workflows can be configured for banking (e.g. a commercial banker) or insurance (e.g. insurance broker). If your firm sits in banking or insurance, everything we will walk through in this guide can be configured to your own client meeting workflows with customizations specific to your needs.

Platform Orientation: The Agentic Relationship Management for Financial Services

Before diving in, let's orient ourselves to what you'll be building with today.

Meeting Concierge is part of the broader Agentic Relationship Management for Financial Services, which is Salesforce's purpose-built solution for transforming how financial services firms manage client relationships. Today we're focusing on Meeting Concierge: the capability that transforms how teams prepare for, run, and follow up on every client meeting.

Here's what Meeting Concierge does across the meeting lifecycle:

- **Pre-Meeting:** Turn hours of meeting prep into seconds. Meeting Concierge automatically gathers full client context – holdings, life events, open action items, and recent interactions – so you walk in ready, every time.
- **In-Meeting:** Keeps you focused on the client, not the screen. Meeting Concierge captures the conversation in real time and surfaces live, data-backed recommendations as topics come up: identified risks, cross-sell signals, next best actions.
- **Post-Meeting:** Eliminate the post-call busywork. Meeting Concierge auto-generates meeting notes, updates records, and drafts personalized follow-ups, so nothing slips and you stay focused on relationships.
- **Meeting Management:** One hub for the full meeting lifecycle. Past meetings, upcoming conversations, open actions, and conversation history all in one place, with no swivel across systems.

The result: you spend less time on administrative work and more time on what actually drives client loyalty: the relationship itself.

Setting Up Meeting Concierge

Overview

This segment showcases how fast it is to stand up Meeting Concierge in the platform without any complex setup menus or development required. Using the guided setup wizard, you'll activate prebuilt workflows, agents, and actions and connect your ecosystem in minutes.

Topics covered in this demo:

- Getting started with the guided setup wizard
- Activating prebuilt workflows, agents, and actions to deploy
- Configuring workflows, prompts, and playbooks

What You'll See

Your facilitator will walk through setting up Meeting Concierge in the AFS trial org. Watch for:

1. How the **guided wizard** steps you through setup and the options available at each step
2. How prebuilt **workflows, agents, and actions** activate and deploy
3. The speed advantage vs. manual configuration: what used to take days now takes minutes

✓ **Key Takeaway:** Agentforce doesn't just power the client conversation, it supercharges your entire workflow. Prebuilt capabilities make deployment faster, more accurate, and accessible to non-developers.

Module 1: Salesforce Go (5 mins)

Overview

In this module, you'll turn on Meeting Concierge using the guided Salesforce Go setup, no manual configuration required. You'll activate Einstein for your org and confirm who has access to the tool.

Step 1: Find Meeting Concierge in Salesforce Go

1. From Setup, search for and click **Salesforce Go**
2. Search for **Meeting Concierge**

If you see a lock icon next to Meeting Concierge, your org doesn't have the required licensing. Check with your facilitator before continuing.

Step 2: Turn On Einstein

1. Click **Get Started**
2. Click **Turn On Einstein** (This should already be turned on)

Step 3: Confirm User Access

Your admin user (OrgFarm EPIC) should be **added automatically**. To add additional users to gain access to **Agentforce for Financial Services**:

1. Click **Manage**
2. Change the dropdown from Recently Viewed to **All Users**
3. Check the box next to the user you want to add
4. Click **Assign** for **Einstein for Financial Services**
5. Click **Done**

✓ **Checkpoint:** Is Einstein toggled on and is your admin user listed under Meeting Concierge access? If yes, you've completed Module 1.

Module 2: Annual Review Playbook (5 mins)

Overview

In this module, you'll clone the out-of-the-box (OOTB) Meeting Playbook: Annual Review, so you can use Meeting Concierge without needing to make any changes.

Step 1: Start the Clone

1. Beside **Creating Meeting Playbooks**, click **Go To Setup**
2. You should see 2 OOTB Playbooks: **Annual Review** and **Prospecting**
3. Use the dropdown and click **Clone** to use the OOTB option for **Annual Review**

Step 2: Name and Save

1. For the name, type **Annual Review** because we are cloning the Annual Review Playbook
2. The developer name will **automatically prefill as Annual_Review**
3. Click **Save and Next** to advance to the Meeting Stages
4. Click **Save and Next (Pre-Meeting Preparation)**
5. Click **Save and Next (In-Meeting Facilitation)**
6. Click **Save and Next (Post-Meeting Follow-Up)**
7. Click **Save and Next** to advance to the Permission Set Page
8. Check the box beside the permission set that should be able to access this playbook (you can choose **Einstein for Financial Services**)
9. Toggle on **Active Playbook**
10. Click **Save**

Note: Make sure the Developer (API) name is "Annual_Review". If you change these names, you'll need to edit the record-triggered flow later on.

✓ **Checkpoint:** Have you cloned and named your playbook? If yes, you've completed Module 2.

Module 3: Out of the Box Flow (10 mins)

Overview

In this module, you'll activate the flow that automatically creates a Meeting Playbook whenever a calendar event is created, so meetings are generated out of the box with no manual setup.

Step 1: Activate the Annual Review Playbook

1. Go to **Salesforce Go → Meeting Concierge**
2. Beside **Customize the Meeting Creation Flow**, click **Go to Setup** and then scroll to **Meeting Concierge: Create Meeting From Event**
3. Click **Save As New Flow**
4. Name the flow something like **Meeting Concierge: Create Meeting from Event**
5. Click **Save**
6. Click **Activate**

Note: You can name the flow whatever you want and it will override the original name.

✓ **Checkpoint:** Do you have a fully saved playbook, with the right permission set access? If yes, you've successfully explored Module 3.

Module 4: Create First Meeting Playbook (10 mins)

Overview

In this module, you'll launch Agentforce Meeting Concierge, trigger your first meeting by creating a calendar event, and walk through a full meeting playbook, including uploading a document and generating an AI summary.

Step 1: Launch Meeting Concierge

1. Click **App Launcher**
2. Search **Agentforce Meeting Concierge**

Step 2: Create an Event to Trigger the Flow

In order to trigger the OOTB flow, you'll need to create an event from scratch:

1. Click **App Launcher**
2. Search **Calendar**
3. Click **New Event** for today (this is important for it to be **TODAY**)
4. Under **Related To** choose **Accounts** from the dropdown and search for **Rachel Adams**
5. Type in any **Subject**
6. Click **Save**

If your Create Meeting from Event flow is active (Module 3), it will have created a Meeting.

Step 3: Open Your Meeting Playbook

1. Refresh the screen
2. Go to the **Home** tab
3. Click your **Meeting Playbook** under **Today's Meetings**

Step 4: Upload and Summarize a Document

1. Click **App Launcher** and search **Files**
2. Click the dropdown beside **Sample Statement IRA - Rachel Adams** and **Download**
3. Return to your meeting playbook
4. Click **Upload Files**
5. Use the sample IRA file provided
6. Click **Done**
7. Choose a Document Type
8. Check **Summarize** and **Include in Meeting Preparation**
9. Click **Summarize**
10. Make any edits to the summary
11. Click **Save & Close**

Note: We have added some sample Document Types. To add your own Document Type, go to the Meeting Playbook Stage Content Document object. The field will be called "Document Type" to edit and add picklist values.

✓**Checkpoint:** Have you created a meeting from an event, opened your Meeting Playbook, and generated an AI summary from an uploaded document? If yes, you've completed Module 4.

Module 5: Customization (20 mins)

Overview

In this module, you'll customize Meeting Concierge to fit your org's setup. You'll update the Meeting Creation Flow to reference the correct playbook API names if you renamed or built your own playbooks, then adjust the Client Summary prompt so it pulls from the right template for your use case.

Step 1: Add an Object to the Client Summary Flow

1. Go to **Setup → Flows (within Process Automation)**
2. Click **Meeting Concierge: Get Annual Review Client Summary**
3. Click **Save As New Flow**
4. **Name the flow**
5. Scroll down until you find **Get Past Meeting Playbooks**
6. Above **Get Past Meeting Playbooks** click the **+** and choose **Get Records**
7. **Fill in the following details:**
    a. **Label:** Get Open Opportunities
    b. **Object**: Opportunity
    c. **Field**: Account Id Equals {!Get_Account.Id}
    d. **Conditions**: AND
    e. **Field**: Stage Does Not Equal Closed Won
    f. **How Many Records to Store:** All records
8. Under your get record click the + and choose **Decision**:
9. Fill in the following details:
    a. **Label**: Has Open Opportunities?
    b. New Outcome - **Outcome Label**: Yes
    c. **Resource:** {!Get_Open_Opportunities} Is Empty False
    d. **Default Outcome:** No
        i. *Note: We are renaming the outcome label here from "Default Outcome" to "No" to help us visually see the logic.*
10. Under the **Yes** path click the + and choose **Loop**
11. Fill in the following details:
    a. **Label:** Iterate Over Open Opportunities
    b. **Collection Variable:** {!Get_Open_Opportunities}
12. Inside the loop under **For Each** click the **+** and choose **Add Prompt Instructions**

13. Fill in the following details:
    a. **Label:** Add Opportunity Details
    b. **Prompt Instructions:**

```
None
Opportunity: [SourceId : {!Iterate_Over_Open_Opportunities.Id}]
- Name: {!Iterate_Over_Open_Opportunities.Name}
- Stage: {!Iterate_Over_Open_Opportunities.StageName}
- Amount: {!Iterate_Over_Open_Opportunities.Amount}
- Close Date:{!Iterate_Over_Open_Opportunities.CloseDate}
```

14. Click **Save**
15. Click **Activate**

Step 2: Update the Client Summary Prompt

1. Go to **Setup → Prompt Builder**
2. Click **Create Annual Review Client Summary**
3. Click **Save As → Save as a New Version**
4. Under **Advisor Priority** click **Enter** and add**:**

```
None
· **Opportunities** – current open opportunities with the client including the name, amount, close date and stage
```

5. Click **Save**
6. Click **Activate**

Step 3: Test Your Flow and Prompt Updates

1. **App Launcher → Agentforce Meeting Concierge App**
2. Click the **Meeting Playbook** we made earlier
3. Click **Refresh** in the top right corner of the widget above the tasks
4. Click **Regenerate**

✓ **Checkpoint:** Have you activated your updated Meeting Creation Flow and confirmed the Client Summary box reflects your new prompt template? If yes, you've completed Module 5.

Wrap-Up & Key Takeaways (5 mins)

Congratulations – you've configured and deployed Meeting Concierge across the full client meeting lifecycle! Here are your 3 key takeaways from today:

1. **Configure and deploy Meeting Concierge** and leave with a working agentic setup for your relationship management workflows
2. **Move from activated to adopted** by gaining the use case clarity and skills to embed AI into financial services workflows
3. **Go beyond out-of-the-box.** Customize Meeting Concierge to fit your firm's unique relationship management workflows across banking, wealth, and insurance

CTAs & Q&A

- **Download this workbook** for reference after the session
- **Get in touch with your AE** to schedule a customized Meeting Concierge demo or Proof of Concept for your organization
- **Share your feedback** – use the QR code at the front of the room to complete the session survey

Q&A

Time for your questions! Facilitators are here – raise your hand or approach the stage.

Want to Learn More?

Continued Learning

Explore Financial Services learning and development opportunities:

- Meeting Concierge Trailhead
- Financial Services Cloud Professional Course

Documentation

- Agentforce Developer Guide
- Financial Services Cloud Release Notes

Related Dreamforce 2026 Sessions

Check the Dreamforce session catalog for additional Agentforce for Financial Services sessions. Ask your facilitator for the latest session list or visit our booth for a printed schedule.

Post-Dreamforce Resources

Want more hands-on time? Reach out to your Salesforce account team to schedule:

- A **Meeting Concierge Discovery Workshop** tailored to your organization
- A **Technical Architecture Review** with our FSC Solution Engineers
- A **Success Plan Discovery Call** for dedicated expert support