



5 Steps to Deploy Your First AI Agent

The proven blueprint to help financial services leaders get up-and-running quickly with Agentforce.

How can I assist you?

Show me the Brown household financial plans and goals

Here you go:

Brown household currently has one comprehensive financial plan with six active goals.

Would you like me to summarize progress or surface any risks?



Layla Brown

Account Value	\$1,250,000
AUM	\$950,000
Last Interaction	November 15

Introduction

For financial services leaders, the question is no longer *if* you will adopt AI agents, but how quickly you can turn them into a competitive advantage in a regulated environment. The real opportunity lies in execution and trust. Confidently deploying your first agent is the key to unlocking limitless potential for your relationship managers, brokers, advisors and customers.

In this guide, we're giving you the proven tips – right from our team of Agentforce Financial Services experts – to help you deploy your first agent fast. We'll share how to:



With [Agentforce Financial Services](#), industry leaders are enabling their customers' financial success and increasing loyalty with trusted AI, grounded in deep, contextual data for banking, wealth management, and insurance.



Industry Insight:

“In financial services, speed matters — but trust and control matter more. That's why defining your vision and guardrails upfront, with a partner who understands both the technology and your regulatory environment, is critical. Your agents need to do more than work well in a demo; they need to scale securely and earn the trust of your team and customers.”

Stephen Bennett,
Senior Customer Success Manager, Financial Services, Salesforce



Tip 1: Outline Your Agentforce Strategy

Before building, align your leadership on a clear vision that balances innovation with the rigorous compliance standards the financial services industry demands.

- 1. Assess your AI readiness:** Bring key decision-makers together to build a 30-60-90 day plan for your Agentforce implementation. Assess your technical readiness – specifically your data accessibility and security – and evaluate if your organization is ready to lean into an agentic workforce.
- 2. Operationalize your team:** One of the biggest factors to AI success is change management. Ensure that your team is set-up to adopt and manage AI agents effectively, that everyone is clearly aligned on the vision, and that each step of the pilot has clear, measurable KPIs to keep everyone accountable.
- 3. Validate with industry experts:** Leverage external expertise to validate your roadmap and technical architecture. With [Salesforce Success Plans and Professional Services](#), our team of experts give you the personalized guidance and hands-on support you need to bring your vision to life. In a highly regulated industry like financial services, they can help you identify readiness gaps, anticipate compliance requirements, and share best practices from similar companies.



“Leveraging today’s technology, especially AI, is crucial in financial services. Signature has been key in helping us with AI readiness. If we don’t embrace it, market forces will hold our industry accountable.”

Cat Davies
CEO, Innovayte
Signature Success Plan customer



Tip 2: Define Your First Use Case

Start small with a high-value, low-risk pilot to prove capability and build internal confidence.

- **Apply the "Jobs to Be Done" framework:** Don't boil the ocean. Use a simple framework to define your agent's purpose: *"When [Moment], I want [Action], so that [Goal]."*
For example: *"When a client calls about a lost card, I want the agent to immediately cancel the card and issue a replacement, so that the client is protected instantly".*
- **Leverage financial services blueprints:** Accelerate time-to-value by starting with proven use cases rather than building from scratch. Agentforce Financial Services has pre-built agent templates for common use cases to make the build even easier. Consider starting with these templates for financial advisor meeting prep, transaction disputes, or insurance policy summaries.
- **Establish guardrails early:** Define your "guardrails" before your "actions." Determine exactly what the agent *cannot* do (e.g., "Do not allow changes to order details without 2-factor auth") so you maintain trust and stay compliant with industry regulations. Establish an operating model that defines roles like "Agent Owner" to ensure clear accountability and human oversight.



See how Salesforce Customer Success can help.

With [Salesforce Success Plans](#), our Agentforce experts can help you identify and draft your first use case. Sign up for an upcoming workshop [here](#).

If you already have the Signature Success Plan, connect with your Customer Success Manager to request an Agentforce Architect Engagement and build your use case with an expert by-your-side.

Tip 3: Unify the Data You Need Today

Your agents are only as smart as the context they have. You don't need all your data to be perfect to get started, you just need to connect the specific data for your use case.

- **Connect disparate data:** Identify the specific data points required for your pilot (e.g., transaction history, policy details) and where it all lives – whether that's in modern apps or legacy core banking systems. Use [Mulesoft](#) to connect, govern, and harmonize data from these sources into [Salesforce Data 360. Zero-Copy](#) capabilities allow agents to query data in place without replication, maintaining security and compliance while delivering on your vision.
- **Provide the full context:** Leverage [Informatica](#) to reconcile and cleanse your data for higher quality, giving your agent the context it needs to reason effectively and provide accurate, trusted responses. Layer on [Agentforce Data Libraries](#) to ground your agents in your company's trusted knowledge base, such as policy PDFs, standard operating procedures (SOPs), or compliance guidelines.
- **Secure every interaction:** Once your data is unified and contextualized, protect it. The [Salesforce Trust Layer](#) ensures that sensitive financial data is masked and never retained by third-party LLMs, allowing you to deploy AI with confidence that you're meeting strict financial data privacy and residency requirements.

See how Salesforce Customer Success can help.

With Success Plans, you get access to 1:1 Expert Coaching Sessions to help you with Data Cloud best practices, data ingestion and harmonization, segmentation, and more.

Register for a session today!



Tip 4: Build, Test, and Deploy with Confidence

Move from planning to production by starting with pre-built templates, customizing with expert help, and testing rigorously.

- **Deploy pre-built agents quickly:** Jumpstart development by leveraging pre-built agents that are already available in Agentforce Financial Services. For example, Relationship Agent automates manual post-meeting tasks and follow-up, allowing Relationship Managers to focus on high-value advisory work.
- **Customize to fit your needs:** To take your agentic vision to the next level, Salesforce's Customer Success team is here to help you customize, connect, or refine your agent(s). With this proactive, personalized partnership, you can be sure your Agentforce strategy is mapping to your organization's unique needs, and that you have the expertise needed to innovate and scale long-term.
- **Ensure precision and reliability:** You don't need to be an engineer to control your agent. Use [Agentforce Script](#) to blend the creative problem-solving of LLMs with the certainty of a deterministic system needed for various precision-driven financial actions – all using natural language. You should also define clear escalation paths, ensuring complex or sensitive financial situations can be handed-off to a human expert easily and with full context.
- **Test rigorously:** Utilize the [Agentforce Testing Center](#) to run batch tests against hundreds of scenarios – including adversarial attacks – to ensure your agent performs as anticipated. Validate that the agent accurately follows instructions and stays within defined guardrails before a single customer interacts with it.

See the growing number of use cases and pre-built agent skills for Agentforce Financial Services.

[Learn more here](#)



Tip 5: Establish a Center of Excellence (CoE) to Scale

Deploying your agent is just the beginning. Transform your initial success into a scalable, enterprise-wide journey with the right resources.

- **Formalize a CoE structure:** As you move beyond the pilot, establish a dedicated Center of Excellence (CoE) that brings together leaders from every area of your business. This body will oversee the agent roadmap, ensure governance and risk controls are adhered to, and standardize best practices across your organization.
- **Optimize with continuous feedback:** Implement a "monitor and improve" loop. Use agent monitoring platforms, like [Agentforce Observability](#), to track KPIs and ensure your agents are performing according to plan. Use these insights to continuously refine agent instructions and expand capabilities into additional use cases.
- **Manage your agents like employees:** In the same way you onboard and provide feedback to human employees, it's critical to create "AI Manager" roles to do the same for your AI agents. This holistic approach ensures you aren't just deploying technology, but building a sustainable agentic workforce.

"With Agentforce, our customers can sleep easy, knowing that if something goes wrong with a transaction, we'll handle it quickly and precisely. Agentforce empowers our service team to resolve pressing customer issues 88% faster."

Lindelani Ramukumba,
Relationship Banking CIO, Absa Group



Want to dive deeper?

[Watch this on-demand webinar](#) to learn the proven tips to build a scalable Center of Excellence, directly from our team of Agentforce Forward-Deployed Engineers.

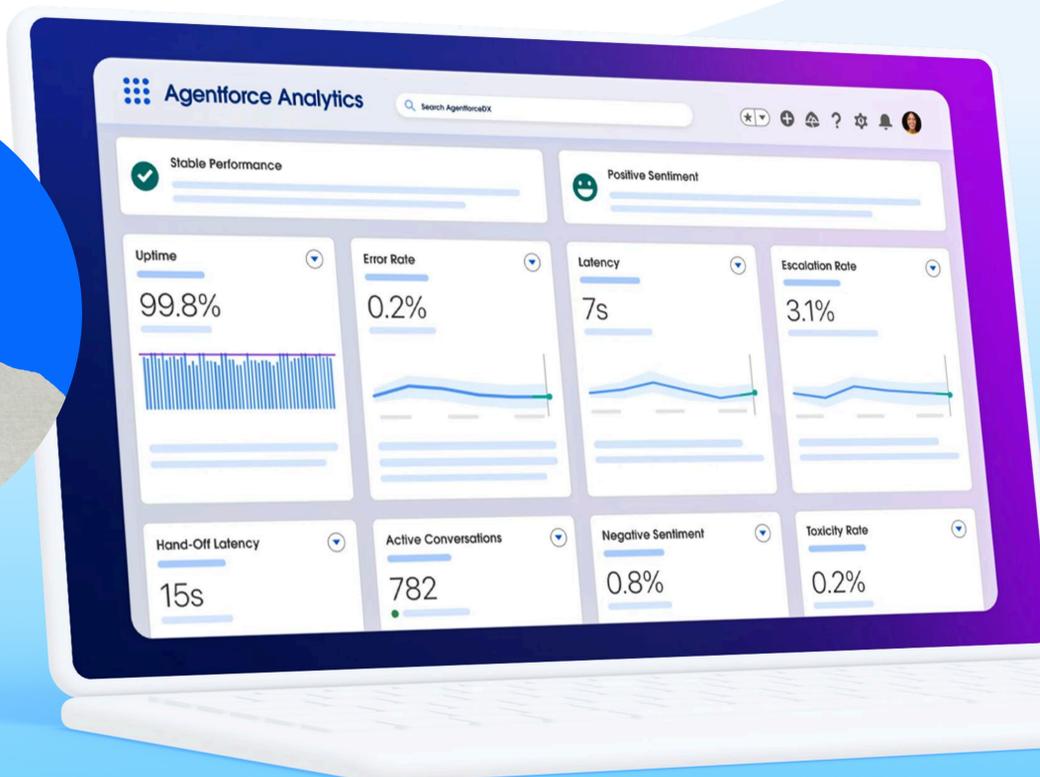
Achieve your AI goals and deploy agents quickly with Salesforce Customer Success and Agentforce Financial Services.

Whether you're just starting to think about AI, want to deploy an agent quickly with our pre-built financial services templates, or are ready for a customized, multi-agent strategy, Salesforce Customer Success is here to help you get started fast—without sacrificing trust. That way, you can focus on building relationships and empowering your customers' financial success.

[Learn More Here](#)



Activate Agent





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