

ISV + Agentforce

Marketing Campaign Playbook
for ISV Partners





We've made this for you to be successful

We've come a long way together, and we're excited to see the incredible agent you've built with Agentforce! Now, it's time to take the next step and bring your solution to the world. This playbook is designed to empower you to market and sell your agent effectively, leveraging the powerful features and capabilities of Agentforce.

In this playbook

We created a step-by-step guide to help build joint messaging, create content, and develop integrated campaigns at lightning speed. The goal of these campaigns is to drive and accelerate your pipeline and revenue. Ensuring your success is our top priority.

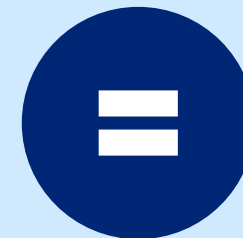
Delivering a high-impact joint campaign



Your solution +
Agentforce
messaging



Integrated
campaign
strategy



Strategic joint
value campaign

We provide Agentforce messaging and brand resources to combine with your solution's messaging.

You apply your joint message to the suggested content and integrated campaign strategy provided in this deck.

You launch a high-impact campaign that combines the power of Agentforce and your ISV solution.

NEW: Agentforce + ISV messaging prompt

This AI prompt will help you generate joint messaging that combines the value of your partner solution and the power of Agentforce.

Get started [here](#).

Joint campaign objective

Showcase how quickly and easily your prospects can drive business results with your solution and Agentforce.

The goal is to drive revenue and pipeline through these tactics. We recommend focusing on two or three KPIs for each step of the journey.

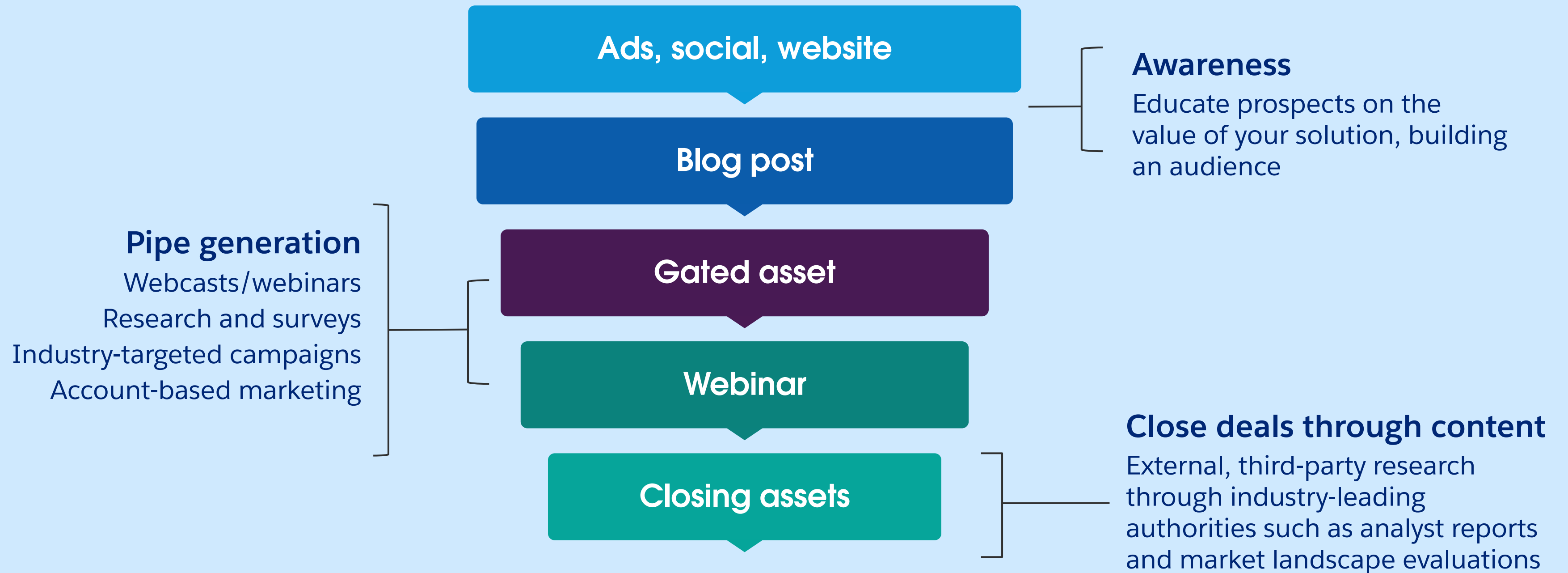
- Revenue
- Pipeline
- Leads generated
- Website visits
- Prospects generated
- Landing page traffic
- Social media engagement
- Email open rate
- Email replies
- Free trial sign-ups
- Demo requests
- Meeting requests



Marketing funnel



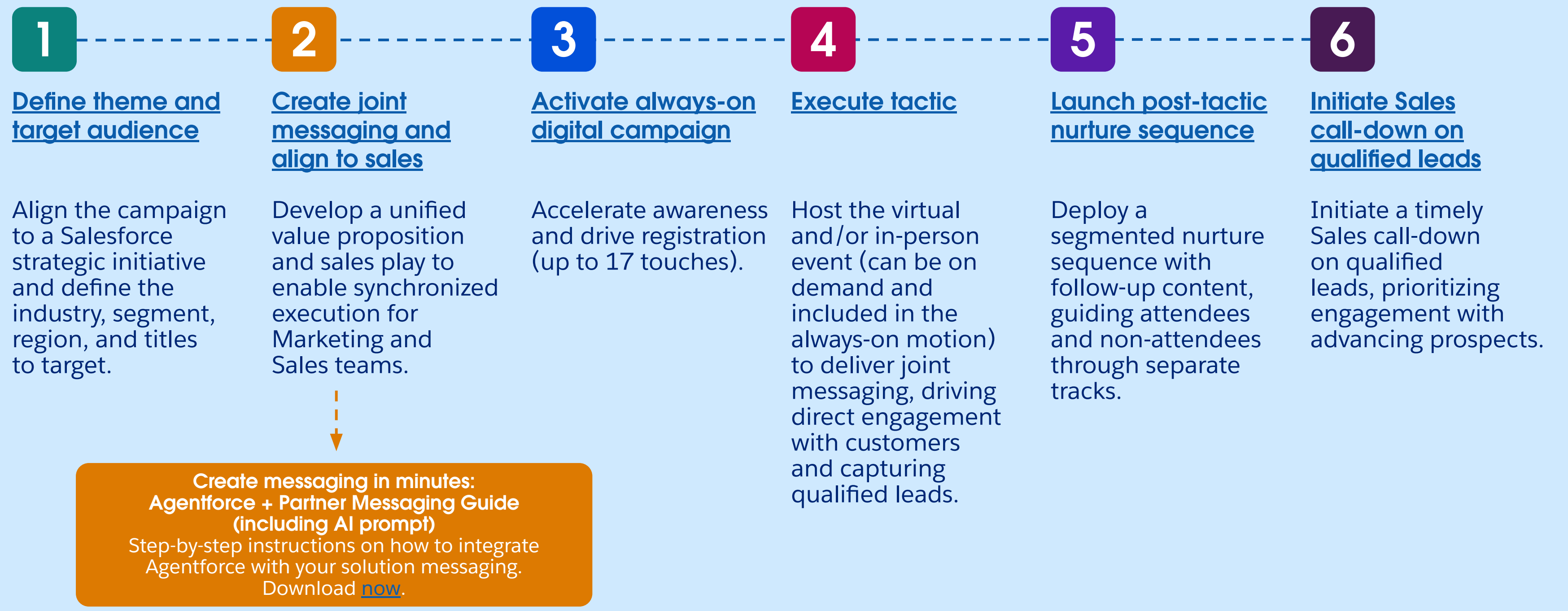
Generate and influence revenue with a comprehensive marketing strategy. Combine these elements together to create an integrated campaign.



Agentforce campaign journey

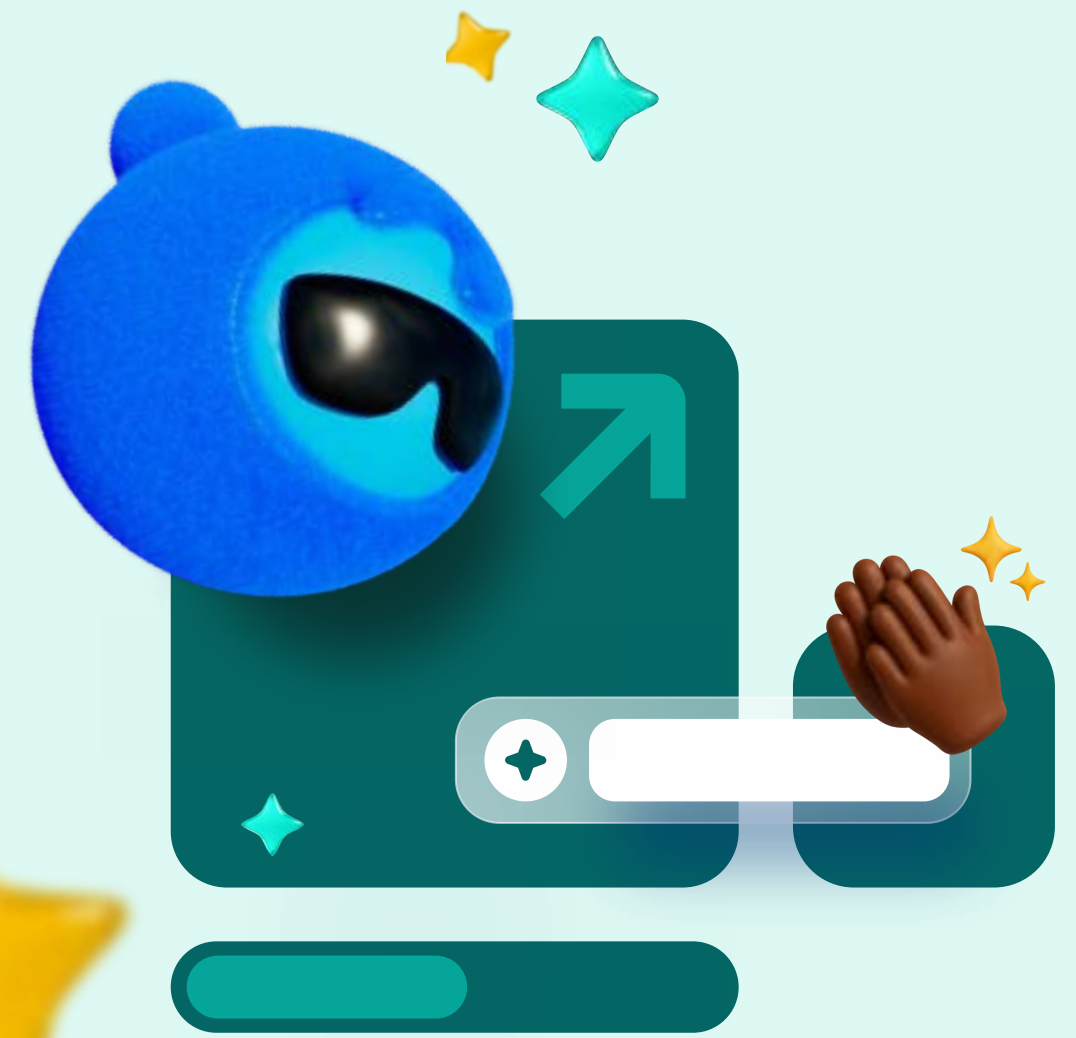


Once you develop your Agentforce campaign assets, they should form an integrated journey.



Define theme and target audience

Stage 1



Precision-driven pipeline



The theme content included is for **Agentforce**, but the campaign journey works across any theme.

Your target audience is the same as your core product.

Agentforce features should enhance the solution you have for your predefined target audience. No need to change it.

If you don't have your target clearly defined, here are some useful tips:

- **Know your audience:** Understanding who you are reaching out to is vital to your marketing campaign, enhancing targeted efforts and generating qualified leads. Perform market research to determine where your solution will solve a specific problem for your customers.
- **Develop detailed buyer personas:** Outline key persona traits, pain points, and decision-making factors. Include behavior, motivations, and ideal outcome in addition to demographics. List communication preferences to ensure content specifically resonates.
- **Segment for relevance:** Implement segmentation strategies, potentially using firmographic data and buyer intent signals, to tailor personalized outreach effectively. Find a data analytics or quantitative analysis expert to help you.

Agentforce target audience

When developing your joint campaign, identify your solution's target audience and make sure to find an intersection between your buyer and the Agentforce buyer's persona.

Agentforce buyer goals

- Provide faster, more personalized, and data-driven customer experiences
- Leverage AI without disrupting workflows or relying on IT resources
- Scale operations quickly and cost-effectively
- Ensure seamless integration with existing tools
- Leverage low-code guardrails and security tools designed to keep data secure, prevent abuse, and reduce hallucinated and biased responses



Agentforce buyer personas

- CTO, CIO, VP of Sales, Head of Customer Service, Director of Operations
- Industries: Tech, finance, retail, healthcare, or any customer-focused enterprise

Agentforce buyers want to:

- Safely deploy agents that work for their customers, suppliers, and employees 24/7
- Add agentic automation across their entire business to streamline workflows and focus on strategic work



Target audience resources

The Ideal Customer Profile (ICP):

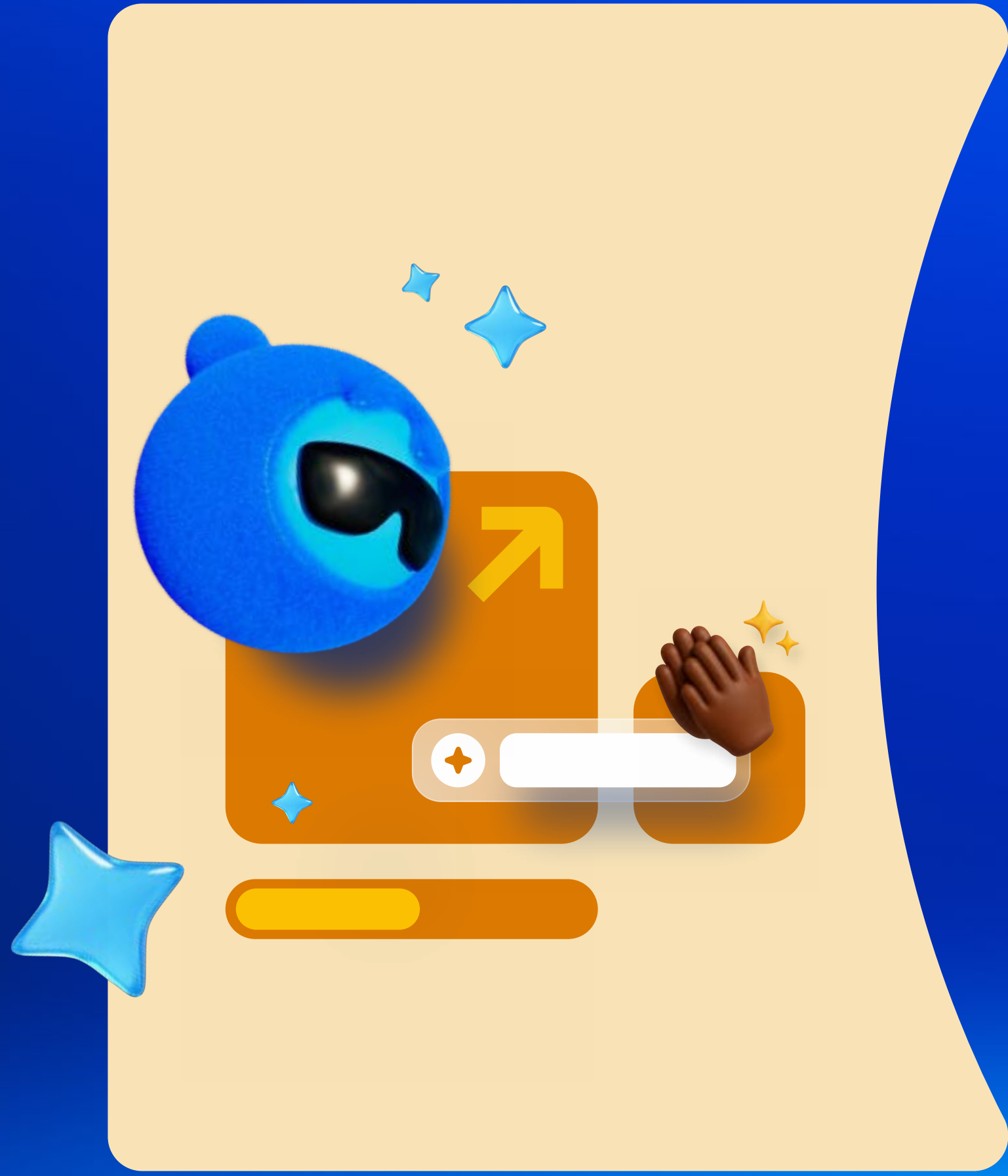
If you have not built out an ICP, watch this [video](#).

If you already have your ICP defined, move on to the next stage!



Create joint messaging and align to sales

Stage 2



Bringing joint value to customers



Why is this critical?

The goal is to drive more revenue with a compelling joint value proposition that differentiates from the competition. Focus on why now and tie messaging directly to the currency of your campaign theme. This unified message is the foundation of synchronized Sales and Marketing execution.

Four N sales play framework

Need (Who needs your solution? Ideal customer profile), **Name** (What's the title of the person you're trying to engage?), **Number** (What business goals are you trying to improve? Faster sales, etc.), and **Now** (Why should the customer act now versus tomorrow?)

How to execute

1. Messaging: Follow this messaging format:
[Customer Pain Point] + [ISV Solution] + [Agentforce] = [Unique Business Outcome and ROI]
2. Sales playbook alignment: Develop a mutual sales play document that covers:
 - Discovery questions: Three to five specific questions that open the conversation around the theme
 - Objection handling: Scripted responses for common resistance points related to integration, cost, or redundancy
 - Handoff criteria: Clear, agreed-upon rules and collaboration for when a lead moves from each stage
3. Content: Create core content assets (key white paper, solution brief) that can be easily broken down into smaller pieces for use across all digital channels (email, social, blog).

Agentforce key messaging



This campaign messaging should underpin all joint campaign assets. The ultimate goal is to instantly communicate Agentforce's value while also generating excitement for your solution.



Use this [Agentforce + Partner Messaging Guide](#) to create your joint campaign message. This guide contains an AI prompt that will combine your key message with Agentforce. Don't start from scratch. Use this prompt to get your first draft created as quickly as an LLM output.

Trusted

The Trust Layer ensures responsible AI. Protecting customer data with robust security (zero data retention, toxicity detection), it guarantees safe and accurate AI outputs across the Salesforce ecosystem.

Relevant, deterministic results

The Atlas Reasoning Engine is how Agentforce understands, decides, and acts autonomously to provide trusted, accurate and predictable answers for every request.

Easy to deploy

You can deploy out-of-the-box agents for any role or industry. Agents have the capability to take action with existing workflows, code, and APIs without training AI models. All right in the flow of work.

Open, Unified

Agentforce is deeply integrated with your data, apps, and the humans using them. The open platform means can you use the data and LLMs of your choice.



Messaging resources

Partner + Agentforce messaging

Use this [guide and template](#) to develop joint campaign messaging.

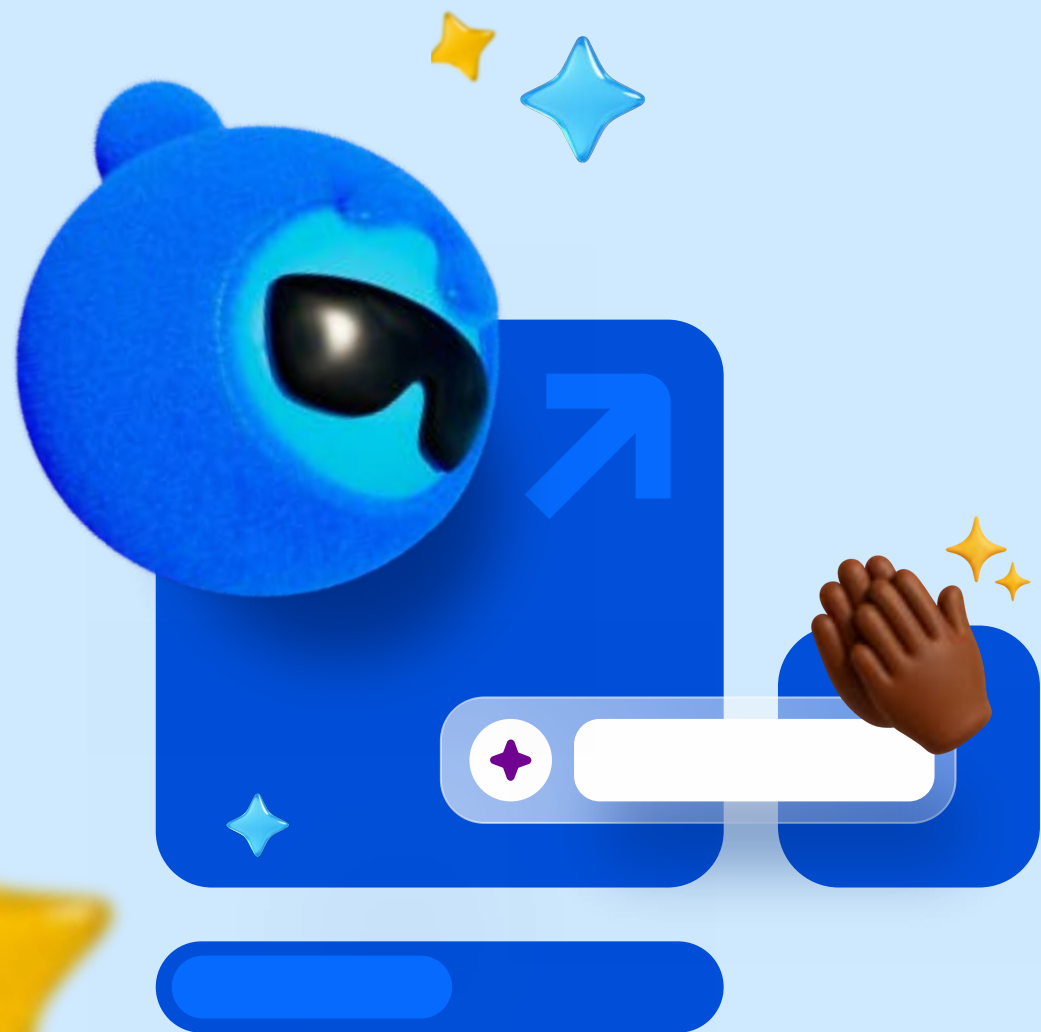
See an example of joint partner + Salesforce messaging in action:

[Webinar for ISV Partners:
Pitching Agentforce to Your Customers](#)



Activate always-on digital campaign

Stage 3



Activation pre-tactic momentum



Why is this critical?

Pre-tactic momentum validates your messaging and ensures the tactic itself is the peak of engagement, not the starting point. It serves as your T-Minus Launch sequence. It isn't just about driving tactic registration; it's about establishing digital intent signals and warming up the target list.

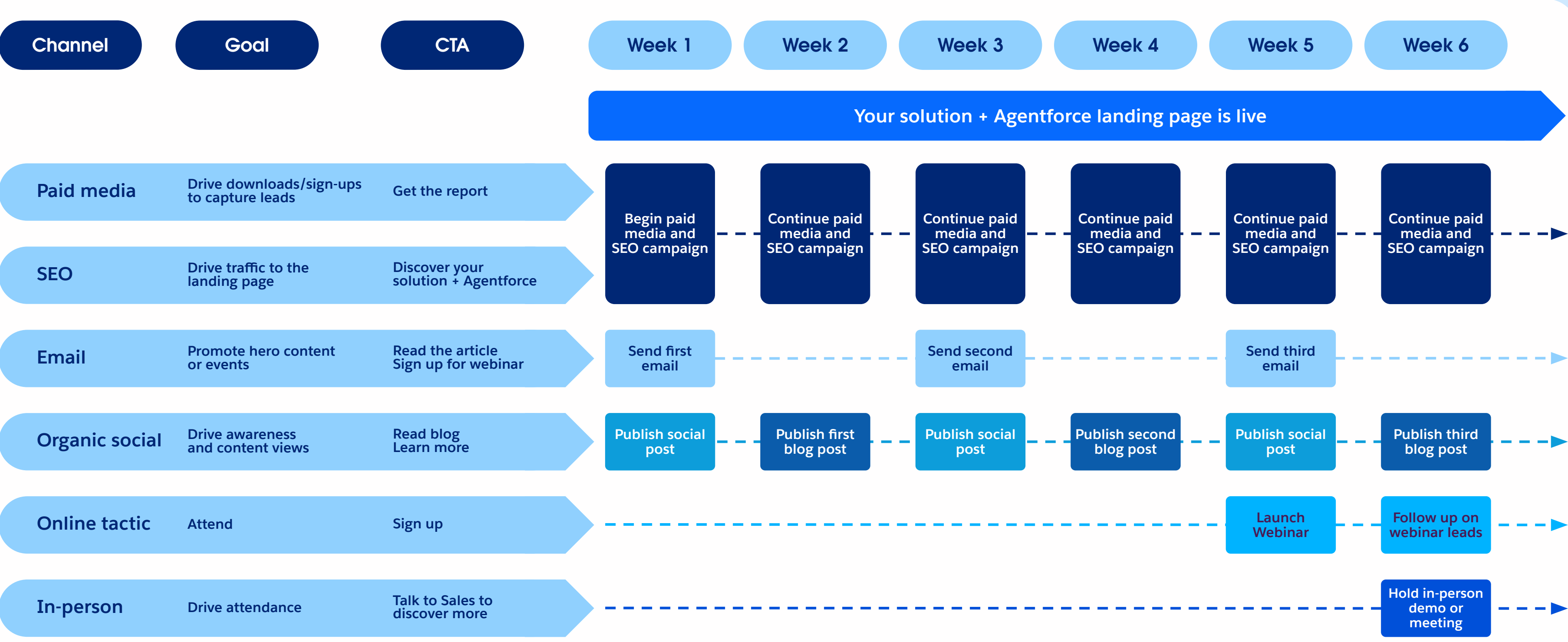
How to execute

1. Options: Use your ideal customer profile (ICP) and targeted account list (TAL).
2. Share your social toolkit with your Salesforce team.
3. Targeted email invitation cadence:
 - Email 1 (Problem): Focuses solely on the pain point identified in Step 1
 - Email 2 (Agitation): Details the cost and risk of not solving the problem
 - Email 3 (Solution/Invite): Presents the event as the solution and the pathway to the unique business outcome
4. Landing page clarity: The registration page must use the unified messaging and immediately convey the ROI/value the attendee will gain. Use strong social proof, if available.
5. AppExchange/AgentExchange: [Update your listing.](#)



Always-on campaign sequence example

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





Campaign resources

Content Strategy with Go-to-Market Essentials

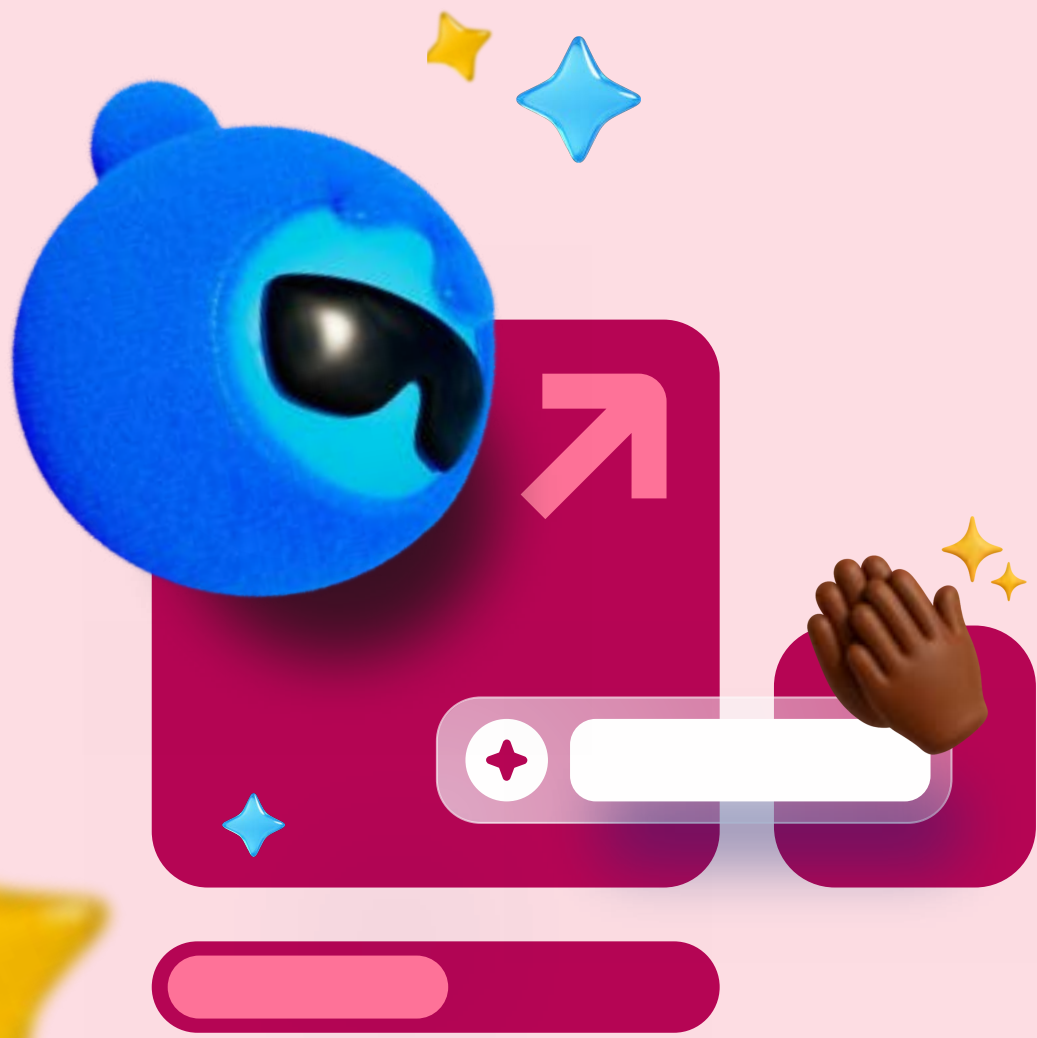
This session ([video](#)) guides ISVs on how to develop a content and marketing strategy that aligns seamlessly with their target customer journey. ISVs will leave this course with an understanding of the essential content assets needed to support their marketing.

Adopt, Optimize and Grow

This session ([video](#)) focuses on the importance of continuous testing, refining, and optimizing marketing efforts to drive long-term growth. ISVs will learn how to assess marketing effectiveness, track key performance metrics, make data-driven improvements, analyze traffic, create impactful content, run A/B tests, and optimize strategies across multiple channels.

Social media posts

- Download these [free social templates](#)
- Feature your [Salesforce partner badge](#) in social graphics



Execute tactic

Stage 4

Driving peak engagement



Why is this critical?

The tactic (virtual or in-person) is where you transform passive interest into active, first-party intent. It provides the necessary bandwidth for a detailed narrative delivery and allows for direct engagement and qualification.

How to execute

1. Outcome-driven delivery: Shift the focus from company introductions to engaging, integrated demonstrations that solve the core pain point in a real-world scenario. Use customer voices and testimonials whenever possible.
2. Intent-based Q&A: Pre-segment attendees based on their registered titles or early chat interactions. Use dedicated breakout rooms or segmented Q&A to deliver hyper-relevant content, capturing deeper intent data.
3. High-hygiene lead capture: Ensure instant, two-way sync between your lead capture platform and your CRM/MAP. Registration and engagement data must be mapped to specific, agreed-upon fields for immediate scoring.

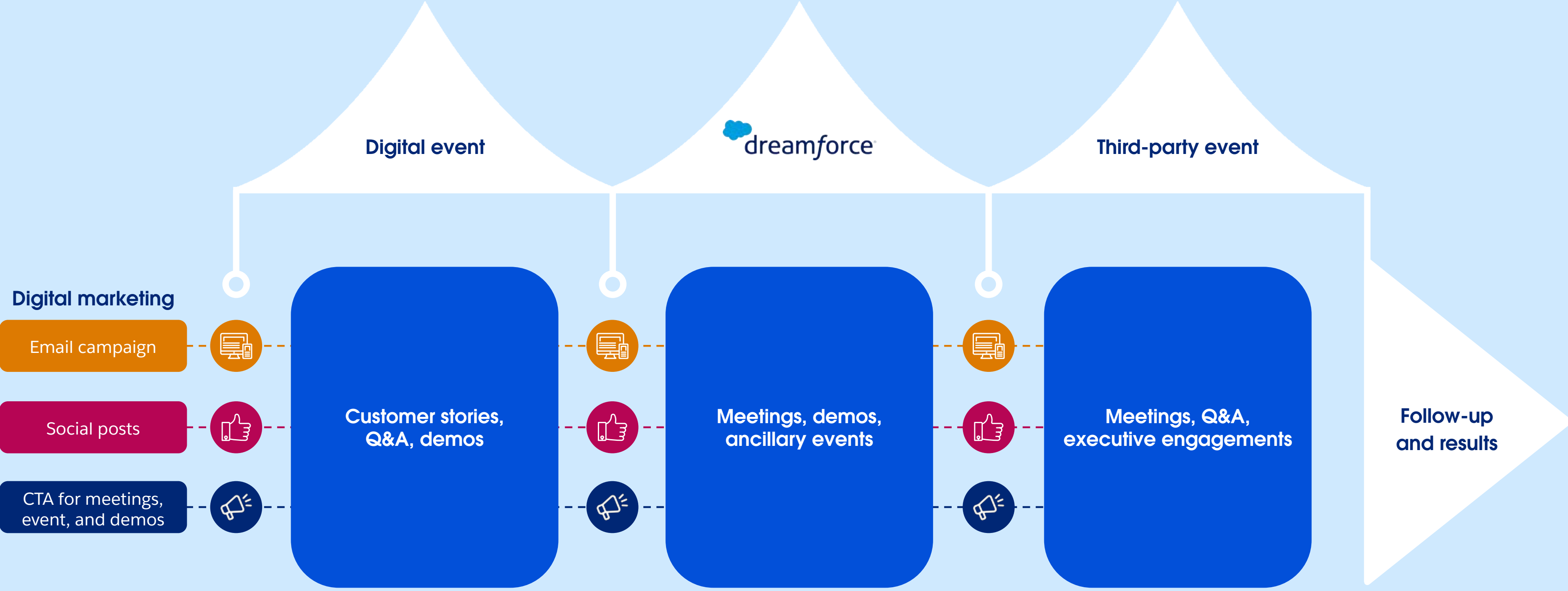
Best practice and tip

Capture one specific, high-intent data point beyond attendance: Which key takeaway or product feature resonated most with the prospect? This qualitative data is invaluable for next steps and sales engagement.



Tent pole experience

Key moments your entire campaign is anchored around to lead up to and follow up from.





Event resources



[Event Planning Guide for Salesforce ISV Partners](#)

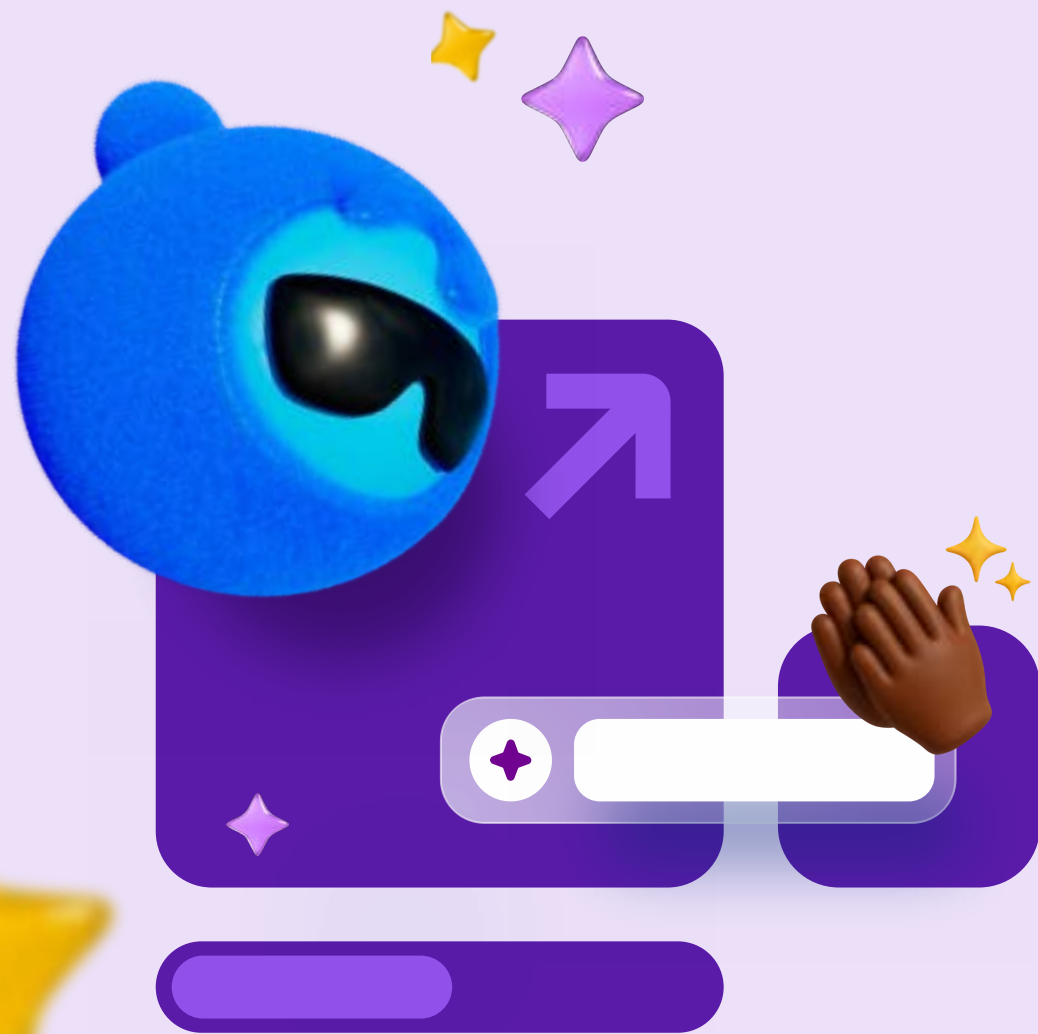
Use this [guide](#) as your go-to resource for planning large ancillary gatherings, small customer roundtables, and everything in between.

Sponsoring a Salesforce Event?

Use this guide to [Make the Most of Dreamforce for ISV Partners](#). This guide was made for Dreamforce specifically but many of the ideas can be used for sponsoring other events as well.

Launch post-tactic nurture sequence

Stage 5



From lead to marketing qualified lead



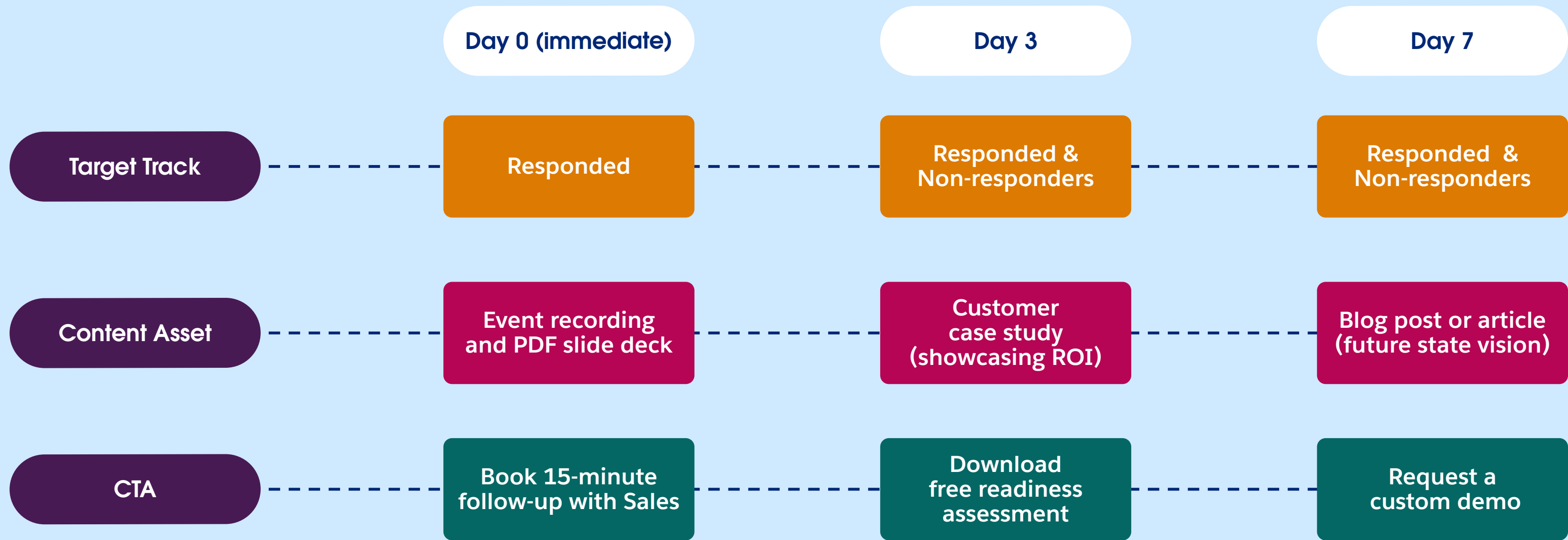
Why is this critical?

The nurturing sequence is designed to capture the fading glow of event intent. Marketing qualified lead (MQL) velocity drops off sharply after 48 hours. By segmenting your follow-up, you deliver the right content, respecting the customer's previous interaction and guiding them efficiently to the next stage.

How to execute

1. Immediate segmentation: Deploy two distinct, high-impact nurture tracks:
 - a. Track A (Attendee or downloaded): High-intent track. Send a follow-up email within four hours of event close containing the recording, specific next steps (e.g., a short assessment tool), and a soft call to action (CTA) for a Sales meeting.
 - b. Track B (Non-attendee/didn't open email): Reengagement track. Lighter touch. Offer the event's core strategic insight (e.g., a top three takeaways PDF) and re-sell the primary value, avoiding an immediate demo request.
2. Content mapping: Each touchpoint must map to the unified value proposition and include a specific, measurable CTA.
3. CRM score adjustment: Event attendance and subsequent content downloads must trigger an immediate uplift in the prospect's behavioral score to surface them quickly for Sales.

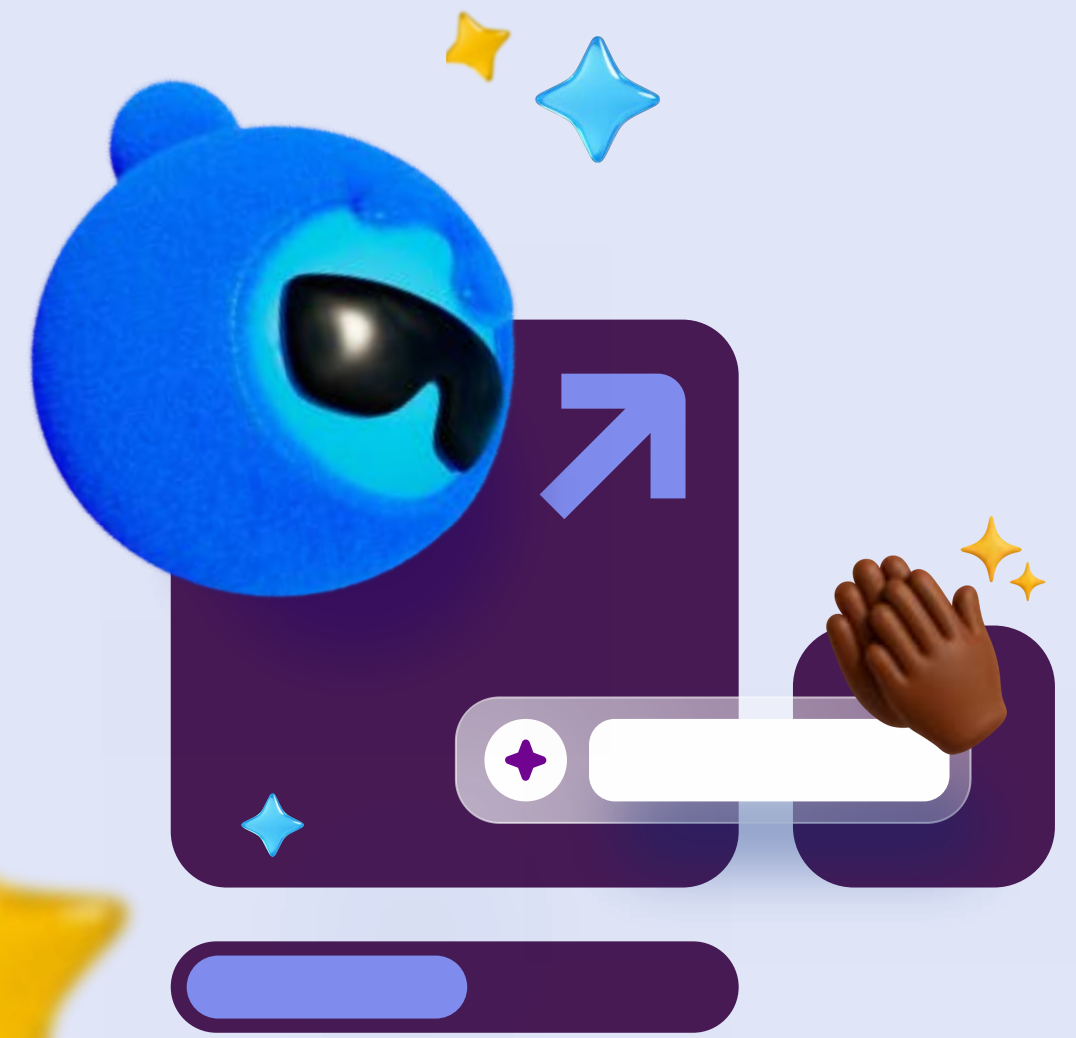
Nurture best practices



Critical success factor: If an attendee requests a follow-up with Sales for a demo or discussion, act on it immediately (ideally within four hours to set the meeting).

Initiate Sales call-down on qualified leads

Stage 6



Pipeline acceleration



Why is this critical?

Sales should be deployed immediately to capitalize on the nurtured intent. A joint, synchronized call-down, based on preestablished lead scoring, ensures that only high-probability accounts are prioritized, speeding up the time from marketing qualified lead (MQL) to Stage 1 pipeline.

How to execute

- Agree on what defines MQL first: Nothing breaks a Marketing-Sales relationship faster than volume over quality. Before launch, reference Stage 2, and align with Sales leadership on the criteria (e.g., the [Four N sales play framework](#)) that make a lead truly Sales-ready. Focus on quality leads that accelerate the pipeline, not just fill the top.
- Recognize that context is king: Don't just pass a name; pass the story. For every qualified lead, provide the full context: What was their pain point? What campaign asset did they engage with? Why is our joint solution a fit for them right now? This gives the sales development representative/account executive the empathy and knowledge to start a relevant conversation immediately. Include all marketing campaign information. Share with Sales which pieces of content the prospect has consumed and when. Also share event information.
- Set up a service level agreement (SLA) that fuels success: High-priority leads require quick action. Follow up within four hours to keep the momentum going and ensure you don't miss out.
- Close the feedback loop: This builds the relationship foundation. Commit to a short weekly or biweekly meeting where Sales provides feedback on the quality of leads. Did the contacts have budget? Were they the true decision maker? Use their input to fine-tune your campaign messaging in real time.

High-impact sales play tips



A sales play is a cheat sheet that guides sales reps to a quick win.

- Reference the joint value proposition built in Stage 2. Focus on why now and tie messaging directly to the currency of your campaign theme.
- Keep it simple and digestible. Sales reps don't have time for a 15-page manual. The best sales plays are one to two pages that they can easily reference while speaking with a prospect – think cue card – and written in a casual, conversational voice and tone. Key sections should include:
 - Target: Who are you calling (exact persona from your campaign guide)?
 - Pain point: What issue do they have?
 - Joint value proposition: What is the 30-second summary of the Salesforce + ISV partner solution?
 - Key qualifying questions: What top three questions would they ask to determine deal readiness?
- Provide ready-to-use assets. Don't make sales reps draft emails or talk tracks from scratch.
 - Email templates: Provide three prewritten, personalized outreach emails (initial contact, follow-up, breakup).
 - Voicemail/call scripts: Create short, compelling talk tracks that reference the campaign theme and the specific content the lead downloaded.
 - Key success story: Link to the most relevant one-page case study that validates the accomplishment for the customer's industry.
- Use the messaging AI prompt to help draft sales outreach emails.



Business development rep email template



First contact

SUBJECT:

Re: [Web Event Name] - Quick thought on [Specific Pain Point]

BODY:

Hi [Prospect Name],

Thanks for joining our recent event, “[Web Event Name]” with Salesforce. I noticed you stayed for the Q&A section, which makes me think you’re actively exploring solutions for [Customer's Specific Pain Point, e.g., low pipeline visibility or slow quote generation].

Our team at [Partner Sales Rep Company] helps companies like yours move past this challenge using the [Partner Solution Name] solution, built natively on the Salesforce Platform. We help our joint customers achieve [Specific Accomplishment/Result, e.g., 25% faster sales cycles].

Would you be open to a quick **15-minute** chat this week to see how that [Specific Accomplishment/Result] may apply to your goals for [Current Fiscal Quarter/Year]?

Best regards,



Business development rep email template



Follow-up (value-driven nudge)

SUBJECT:

Re: Still struggling with [Specific Pain Point]

BODY:

Hi [Prospect Name],

I know your to-do list is a mile long, but I wanted to circle back briefly on [Specific Pain Point].

Most leaders I speak with at companies like yours find the hardest part is [Slightly Different Angle on Pain Point, e.g., getting executive buy-in or integrating siloed data].

To make your life easier, I thought this might be helpful: Here is a quick, **two-minute video** that shows how a similar company in the [Prospect's Industry] sector used [Partner Solution Name] to [Specific Accomplishment/Result] and achieve a return in [Time Frame].

If this accomplishment is a priority for you right now, I'm happy to schedule a quick **10-minute** call to outline the path forward.

Best regards,



Business development rep email template



Breakup (empathetic and professional)

SUBJECT:

Closing the loop on your interest in [Specific Pain Point]

BODY:

Hi [Prospect Name],

It looks like my previous emails about solving [Specific Pain Point] with Salesforce and [Partner Sales Rep Company] aren't a priority right now, and I completely understand that timing is everything – especially with everything on your plate.

I'll assume for now that you've either solved the problem or the timing isn't right this fiscal year.

Before I close your file, I just want to summarize what you'd be missing out on: the opportunity to use [Partner Solution Name] to gain [Specific Accomplishment/Result] and start impacting your pipeline immediately.

If that potential [Specific Accomplishment/Result] becomes urgent, please don't hesitate to reach out. Otherwise, I wish you the best in tackling your to-do list.

All the best,



Enablement resources



Partner Go-to-Market Offerings Overview on the Partner Community

Access a comprehensive suite of free and paid marketing resources designed to accelerate partner growth.

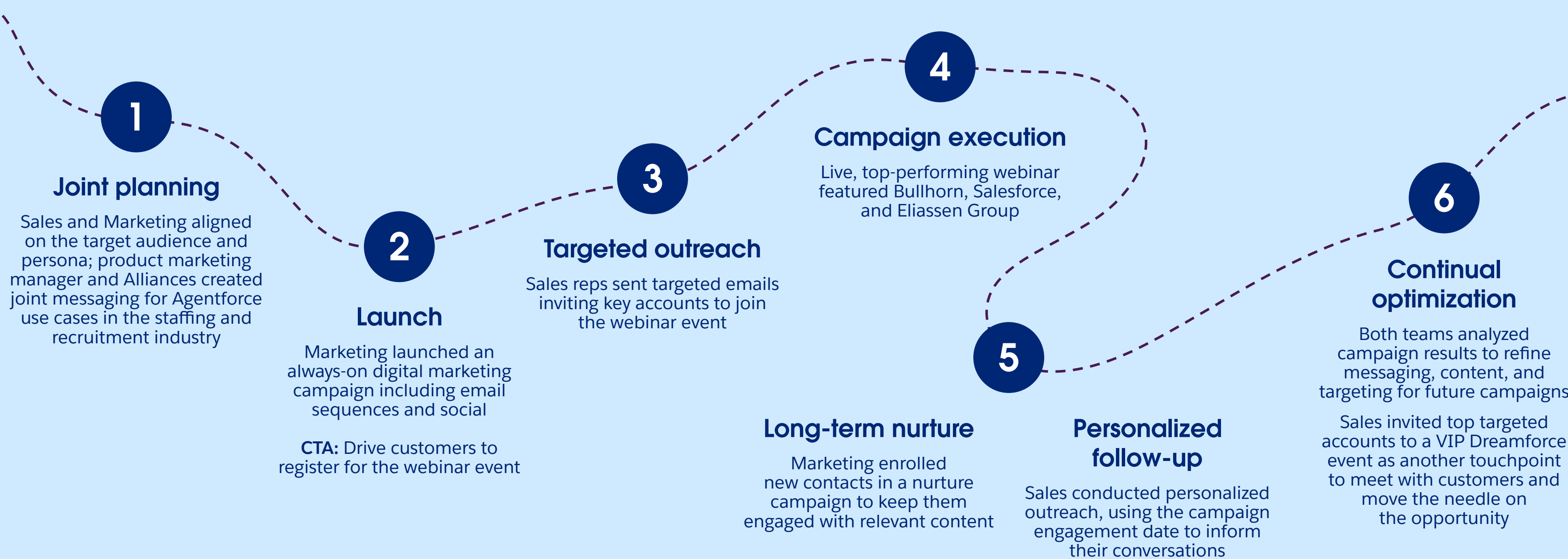
Integrated campaign examples



Bullhorn integrated industry campaign



Strategy and planning



Marketing tactics that win

Stage 4: Campaign execution



Industry webinar

Hosted a live webinar featuring Eliassen Group, Salesforce, and Bullhorn

Tip: Integrate customer storytelling throughout your campaign. Eliassen Group's CIO was a big champion for the Salesforce + Bullhorn partnership.



VIP event

Brought together 13 CIOs and chief revenue officers from leading staffing and recruitment firms

Tip: Marketing and Sales alignment is key to driving targeted accounts and C-suite to an event. No alignment, no one shows up.



Future Fit report

Launched industry report on building the next-generation recruitment business

Tip: Creating new content in Q4 serves as a launchpad for next year's demand generation strategy.



Tech at the Tower

Held half-day summit including a keynote, panel, report launch, and networking

Tip: Leverage flagship events to launch new content. Host a panel discussion on insights from the report, and link the report in sales follow-up.

DocuSign for Agentforce campaign

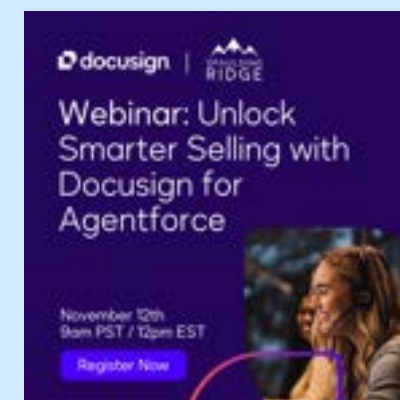


Goal: Drive pipeline by showcasing our new DocuSign for Agentforce integration – and Salesforce interoperability – through a multi-touch, persona-led campaign.

Touch point 1
Content offer

Touch point 2
Webinar

Touch point 3
Programmatic outbound



Details

Thought leadership e-book: “A Seller’s Day, Reimagined”

Validation webinar based on content offer

Coordinated MDR outreach across full TAL

Channels

Email, content syndication

Sales invites, email, content syndication

Sales outreach: Email, phone, LinkedIn

Impact

Warmed target accounts

Strengthened mid-funnel momentum

Drove opportunity creation



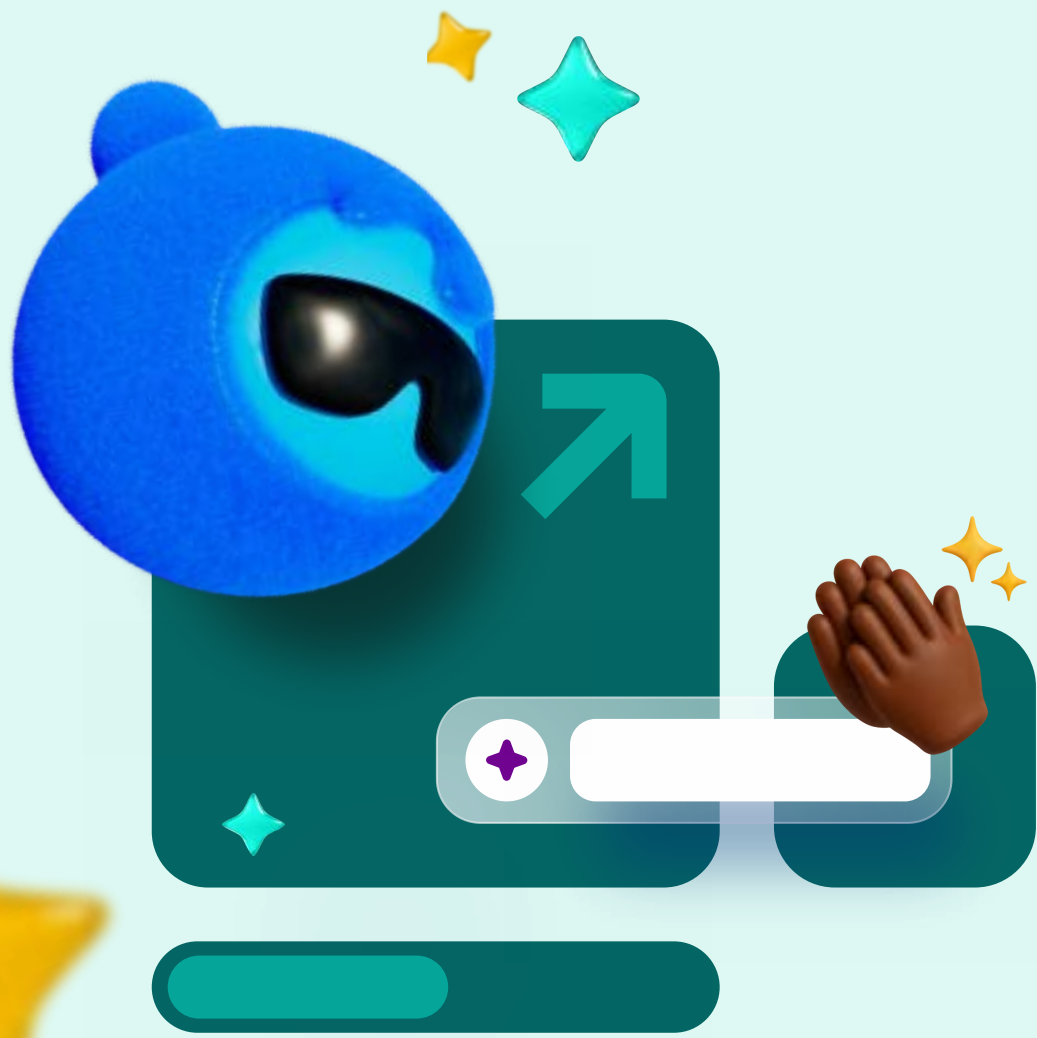
Outcome: A scalable, repeatable GTM campaign

Five9 integrated campaign



Salesforce and Five9 demand generation at World Tours in New York, London, and Boston.





Additional resources

Agentforce

Helpful Agentforce information



Better understand Agentforce messaging while building out your campaign.

Web pages

- [Agentforce overview](#)
- [AgentExchange](#)
- [Agentforce product demo](#)

Videos

- [Agentforce Keynote from Dreamforce 2025](#)
- [What is Agentforce?](#)

Press releases

- [Agentforce 360](#)
- [Salesforce Launches MuleSoft Agent Fabric to Orchestrate and Govern Any AI Agent Across the Agentic Enterprise](#)

Blogs

- [How the Atlas Reasoning Engine Powers Agentforce](#)
- [5 Myths About AI Agents](#)
- [AI Agents For Business and Application Development](#)
- [Why Purpose-Built Agents are the Future of AI at Work](#)

Customer stories

- [Wiley sees 213% return on investment with Salesforce](#)
- [OpenTable dishes out faster restaurant and diner help with Agentforce](#)
- [Saks elevates luxury shopping with unified data and AI Service Agents](#)

Branding

- [Salesforce partner branding guidelines](#)

Campaign resources



Leverage these resources for your promotional assets to support your campaign.

Agentforce + partner messaging

- Use [guide and template](#) to develop joint campaign messaging

Social media posts

- Feature your [Salesforce partner badge](#) on social creative
- Leverage [these free social templates](#)

Web pages

- [How Agentforce Works](#)
- Valoir Report: [Accelerating Time to Agentic AI Value](#)

Linking opportunities

- Link to our [Agentforce page](#)

Customer story template

- For customer story development support (for a fee), review our [co-marketing program promotions](#)
- [Submit your story](#) for free promotion on customer-facing channels

Webinar

- Refer to [Agentforce industry use cases](#)
- Highlight key insights from the [Salesforce Stat Library](#)

First-call script: Sales plays

- Refer to the [Why Agentforce page](#) when drafting your call script to personalize it for each prospect's business needs



Thank
you

Four yellow, four-pointed starburst graphics are scattered around the text. One is positioned to the left of the word "Thank", one is below the "T", one is to the right of the word "Thank", and one is below the "y".