



salesforce



SI Partners

Agentforce

Partner Guidebook

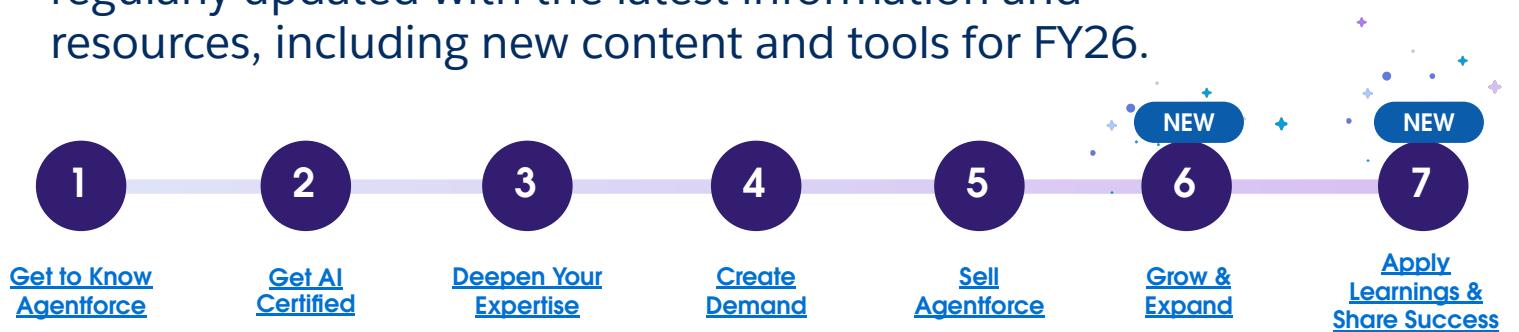
Your step-by-step guide to success with Agentforce



Now
Featuring
New FY26
Content

Agentforce Partner Journey

Welcome to the Agentforce Partner Guidebook, your comprehensive step-by-step resource for launching with Agentforce. Tailored for SI partners, this guidebook is regularly updated with the latest information and resources, including new content and tools for FY26.

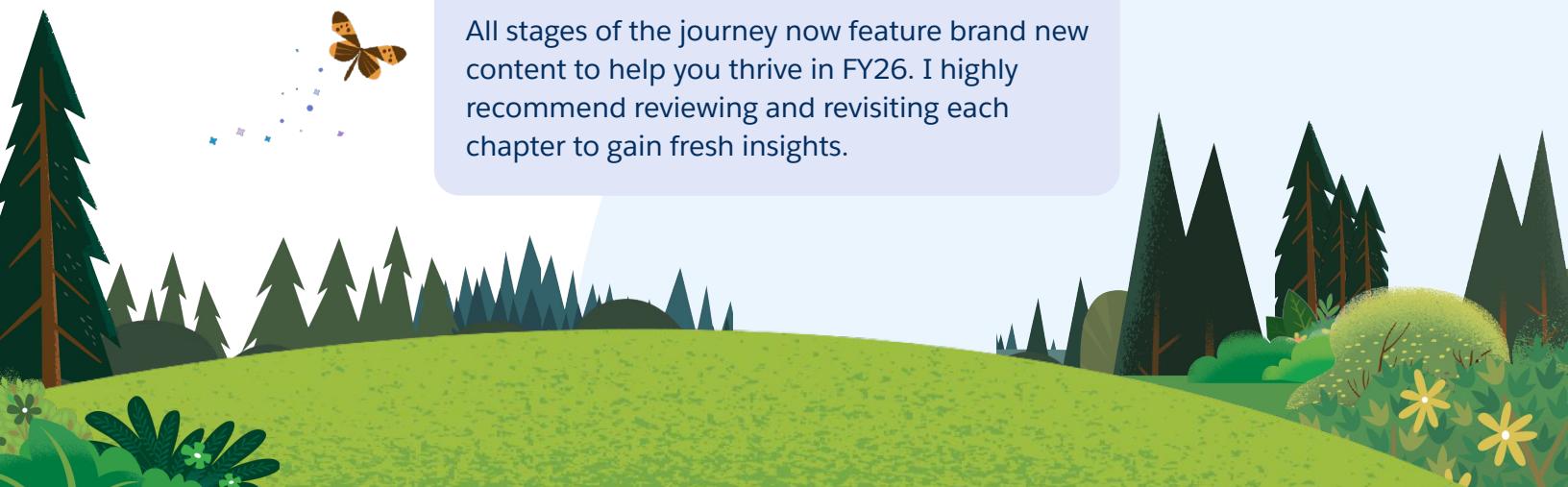


Meet Agent Astro

I'll be your guide, walking you through each stage of the Agentforce journey in this guide.

I'll offer helpful tips, role-focused insights, and more.

All stages of the journey now feature brand new content to help you thrive in FY26. I highly recommend reviewing and revisiting each chapter to gain fresh insights.

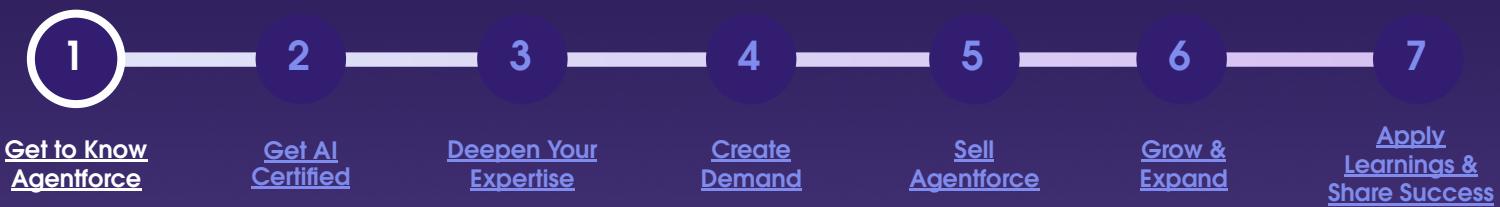




1. Get to Know Agentforce

Overviews, Demos, Use Cases & The Unmatched Agentforce Advantage

The first step in your Agentforce journey is to understand the product. This chapter introduces Agentforce, showcases its capabilities, explores various use cases, and highlights its unparalleled advantages in the agentic space.



1. Get to Know Agentforce

What is Agentforce?

Agentforce is Salesforce's groundbreaking new low-code platform for companies to build, customize, and deploy autonomous agents that support employees and customers.

With Agentforce, customers have access to out-of-the-box templates for quickly building and customizing autonomous AI agents that meet their specific business requirements. Utilizing an LLM's language and reasoning capabilities, these agents are able to carry out business tasks using a company's CRM data, external

data, and metadata while adhering to strict privacy and security guidelines.

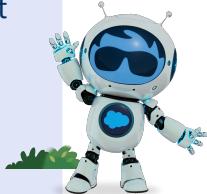
They can also seamlessly escalate complex, high-priority queries to human agents.

New

Agent Astro Tip

Agents are defined by 5 key attributes:

- **Role:** What is the agent's role?
- **Knowledge:** What topics or data will the agent be knowledgeable about?
- **Actions:** What actions will the agent take?
- **Guardrails:** What are the guidelines or constraints for the agent?
- **Channels:** Which channels will we deploy these agents on? (e.g., website, Slack, email, voice, etc.)



Agentforce Overview

New

[**Partner First Call Deck:**](#) Slide presentation shared by PAMs to introduce partners to Agentforce.

New

[**Agentforce Use Cases:**](#) Get inspired with practical, custom use cases across industries, so you can tailor your agents to your business and customer needs.

Agentforce General Resources

[**Agentforce Website:**](#) In-depth collection of demos, details, and more.

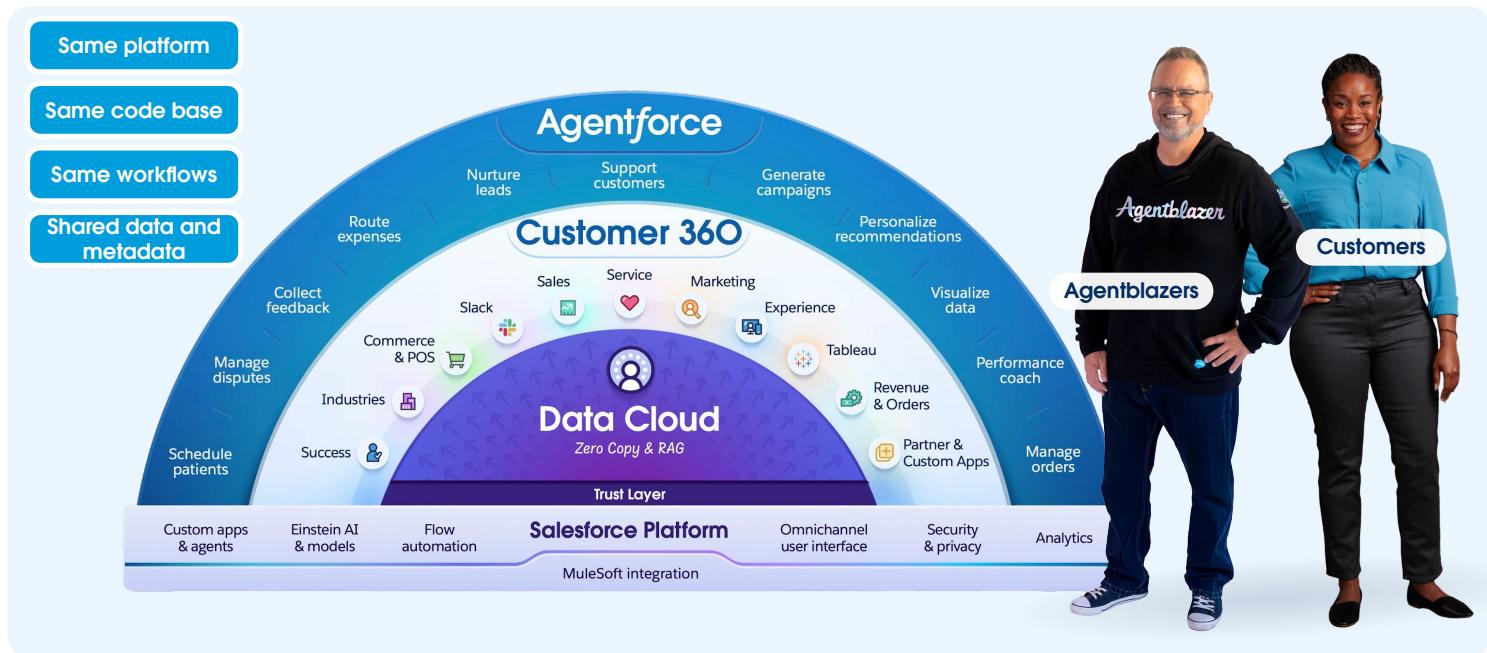
[**Library of Demo Videos:**](#) Discover how Agentforce brings together humans + AI + data + actions.

[**Agentforce Enablement Resource Library:**](#) An extensive library of technical resources for Agentforce enablement.

1. Get to Know Agentforce

New

The Agentforce Advantage

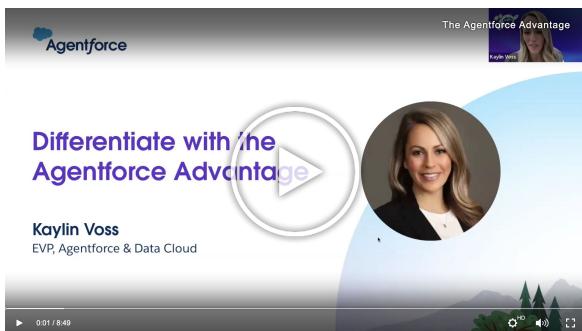


Agentforce leverages the full power of the Salesforce platform, from our Hyperforce foundation to Data Cloud, and all the apps that create a Customer 360. This is your unmatched digital labor platform.

Learn the Agentforce Advantage

New

Why Agentforce? Hear Kaylin Voss, EVP of Sales, Agentforce & Data Cloud, explain the unique advantages of Agentforce.



[Watch Video](#)



Agent Astro Tip

Agentforce is proven to be **16x faster** and **75% more accurate** than DIY-built AI solutions.*

Agentforce natively includes a data layer, an application layer, and an agentic layer all in one powerful infrastructure.

Don't miss the video to the left where you will hear from a top Salesforce sales leader on the details of this competitive advantage and what it means to your business as a partner.

*Source: A Valoir Report, February 2025

Why it Matters for Partners

- Agentforce creates new customer demand and an incredible opportunity for partners to co-create innovative Agentforce solutions for customers with a high propensity to buy.
- Agentforce Agents make use of industry-leading Salesforce applications to deliver transformative experiences across sales, service, commerce, marketing, and industries.
- The shift to agents creates an even bigger opportunity for partners beyond just co-creating agents and implementations, but with monetizing high value consulting focused on business change. According to IDC by 2028, for every \$1 Salesforce makes, our partner ecosystem makes \$6.93.
- Partners extend the use of Agentforce through partner actions, agent actions, zero copy data, and implementation.

New

There has never been a better time to be a Salesforce Partner



Hear from Phil Samenuk, SVP, Alliances & Channels, on the massive success seen by Salesforce Partners with Agentforce and the huge opportunities ahead.

[Click Here to Watch Video](#)



2. Get AI Certified

Certification Prep Tools, Exam Resources, Agentblazer Details and More

In this stage of your Agentforce Journey, we'll focus on getting your team certified and becoming an Agentblazer. Discover the certification options available and follow our guided steps to prepare for your exams.



2. Get AI Certified

Get Your Agentforce Certifications

Exams are free until the end of 2025

Become a Certified AI Associate

1. [Review the exam guide](#)
2. [Complete the Trailmix](#)
3. [Complete the Cert Prep Module](#)
4. [Earn Certification](#)

Become a Certified Agentforce Specialist

1. [Review the exam guide](#)
2. [Build your first Agent](#)
3. [Complete the Cert Prep Module](#)
4. [Earn Certification](#)

Additional Certification Resources

1. [Verify your certification status](#)
2. [Enroll in expert-led course on Trailhead Academy](#)
3. [Exam Candidate Code of Conduct](#)
4. [Trailhead GO Mobile App](#)



Coming Soon: Implementation Expert Distinction in Navigator

Soon, partners will have the opportunity to earn the brand new “Implementation Expert” Navigator Distinction in products like Agentforce.

The number of certified individuals at your company is a crucial factor in achieving this distinction, along with other criteria. Therefore, it's essential to prioritize certifications across your team.

[Learn more here](#)



Agent Astro Tip

1. The Agentforce certification exams are free until the end of 2025, so certify as many team members as possible and establish your company as a leader in the Agentforce ecosystem.
2. One of the key insights we've gained with Agentforce is that the most successful sales cycles involve all team members, not just those in technical roles, being well-versed in the product. We strongly recommend that every member of your team take advantage of these free exams to become certified.

2. Get AI Certified

New

Become an Agentblazer

Elevate your AI career by becoming an Agentblazer today! Master in-demand AI skills through our specialized Trailhead modules, unlock exclusive rewards, and join a global network of Agentblazers to expand your expertise, discover new use cases, hear from product experts, and accelerate your career growth.



LEVEL 1

Champion

- Learn AI and Agentforce fundamentals
- Understand Data Cloud and governance
- Build your first agent

[Get Started](#)

LEVEL 2

Innovator

- Identify use cases for your business
- Create custom agents with Agent Builder
- Set up and customize Agentforce for Service and Sales

[Learn More](#)

LEVEL 3

Legend

- Manage & customize across the Agentforce lifecycle
- Earn the Agentforce Specialist certification

[Coming Soon](#)[Learn More about Agentblazers Here](#)

Agent Astro Tip

Each Trailhead module you complete earns you a badge and points toward your Agentblazer Status, highlighting your skills and hands-on experience in building autonomous agents.

Advance from Champion to Legend to gain the expertise needed to drive transformative change in your organization and achieve your career goals.



3. Deepen Your Expertise

Events, Demo Orgs, Enablement Tools, Resources, Navigator Distinctions

This step of your Agentforce journey is dedicated to preparing for implementation. Here, you will find comprehensive trainings, essential tools, and resources such as demo orgs, FAQs, and help desks to ensure your success. This chapter also outlines the steps to earn your Agentforce Implementation Expert distinction in Navigator.



3. Deepen Your Expertise

Deepen Your Expertise with Advanced Content and Resources

Events, Cohorts & Workshops

[Video Hub \(Includes webinars, release deep dives & demos\)](#)

[Agentforce Upskill: GTM Webinars](#)

[Agentforce World Tours](#)

[Additional Events](#)

[See our Marquee events list in the Drive Demand chapter](#)

Demo Orgs & Enablement Tools

[Product & Org Access](#)

[Simple Demo Org \(Exclusive to Salesforce Partners\)](#)

[Agentforce Roadmap](#)

[Enablement Resource Library](#)

[Salesforce Foundations \(free Salesforce feature access for customers\)](#)

Partner Support & Community Resources

[Agentforce Collaboration Group in Partner Community](#)

[Agentforce FAQs](#)

Agent Astro Tip

1. Be sure to request an SDO - Salesforce's most popular demo environment, offering an advanced tool for pre-sales opportunities. It includes licenses and features like Agentforce, showcasing the full range of Salesforce solutions without needing additional provisions.
2. Prioritize attending Agentforce trainings to build your company's expertise level. Completing these trainings sets you up for future Partner Program benefits and opportunities in FY26. More details coming soon!
3. Don't see any events near you? Revisit this page soon for more events. We are adding to the calendar regularly.

New

Agentforce Implementation Expert Navigator Distinction

What is Navigator?

Navigator showcases the depth and breadth of a partner's expertise (comprising knowledge, experience and implementation quality) across products, industries and services.

How do key stakeholders utilize Navigator Distinctions?

Customers

Browse and narrow down potential partners based on their knowledge, experience and project quality.

Salesforce Sales

Make informed, defensible recommendations about suitable partners to end-customers.

Partners

Showcase product knowledge, industry experience, and customer service to potential customers, including in RFP responses & Press Releases.



What is an Implementation Expert?

This new navigator distinction allows partners to demonstrate readiness and drive customer success with a greater degree of product-specific, defensible expertise.



Agent Astro Tip

- The Agentforce Implementation Expert distinction will be available for search in Partner Finder and AppExchange in July 2025. It's crucial to prepare your team now to get ahead of the competition.
- Implementation Workshops are live events with limited places and registration available on a rolling basis.
- Some Implementation Expert Workshops are available now with more released weekly on [our calendar](#).
- Partners will be able to track progress towards Implementation Expert in Partner Community in July 2025.

Implementation Expert Criteria

To earn this distinction, partners must meet the following criteria (subject to change):

- 5 credentialed individuals ([Salesforce Certified Agentforce Specialist](#))
- 5 CSAT-validated Agentforce projects
- 10 individual completions Delivery Ready course (access [here](#)) and passing mark for course quiz
- 10 individual completions Agentforce workshop (register [here](#)) and passing mark for workshop quiz.
 - Certain workshops completed in Q4 FY25 are eligible ([list here](#)).

Resources

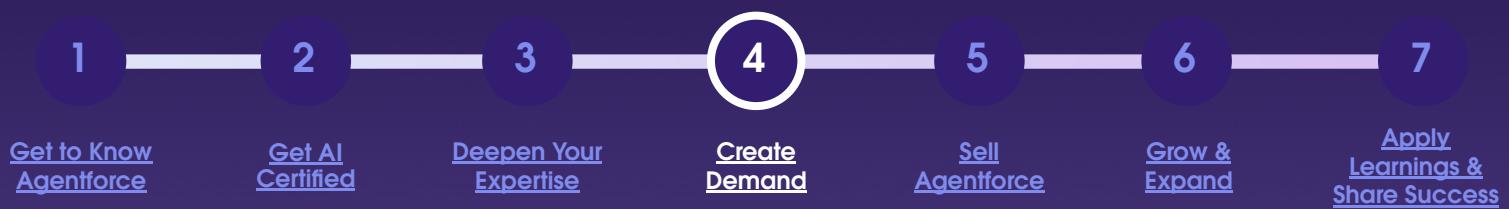
- [FY26 Overview - Project Submission and CSAT](#)
- [FY26 Consulting & MSP Navigator Overview](#)
- [Deliver Like Salesforce course](#)
- [Enablement Event Calendar](#)
- Partner Community [Program Overview](#)



4. Create Demand

GTM Strategy Tools, GTM Resources

This step of your Agentforce journey focuses on going to market. Here, you'll find tools to shape your GTM strategy, resources to support your launch, and details on co-marketing funds to promote your Agentforce offering.



GTM with Agentforce



GTM Strategy Development

[Agentforce Upskill Webinars:](#)

GTM Readiness & Use Cases

[Salesforce Partner On-Demand GTM Courses](#)

[Co-Marketing Opportunities](#)

[Plan ahead for Salesforce marquee events on the next page](#)

GTM Tools & Resources

[Best Practice Video: Agentforce Bill of Materials](#)

[Overview Deck: Agentforce Bill of Materials](#)

[Zip File Download: Agentforce Bill of Materials](#)

[Dreamforce '24 Go-To-Market Kit](#)

Get Listed as Agentforce-Ready

[Partner Connect Pocket Guide for Partners:](#)

Partner Connect is the new go-to place for listings of all Agentforce-Ready partners. Sign up today to help customers & AEs find your business.

Agentforce Marketing Funds

This round of applications is currently closed. Stay tuned for updates on our next round of applications in 2025.

Promote your Agentforce practice using specialized Market Development Funds.

[\(Applications Closed\) Market Development Funds Program Overview](#)

[\(Applications Closed\) Apply for Funds](#)



Agent Astro Tip

A huge key to success is making sure your business is easily discoverable as Agentforce-Ready by customers and Salesforce AEs. Get started by following the steps below:

- 1. [Sign Up for Partner Connect:](#)** This is the official resource to find Agentforce-Ready partners starting.

4. Create Demand

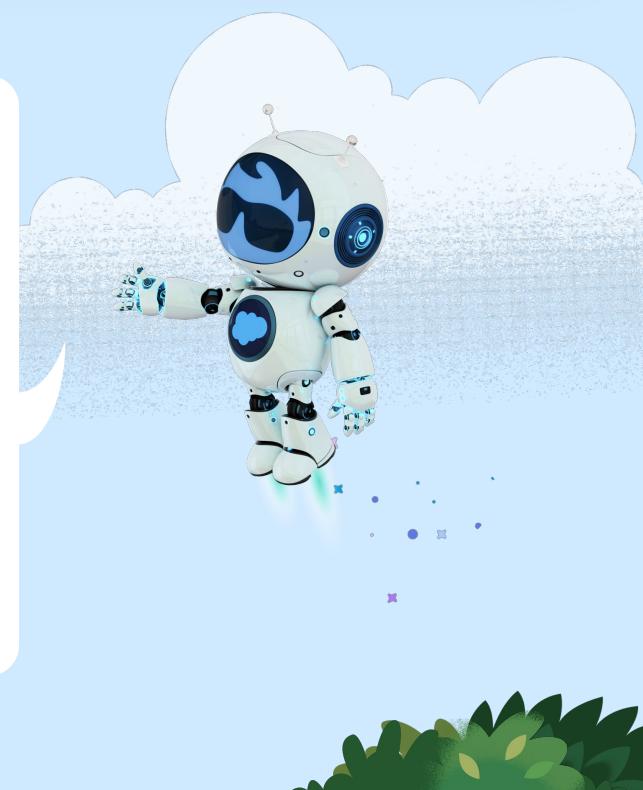
Drive Demand at Upcoming Salesforce Marquee Events



Event	About	Location	Date
Agentforce World Tours	Build and deploy your first AI Agent and discover what AI was meant to be with 135+ expert-led sessions and demos. All in one day, all for free. Register here.	Global Tour	Now - Winter 2025
Tableau Conference	Three days packed with 200+ breakout sessions, 60 hands-on trainings, keynotes, community-led learning, training and certification add-ons, and more.	San Diego & Salesforce+	April 15-17, 2025
Connections	Salesforce Connections is the official event for all things marketing and commerce in the Salesforce realm.	Chicago & Salesforce+	June 11-12, 2025
Dreamforce	Mark your calendars for an epic celebration of customer success and the most impactful event for your business.	San Francisco & Salesforce+	October 14-16, 2025

Agent Astro Tips

- **Why attend:** Discover the latest innovations and strategic priorities for partners. Network with customers, prospects, peers, and leadership.
- **How to maximize value:** These events allow opportunities to sponsor, speak in sessions, host ancillary events, attend additional trainings, host meetings, connect with sales, and more!
- **More info coming soon:** the list above will be regularly updated with additional details such as dates & websites so check back regularly.





5. Selling Agentforce

Pricing, Packaging, Differentiation, Sales Resources, Win Demos, Sales Plays

This step of your Agentforce journey is dedicated to selling Agentforce. Here, you'll find pricing details, strategies to differentiate your business, sales resources like pitch decks and value calculators, and customer win demos. You'll also learn about a key sales play - Agentforce Activator.

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[Grow & Expand](#)

[Apply Learnings & Share Success](#)

New

Winning Sales Playbook

Agentforce Winning Playbook



Land agent vision at executive level



Use successful customer references



Inspire with Customer Zero



Demo our deeply unified platform



Position credible value delivery plan



Match pricing to agentic maturity



Educate on trusted agentics

Agent Astro Tip

In the spirit of enhanced partnership, our sales team is excited to share the playbook we're using to succeed with Agentforce in FY26.

This playbook was compiled from feedback on our largest Agentforce deal wins from last year. We noticed that the same winning strategies consistently emerged, so we distilled this information into a playbook that your teams can use alongside the Salesforce sales teams.



Partner Resources for the Winning Playbook

- **Land agent vision at executive level**
 - Coming soon - Win the CIO Webinar with Shibani Ahuja
- **Use successful customer references:**
 - Agentforce customer story library
 - Submit your own Agentforce story
- **Inspire with Customer Zero**
 - Salesforce's Customer Zero Story
- **Demo our deeply unified platform**
 - Set up your demo org today
- **Position credible value delivery plan**
 - Agentforce ROI Calculator
- **Match pricing to agentic maturity**
 - We are updating our Agent pricing model. More details coming soon.
- **Educate on trusted agentics**
 - Agentforce use case library

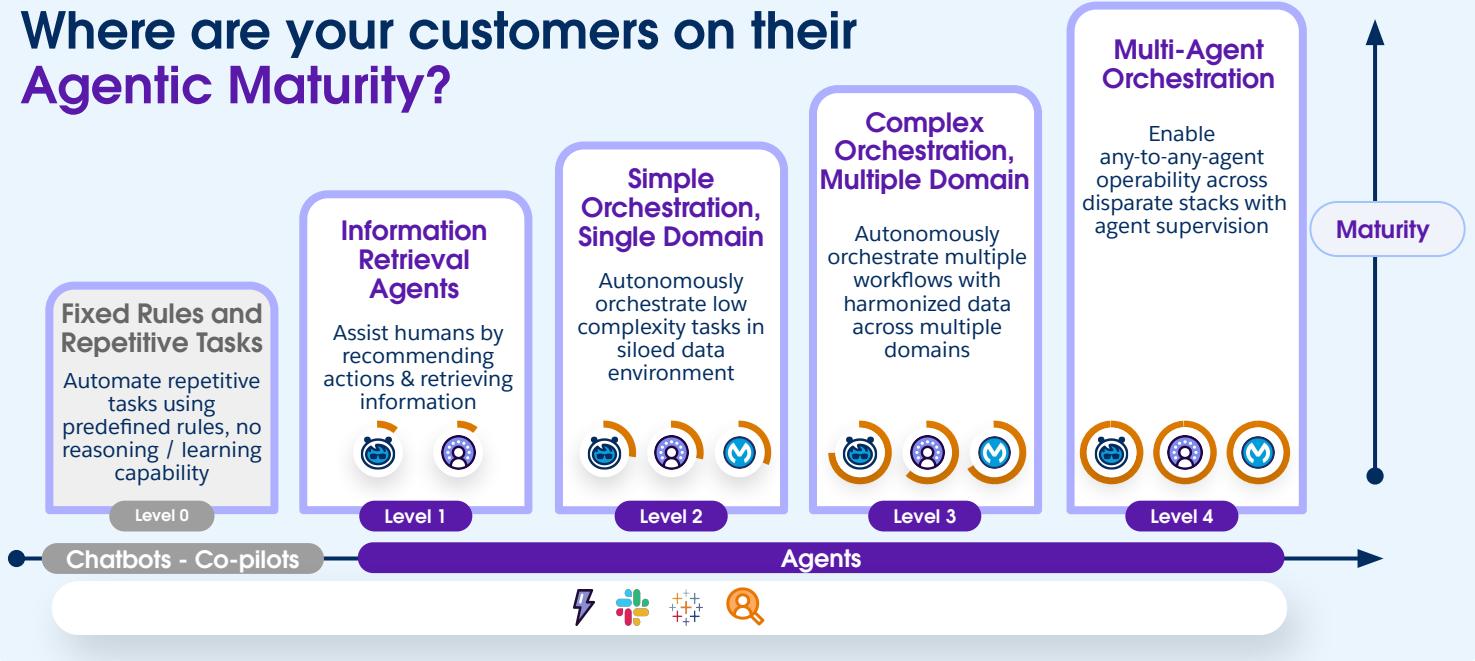
New

Watch this video to learn more

New

Agentic Maturity Model

Where are your customers on their Agentic Maturity?



Not all use cases are created equal, and not all partners are at the same level of maturity in their agentic journeys. This maturity model is an internal tool used by Salesforce to align the complexity and sophistication of agentic use cases with their business impact.



New

Learn the Maturity Model: Hear Shibani Ahuja (SVP of Enterprise IT Strategy, Salesforce) and Mike Jortberg (Global Sales Director, Slalom) in the latest episode of CIO Online's DEMO as they demo the Agentic Maturity Model.



[Watch Video](#)

Agent Astro Tip

When identifying the right agentic use case for your customer, it's essential to match the agent with the customer's level of readiness and maturity.

Offering something too complex can result in poor adoption and consumption, thereby reducing the likelihood of agentic expansion.

Equip your teams with this maturity model to help them develop appropriate strategies for each customer.

New

Selling to the Chief Information Officer (CIO): Win more deals & unlock the AI opportunity

Win the CIO: Proven Techniques to Increase Your Win Rates



Win the CIO

Shibani Ahuja
SVP, Enterprise IT Strategy

The role of the CIO has never been more important. As AI agents become central to the future of enterprise technology, CIOs have evolved from managing infrastructure to orchestrating AI strategies and driving real business value.

Watch this webinar to enhance your sales pitches to CIOs, increasing your win rates & deal sizes.

New

Learn more in this on-demand webinar

Why the CIO? Why Now?

As AI agents become central to the future of enterprise technology, chief information officers play a pivotal role in leading this transformation and tapping digital labor to achieve their organization's AI objectives.

[Learn More](#)

4-Step Roadmap for CIOs

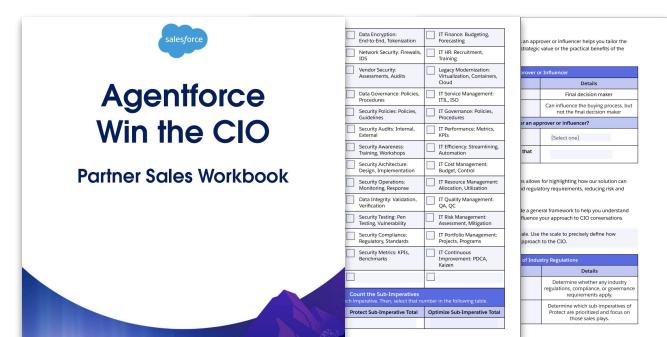
To provide a structured path for CIOs and IT leaders, we developed the Agentic Maturity Model, outlining key stages of progression and actionable steps for advancement.

[Learn More](#)

New

New Resource: Partner Sales Workbook

Download this [interactive workbook](#) to help you tailor your CIO sales strategies for each of your upcoming sales cycles. For more information on how to use it effectively and why it's valuable, view the on-demand webinar at the top of this page.



[Download the Workbook](#)

5. Selling Agentforce

Additional Sales Resources



Pricing & Packaging

[Agentforce Pricing + Business Value Selling \(Webinar Recording\)](#)

[Agentforce Pricing + Business Value Selling \(Slide Deck\)](#)

[Agentforce ROI Calculator](#)

Differentiation & Use Cases

[Coming Soon: “Implementation Expert” Distinction in Navigator](#)

[AI Use Cases Library](#)

Sales Resources

[Salesforce AI Readiness Assessment Tool: a fast way to engage prospects and start meaningful conversations](#)

[Prerequisites for Quick Wins with Customers](#)

[Agentforce Sales Agent Pitch Deck](#)



New

Top Agentforce Use Cases:
Hear Kaylin Voss, EVP of Sales at Agentforce & Data Cloud, explain the most common Agentforce use cases we see in sales cycles today.



[Watch Video](#)

Agent Astro Tip

Want to discover what Agentforce can do for your customers?

You can now give your customers free access to Salesforce features with Foundations.

This allows you to unlock key features across Sales Cloud, Service Cloud, Marketing Cloud, Commerce Cloud, and Data Cloud.

[Learn more here](#)





6. Grow & Expand

Drive growth through consumption, track your projects & log your leads

You've started your Agentforce journey. Now, how can you expand and grow to the next level? This chapter offers advice on the customer growth journey, the importance of consumption, and tools to track your leads and projects.

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[Apply Learnings & Share Success](#)

New

Unlocking Unlimited Growth



Adoption is the Key to Customer Growth, and Partners Provide a Unique “Unlock”

With Agentforce, our sales process transforms into an ongoing cycle of growth.

However, the key to this growth lies in consumption and adoption.

New

[Watch this video to learn more](#)

1. Identify

Start simple & make it real

When identifying the first agent for a customer, keep it simple by starting with a use case that delivers immediate value. This lays the groundwork for a seamless integration into their existing ecosystem.

2. Commit

Clearly demonstrate the vision & value proposition

Always consider the [customer's agentic maturity](#) when driving commitment. Lead with the vision and value of the agent, such as increasing productivity, reducing costs, or both.

3. Deploy

Quality implementations are the key to future success

Quality implementation of agents is crucial for your future success with Agentforce. When executed properly, agents deliver immediate and measurable value to customers. Use the Customer Success Score Card ([details on the next page](#)) to track your implementations.

4. Consume

ROI can't be demonstrated without consumption

As customers continue to use their agents, the immediate and measurable value continues to grow, creating strong momentum that brings you back to the first step (identify). By this point, you have solidified your position as their trusted agentic advisor. The ROI from their initial agent often justifies the cost of the next agent, and the next, fueling an ongoing cycle of growth and maturity development. Without consistent consumption, however, the ROI remains unproven and momentum can stall.

Track Your Projects & Leads



Log Your Leads

To receive lead credit, all leads must be logged in the Partner Community for review by the Sales Development Team.

- To get started, visit the [Partner Community - Business Page](#)
- Consult the [FY2 Salesforce Partner Program Policy](#) for information on referrals and sourced opportunities.
- Reference [this resource](#) for help on tracking leads through the Partner Community

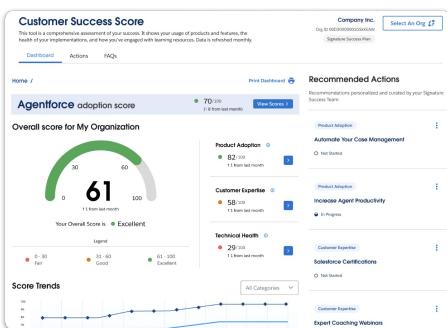
Agent Astro Tip

Why are these steps important? Projects are an important contributor to a partner's Navigator score.

By tracking your leads and projects, Salesforce is able to give your business proper credit for all the hard work you are doing with Agentforce.

This also ensures that your business receives all the benefits you are due.

New Now available to partners: Customer Success Scorecard



- Available to partners with customer consent
- Adoption insights available now for Signature and Premier customers

Track Your Project Status

- Login to [Partner Community](#), click Manage and then Projects.
- Click New Project and complete the project information.
- Customer Org ID is required. Select the type of Customer Org (Salesforce, Slack, etc) and enter the Org ID.
- Select correct Agentforce Product under Einstein GenAI category.
- Add Customer Contact info and validate the customer consent.
- Send optional CSAT Survey. (Note: Partner will have ability to retroactively send CSAT once project is complete.)

[Learn More Here](#)



7. Apply Learnings & Share Success

Review and apply learnings, prepare press releases, share win stories

Now that you've launched with Agentforce, this chapter focuses on your next steps for amplifying your wins. This includes logging your leads with Salesforce, sharing your success stories, and collaborating with Salesforce PR on your press releases.

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Agentforce Lessons Learned

Podcast

Inside Agentforce: "Agent" Miguel Milano and Jim Steele Discuss Digital Labor and Agentforce Learnings



Tune in to hear "Agent" Miguel Milano, President & CRO at Salesforce in conversation with Jim Steele, Salesforce's President of Global Strategic Customers & Partners, discussing insights on digital labor, lessons learned since the Agentforce launch, and Salesforce's ask of partners.

[Listen Here](#)
New

New Podcast

Inside Agentforce: Driving Agentforce Success in Key Industries



Tune in to hear Salesforce's top AMER Industry Sales Leaders (Alexa Vignone, Mark Sullivan, Connor Marsden, Adam Alfano) share critical insights into agentic use cases, the importance of product knowledge, Agentforce lessons learned, key updates to their team structures and more.

[Listen Here](#)
New

New Video

Agentforce Lessons Learned



Hear Steve Corfield, Salesforce's EVP & GM - Global Alliances & Channels share the key lessons we've learned from our first year of Agentforce & the partner engagement opportunities.

[Watch Here](#)

Agent Astro Tip

These podcasts and videos offer a fantastic opportunity to hear directly from top Salesforce sales leaders about their key learnings from the Agentforce launch and how their teams are applying these insights to their FY26 strategies.

Check back regularly to find more podcasts & insights!



Highlight Your Agentforce Success

Partner Story Submissions

Promote your deal wins, go-lives, and success stories to AEs and customers. Sharing these stories not only boosts your business's visibility but also increases your chances of being featured at future Salesforce events and presentations.

- [Submit your stories here](#)
- Coming Soon: Agentforce Partner Story Library



Agent Astro Tip

Sharing your deal win, go-live, and success stories can serve two powerful purposes.

1. It can be used to promote your company to Salesforce AEs, pushing you to the forefront of their minds for future deals & opportunities.
2. It opens the door for potential co-marketing opportunities and/or Partner benefits



Agentforce Press Release Process

Do you have an Agentforce story you want to distribute over the newswire? Follow the instructions below to submit press releases for Salesforce review.

- [Follow these guidelines](#) to submit press releases for Salesforce review.
- Reach out to SFPartners@fhvox.com with questions.

Thank you!

Visit the Hub and explore more!

Not finding what you're looking for in this guidebook? [Fill out this feedback form](#) to help us improve this resource.

