



Agentforce Playbook



Contents



1 | Introduction

[Go to section](#)

2 | Campaign overview

[Go to section](#)

3 | Target audience

[Go to section](#)

4 | Campaign approach

[Go to section](#)

5 | Key messaging

[Go to section](#)

6 | Campaign assets

[Go to section](#)

7 | Campaign flow

[Go to section](#)

8 | Campaign timeline

[Go to section](#)

9 | Helpful resources

[Go to section](#)

10 | Log your leads

[Go to section](#)

11 | Key Agentforce Slides

[Go to section](#)



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:

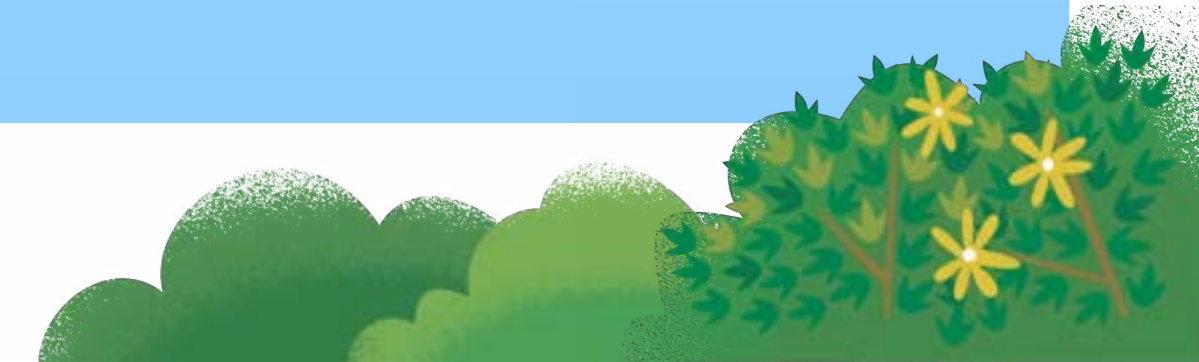
- Difficulty in handling high volumes of inquiries
- Lack of data to deliver personalized customer experiences
- Data privacy and compliance concerns
- Poor coordination between automated systems and human agents

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

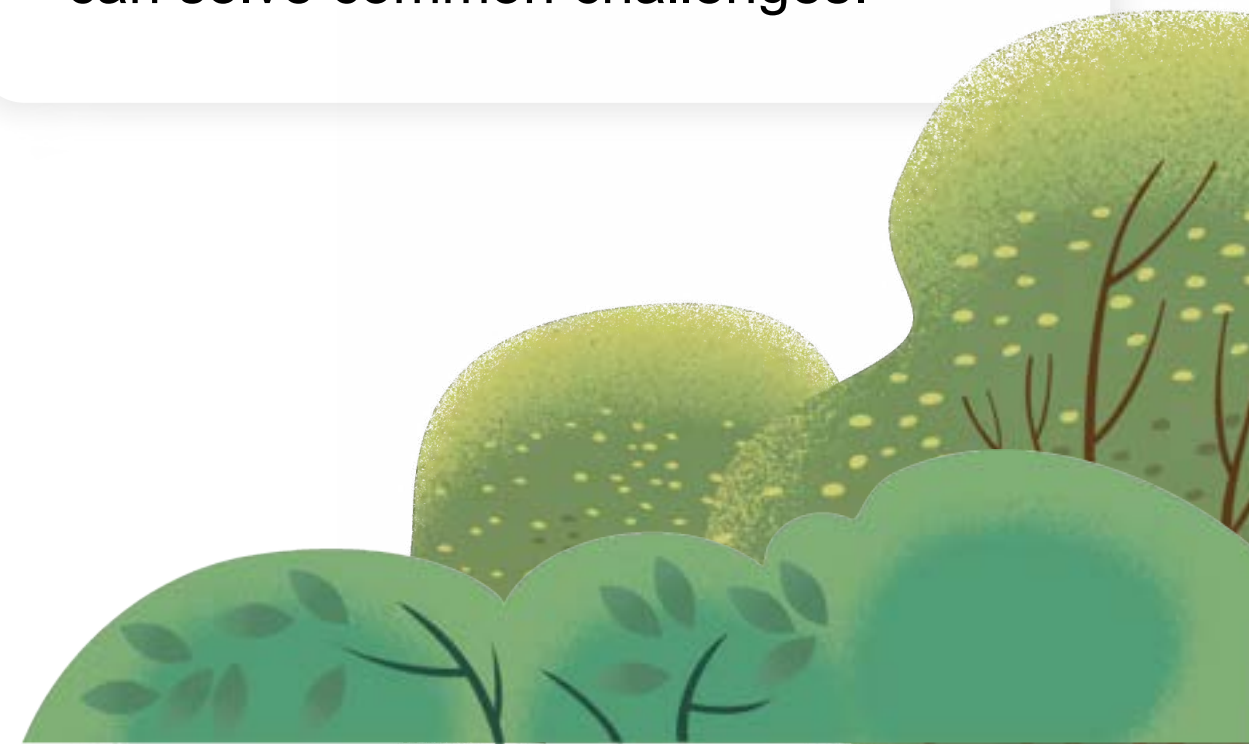
Share key services, explain how you work with Salesforce and curate tailored resources.

Industry use case template

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

Landing page

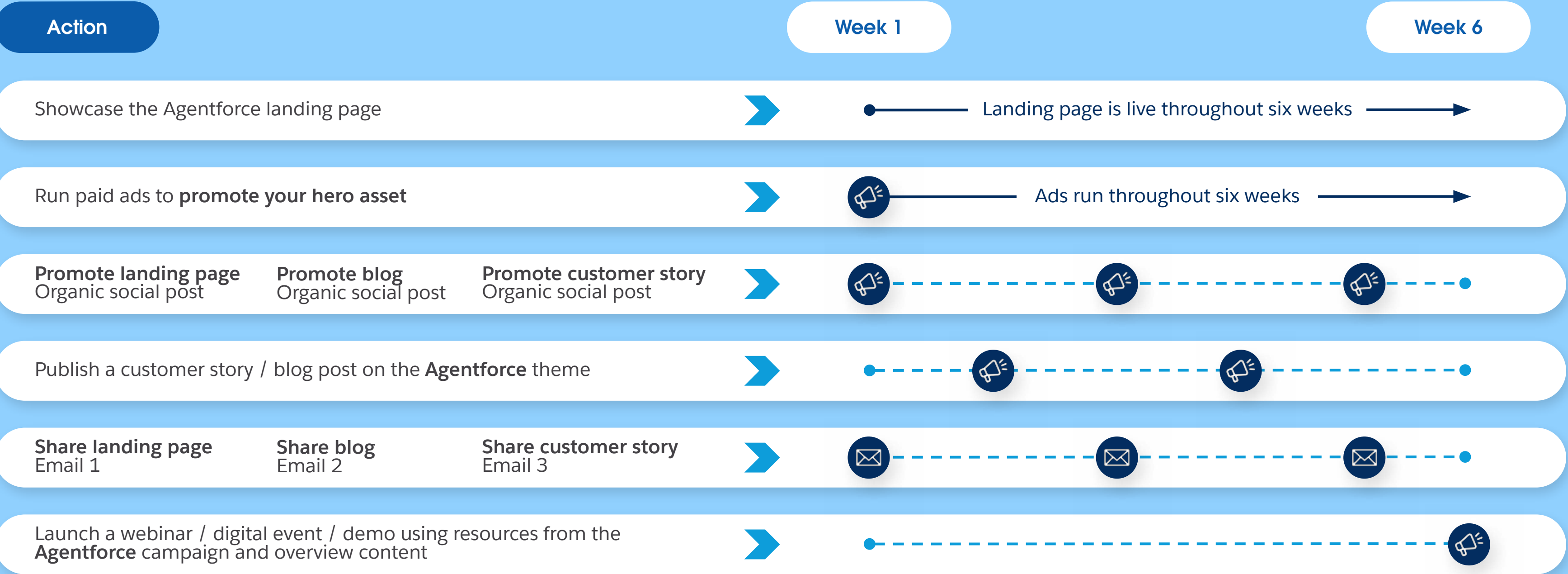
Highlight key features like seamless integration, automation and customization.



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



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 image shows the Salesforce Partner Community Business page and a detailed view of the lead submission form. The top section, titled 'Business', includes navigation links (Home, Collaboration, Learn, Business, COVID-19) and buttons for 'New Lead' and 'New Project'. It features three main cards: 'Leads' (Submit your first lead), 'Opportunities' (No opportunities. Submit a lead), and 'Projects' (Create your first project). Each card contains a flow diagram illustrating the process from submission to completion, including steps like 'Submit Lead', 'Convert Opportunity', 'New Project', and 'ACV Credit and Referral Fee (if applicable)'. Below this, a 'Details' form is shown with various input fields and sections.

Details

Primary Product of Interest *
-- Select a Product --

Additional Products of Interest
None selected

Purchasing Timeframe *
-- Select a Timeframe --

Total Potential Users * ⓘ
-- Select One --

Potential Sale Value
-- Select a Value --

Are you working with a Salesforce account executive?
Enter account executive name

Is this lead associated with a Salesforce campaign? ⓘ
Enter 18-digit Campaign ID

☐ We plan to use third parties (subcontractor, intermediary, etc.) to assist with the sale of salesforce.com products and services.

Goals * ⓘ
1. What are the customer's technical requirements?
2. What are the customer's business requirements?
3. What solution is the customer using now?
4. What other solutions are the customer evaluating?

Pains *

Next Steps *

Cancel Save Draft 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.

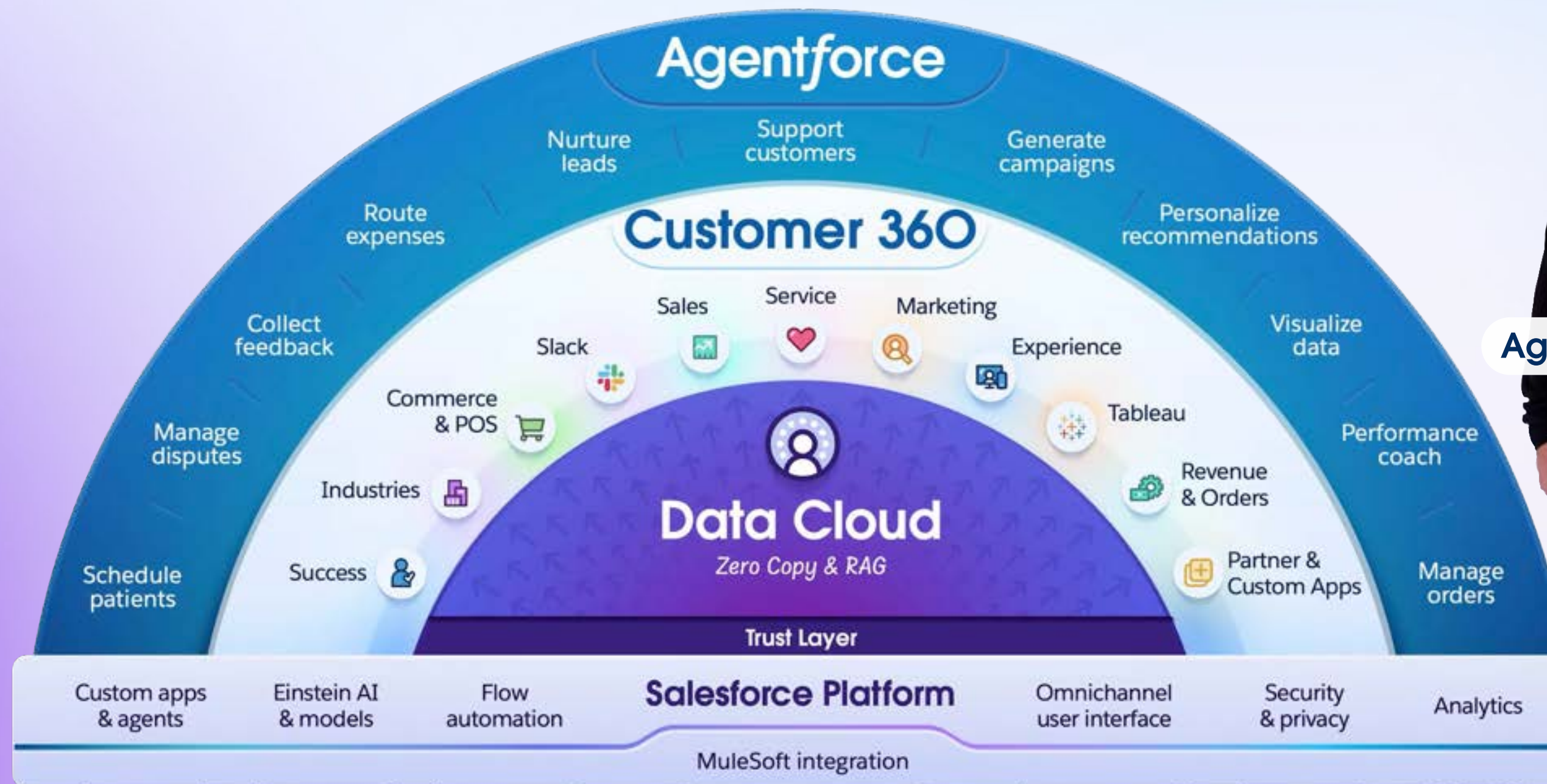
For more, check out the GTM Resources App or the Agentforce campaign Zip file.



Agentforce Your Digital Labor Platform



salesforce



Agentblazers

Customers

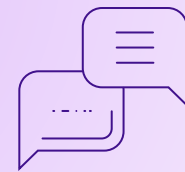


Deploy agents across your business to become a credible reference



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

salesforce

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**

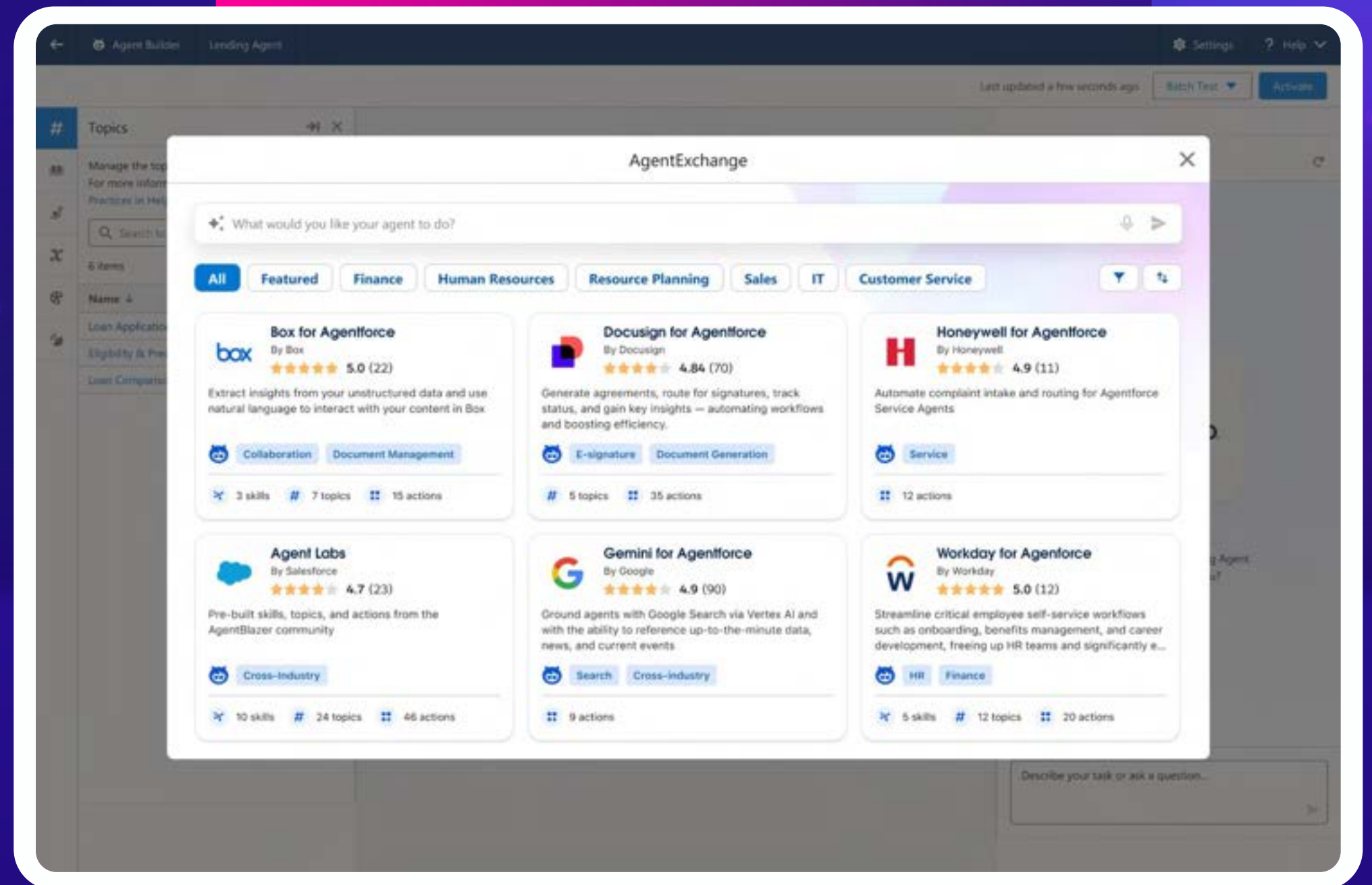
Platform for **building, marketing, and selling Agents**

Agentforce Prompts, Topics & Actions

GA | Now

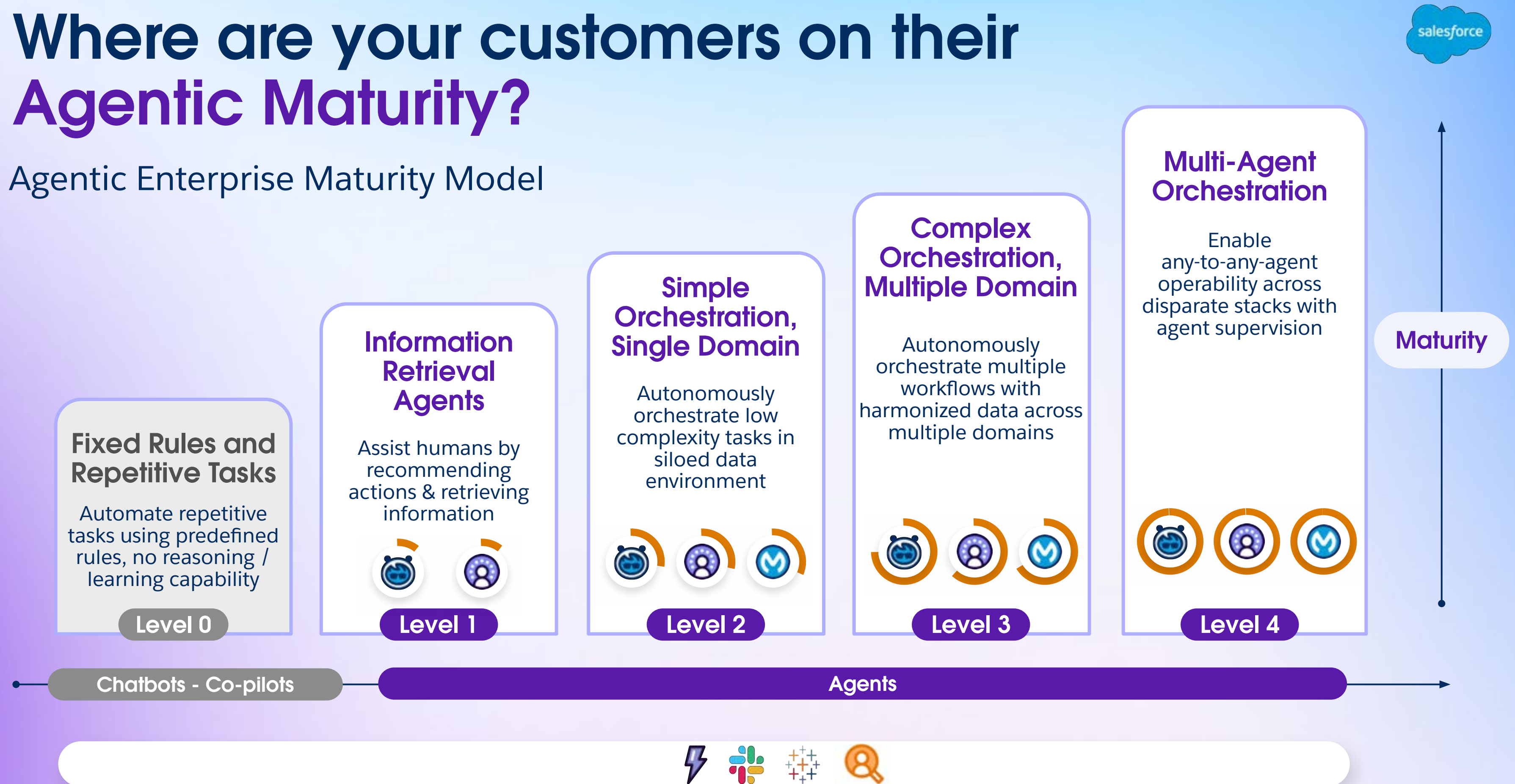
Agentforce Templates

GA | April



Where are your customers on their Agentic Maturity?

Agentic Enterprise Maturity Model





Thank you

