

SALESFORCE SUCCESS PLANS | AGENTFORCE

Achieve your ambitious goals with Agentforce using innovative tools, guidance, and support

You're looking to use Agentforce to build and customize autonomous AI agents to support your employees and customers 24/7. But where do you begin?



Meet Salesforce Success Plans

Where proven strategies powered by humans and agents come together with the #1 AI CRM to drive success every day.

Our [three levels of Success Plans](#) offer innovative tools, guidance, and support from a team of experts to help you build, customize, test, deploy, and monitor your AI agents.

- Learn how to build and work with agents to scale your workforce with self-paced and expert-led training
- Discover data quality strategies and integration best practices with product workshops, so your agent can always draw from an accurate single source of truth
- Solve issues quickly with fast Technical Support so you can focus on deploying agents to engage with customers and prospects

Whether you're looking for self-guided resources or a personalized partnership, we have a plan that will put you on the path to success.

Success Plans



Standard

Self-Guided Resources



Premier

Personalized Expert Guidance



Signature

Proactive, High-touch Partnership

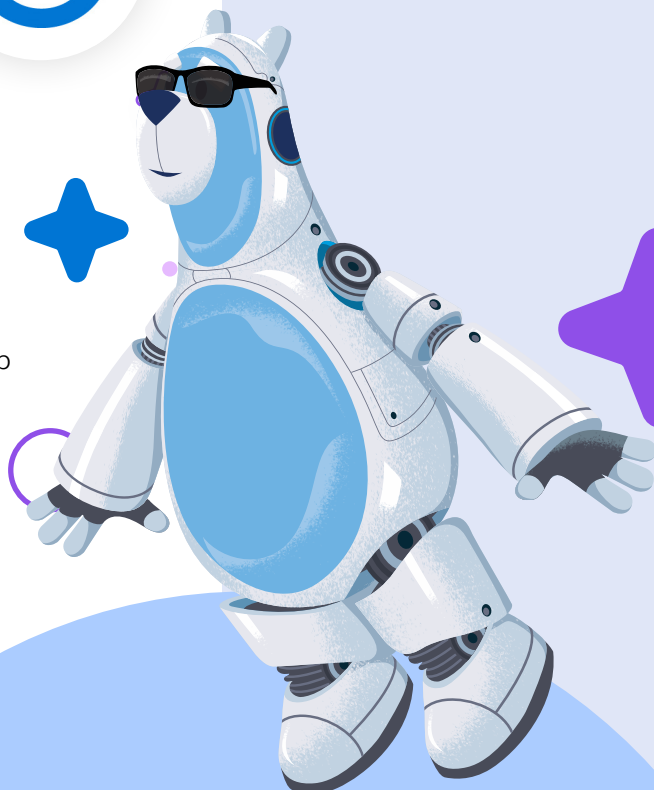


115%

ROI for Premier customers¹

104%

Additional ROI for Signature customers²



¹The Total Economic Impact Of Salesforce Premier Success Plan, a commissioned study conducted by Forrester Consulting on behalf of Salesforce, September 2024. These results are for a composite organization.

²The Total Economic Impact Of Salesforce Signature Success Plan, a commissioned study conducted by Forrester Consulting on behalf of Salesforce, September 2024. These results are for a composite organization.

Standard Success Plan Features

Set your company up for success with free, always-on Agentforce resources and essential support for all your needs.

Trailhead¹

Discover Agentforce features and get practical experience on how to seamlessly integrate data from any system, automate complex workflows, and more with our free online learning platform.

Trailblazer Community²

Join Community Groups, ask questions, learn from fellow Trailblazers who have built agents, and grow your professional network.

Salesforce Help

Ask questions and get answers fast from Agentforce on Help, how-to videos, [documentation](#), knowledge articles, release notes, and more.

Technical Support

Submit cases online for help with your Agentforce solution.

Check out these resources

1 Trailhead

Get Ready for Agentforce

Learn how Agentforce fits your business goals, build your first agent, and build a plan for AI success.

2 Trailblazer Community

Community Topics - Agentforce

Ask questions, get answers, learn best practices, and share experiences as you continue your journey.

Premier Success Plan Features

Scale your workforce with AI agents, and discover new ways to get more value every day with personalized programs, expert guidance, and expedited support. Premier includes everything in the Standard Success Plan, plus these features.

Onboarding

Connect with Agentforce experts to align your goals with product capabilities and craft a strategy that delivers tangible business outcomes.

Success Path

Track objectives and goals with a roadmap that shows you how to achieve your desired outcomes in building expertise, driving adoption, and maintaining the technical health of your implementation.

Success Review

[Review](#) past recommendations and achievements with a Success Guide up to two times per year. Success Reviews provide actionable insights from your Customer Success Score and foster personalized guidance, realignment of your goals, and next steps for your success.

Expert Coaching¹

Enable your teams with specialized one-to-one engagements. Get personalized guidance from Salesforce experts on your unique business use cases and discover the features and insights you need to achieve your goals

Instructor-led Training

Learn directly from Agentforce experts with live, instructor-led training. Discover how to set up key Salesforce features in just 60 to 90 minutes with workshops. Deep dive into Salesforce products with a 25% discount on multi-day immersive courses. Register for any available seat in the [catalog](#).

Bulk Certification Discounts

Get a 25% discount for bulk certifications for your team.

Developer Support

[Troubleshoot](#) up to 200 lines of custom code with our Salesforce experts to help you resolve any developer challenges.

Technical Support

Get [help](#) with any of your needs through Agentforce on Help and our Technical Support team through chat, phone, and case submission. Get a response within 1 hour for business-impacting issues.

Check out these resources

1 Expert Coaching

[Agentforce Sessions](#)

Sign up for a session and learn how you can enhance your understanding of Agentforce and put AI to work today.





Signature Success Plan Features

Clear a path for AI innovation and run at peak performance with your go-to advocate, specialized programs, and the fastest support. Signature includes everything in the Premier and Standard Success Plans, plus these features.

Customer Success Manager

Your [single point of contact](#) and advocate, who delivers proactive expertise and personalized recommendations, and engages with technical experts to address your in-depth Agentforce needs at every step of your journey.

Success Path

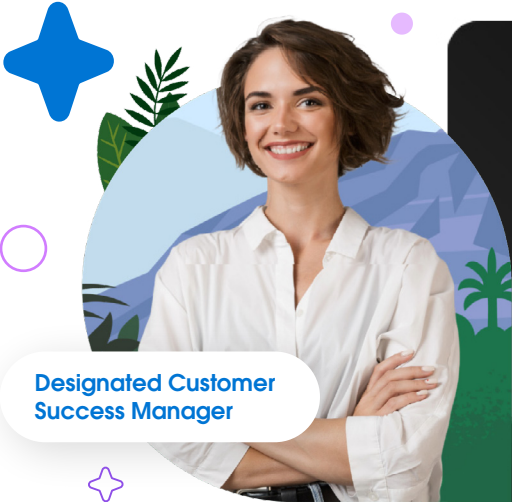
Partner closely with your Customer Success Manager to create a roadmap to stay on track with your objectives and goals of using AI and Agents to drive operational efficiencies across your organization.

Success Review

Review past recommendations and achievements, foster joint accountability, and realign on goals and next steps for your success.

Specialized Architect Reviews

Work with in-house architects to review, maintain, and enhance your Agentforce configuration, resolving design challenges and uncovering opportunities for maximum technical health and business scalability.



Designated Customer Success Manager

Your Success Path Timeline

Business Goal		30 days	60 days	90 days
1	Improve Agent Efficiency	Recommendation		
		Recommendation		
2	Enhance Customer Experience		Recommendation	
			Recommendation	
3	Optimize Service Operations		Recommendation	Recommendation
			Recommendation	Recommendation

Signature Success Plan Features (continued)

Annual Technical Health Review

Get a [comprehensive analysis](#) of your Salesforce environment with recommendations to minimize errors and inefficiencies for a lasting, healthy solution.

Instructor-led Training

Learn directly from Agentforce experts with live, instructor-led training. Discover how to set up key Salesforce features in just 60 to 90 minutes with workshops. Deep dive into Salesforce products with free multi-day immersive courses, available to your team. Register for any available seat in the [catalog](#).

Bulk Certification Discounts

Get a 35% discount on bulk certifications for your team.

Developer Support

[Troubleshoot](#) up to 5,000 lines of custom code with our Salesforce experts to help you resolve any developer challenges.

Technical Support

Get [help](#) 24/7, including holidays and weekends, with 15-minute response times for critical business-stopping issues. Signature customers also get exclusive access to a dedicated emergency hotline.



Success Plans for Agentforce Feature Comparison Chart

Find the right level of guidance and support to reach your goals faster

[View details on included and excluded products](#)

View details on included and excluded products			Standard	Premier <small>Includes Standard features</small>	Signature <small>Add on top of Premier Success Plan Includes Premier and Standard features</small>
Help Agent¹	Value Acceleration	Customer Success Manager			✓
		Customer Success Score²		✓	✓
		Success Path		✓	✓
		Success Review		Up to 2x per year	Up to 4x per year
	Technical Health	Proactive Monitoring²			✓
		Specialized Architect Reviews²			✓
		Key Event Management²			✓
		Annual Technical Health Review			✓
		Health Checks and Recommendations		✓	✓
	Product Adoption	Onboarding²		✓	✓
		Expert Coaching		✓	✓
	Customer Expertise	Workshops (60 - 90 Minutes)		✓	✓
		Courses (1 - 5 Days)		25% Discount	✓
		Bulk Certifications		25% Discount	35% Discount
		Trailhead	✓	✓	✓
		Trailblazer Community	✓	✓	✓
		Knowledge Articles and Documentation	✓	✓	✓
	Issue Resolution	Developer Support		200 lines of code review	5,000 lines of code review
		DORA Support (Digital Operational Resilience Act)	Available for purchase	✓	✓
		Technical Support	• Live help via: Help Agent and chat • Case submission response: 2 days during local business hours	• Live help via: Help Agent and chat, and phone • Case submission response: 24/7/365, 1 hour response for business-stopping issues	• Live help via: Help Agent and chat, phone and emergency hotline • Case submission response: 24/7/365, 15- and 30-minute updates for business-stopping issues
For more information			Included	30% of Net <small>(or included in UE & E1E)</small>	Custom

For more information

Contact your account executive to learn how we can help you fast-track your success today.

1-800-NO-SOFTWARE

www.salesforce.com

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The Help Agent may include references to features that are still in development. Customers should make purchasing decisions based on features that are available today.¹

Currently available for select Clouds²