



CRM Leadership Series 4 of 4 "Agentforce POC to Production"

Agentforce POC to Production

Methodology, Processes, and Deliverables

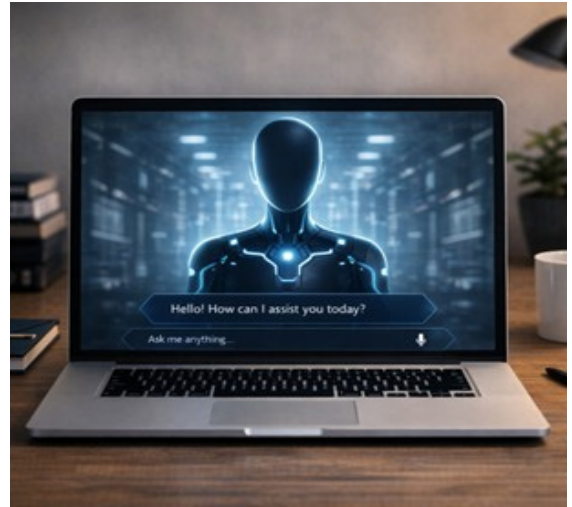
An outline of our Salesforce Agentforce solution including our resources, methodology, capabilities, and client benefits.

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Introduction

Welcome to our "Agentforce POC to Production" report. This report encapsulates how we help our clients determine if their business is Salesforce Agentforce ready and what agentic solutions can add value to their business. Our focus lies on understanding system platforms, applications, users, business processes, and KPIs/budget. We then build use cases and a solution model for deploying Agentforce agents - scalable and sustainable for long-term usage.



Purpose of Building Agentforce

Until now, AI models have performed simple tasks - generating text, summarizing documents, or sending emails - essentially acting on user prompts. Agentforce agents change that by taking "action" on their own - analyzing complex datasets, identifying patterns, managing business processes, and then taking action as an authorized digital employee to achieve a particular outcome.

Report Scope

- Agentforce readiness starts with data and metadata harmonization, standardization, and usability for long-term, ongoing data enrichment.
- Prioritize security, governance, compliance, privacy, and audit risk.
- Define agents - client use cases with context optimization that increase user productivity and amplify customer experience.
- Deploy agents - strict guardrails - reason and act - avoiding hidden bias and skew.
- Test agents - actions and outcomes with natural language processing (NLP).
- Train and empower users to manage agents.
- Plan future agents and track via predictive analytics.

"...while organizations turn to technology for efficiency, most desk workers still lack clear guidance to use AI effectively: 83% don't have a clear idea of how to integrate AI into their workflows, and 45% say their company has no published AI guidelines."

"AI Agents Are the Catalyst for a Limitless Workforce."

Current Trends

80%

"AI projects fail due to poor data, inadequate security, and inaccurate outputs. - Gartner

52%

"52% of customers don't believe AI is safe and secure." - Mitre-Harris Poll Survey on AI Trends, September 2023

5%

"US companies have poured between \$35 billion and \$40 billion into GenAI projects, yet only about 5% of those efforts have yielded substantive revenue growth." – MIT's NANDA Initiative

80%

"By 2026, 80% of customer service and support organizations will be applying GenAI to improve agent productivity and CX." - Gartner

62%

"Despite plans for widespread adoption, CTO confidence in AI is slipping. Just 62% of business leaders surveyed say they are very confident in their company's AI deployment plans." – CIO Dive

25%

"Productivity boost for businesses that adopt AI." - Gartner

70%

"70% of AI Projects remain stuck at the POC stage when the data foundations are not strong enough" – DQE, Unlock AI Success With Clean Salesforce Data, 2026

Solution Description

1

Org Readiness - Source of Truth

A Salesforce org scan assesses the data/metadata hygiene, technical debt, legacy customizations, apps, managed packages, and overall adoption and performance. Goal: establish a single source of truth for data grounding.

2

Processes: Latest OOB Tools

Client business processes and user workflows are documented and reviewed to ensure relevance as well as upgraded and/or replaced utilizing the latest Salesforce OOB toolset (Flow, API, Lightning Web Components).

3

Security, Governance, Compliance

Salesforce org current security models include OWDs, sharing rules, profiles, roles, permission sets, objects, fields, etc. Ensure adherence to client and industry privacy, compliance, data masking and zero retention requirements.

4

Agent Use Case Types

Agent use cases are grouped as either deterministic (Fixed Scope, Light Context, Input-output Tasks) or probabilistic (Pattern Recognition, Statistical and Mathematical Models). Predictive outcomes are modeled to determine overall benefit and success.

Summary

Prerequisite activities and knowledge transfer are critical to building our Salesforce Agentforce solutions including org assessment, security and governance, business process alignment, and use case definition and validation.



Methodology

1

ACL Digital Project Team

- Project Manager
- Salesforce Solution and Technical Architects
- Salesforce Business Analyst
- Salesforce Developers
- Salesforce Testers

3

Salesforce Org Analysis

- Review client artifacts, documentation, and architectural diagrams
- Perform Salesforce org scan
- Understand active platform integrations
- Audit security, governance, and compliance requirements

2

User Workshops

Conduct user workshops to understand external and internal business process automations (Workflow Rules, Process Builders, Flows, etc.)

4

Define Agent Use Cases

- Collaborate with client stakeholders to determine agent use cases
- Enable Agentforce (Sandbox), configure, and build Agents
- Deploy and test agents - verify results

Summary

Our team of certified Salesforce professionals work to understand and analyze our client Salesforce orgs and business processes - then work side-by-side with their internal teams to define and build the right Agent solutions. Finally, thorough testing and outcome documentation is generated for accuracy, verification, and completeness.



Agentforce Top 10 Agents

Autonomous Customer Service	Automates the handling of routine service inquiries, uses real-time data to resolve issues without human intervention, escalates complex cases to human agents with full context.
Sales Development and Lead Qualification	Proactively engages prospects, qualifies leads based on predefined criteria, and schedules meetings.
Personalized Marketing Campaigns	Analyzes customer data, automates personalized multi-channel communication, and audience segmentation.
HR Onboarding and Employee Support	Streamlines employee lifecycles, manages onboarding workflows, answers HR policy questions, and assists with internal administrative tasks.
Field Service Optimization and Dispatch	Manages service appointments, predicts maintenance needs, and coordinates field personnel dispatch based on real-time data and technician availability.
Revenue Intelligence and Deal Coaching	Monitors active deals to provide actionable insights to sales teams, suggests "next best actions" and identifies potential bottlenecks or risks in the sales cycle.
E-commerce Personalization and Shopping Assistance	Provides 24/7 personalized product recommendations, manages order status inquiries, and assists customers through the digital shopping experience.
Legal and Compliance Document Processing	Automates the extraction of key information from complex documents, ensures adherence to regulatory standards.
Customer Success and Churn Prevention	Identifies at-risk accounts by monitoring usage patterns and engagement data, triggers proactive retention workflows.
Internal IT Helpdesk Automation	Handles routine IT service requests, such as password resets, software access provisioning, and common troubleshooting tasks.



Conclusion

Thank you for your interest in our Salesforce Agentforce POC to Production solution. Our strict methodology allows our clients to understand and implement the highest value AI agents that best align with their business and Salesforce initiatives.

Building Agentforce agents requires a deep operational, technical, and process analysis in order to deliver higher user productivity and a better overall customer experience. Our dedicated Salesforce staff are eager to help our clients realize the potential and many benefits of Salesforce Agentforce.

If you would like to speak with one of our Salesforce consultants, please contact us.



Agentforce POC to Production

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