

Agentforce Use Cases

Solutions Delivered for Clients — Real-world AI-powered capabilities built on Salesforce Agentforce to transform sales productivity and CRM intelligence.



Use Case: Advanced Account Summary

What We Built

An Agentforce-powered capability that generates a structured **Advanced Account Summary** by aggregating data from multiple related Salesforce objects and restructuring it using prompt templates.

Key Capabilities

- Aggregates data from **multiple associated Salesforce objects**
- Insights: account info, ownership, prospecting, PR/compliance, opportunities, product recommendations
- Uses **prompt templates** to restructure complex data into readable summaries
- Delivers concise insights directly within the Agent interaction

📄 **Example Output:** ABC Enterprises — 103 employees, Other industry fit, Closed Lost opportunity, and AI-driven product recommendations for Benefits and payroll solutions.



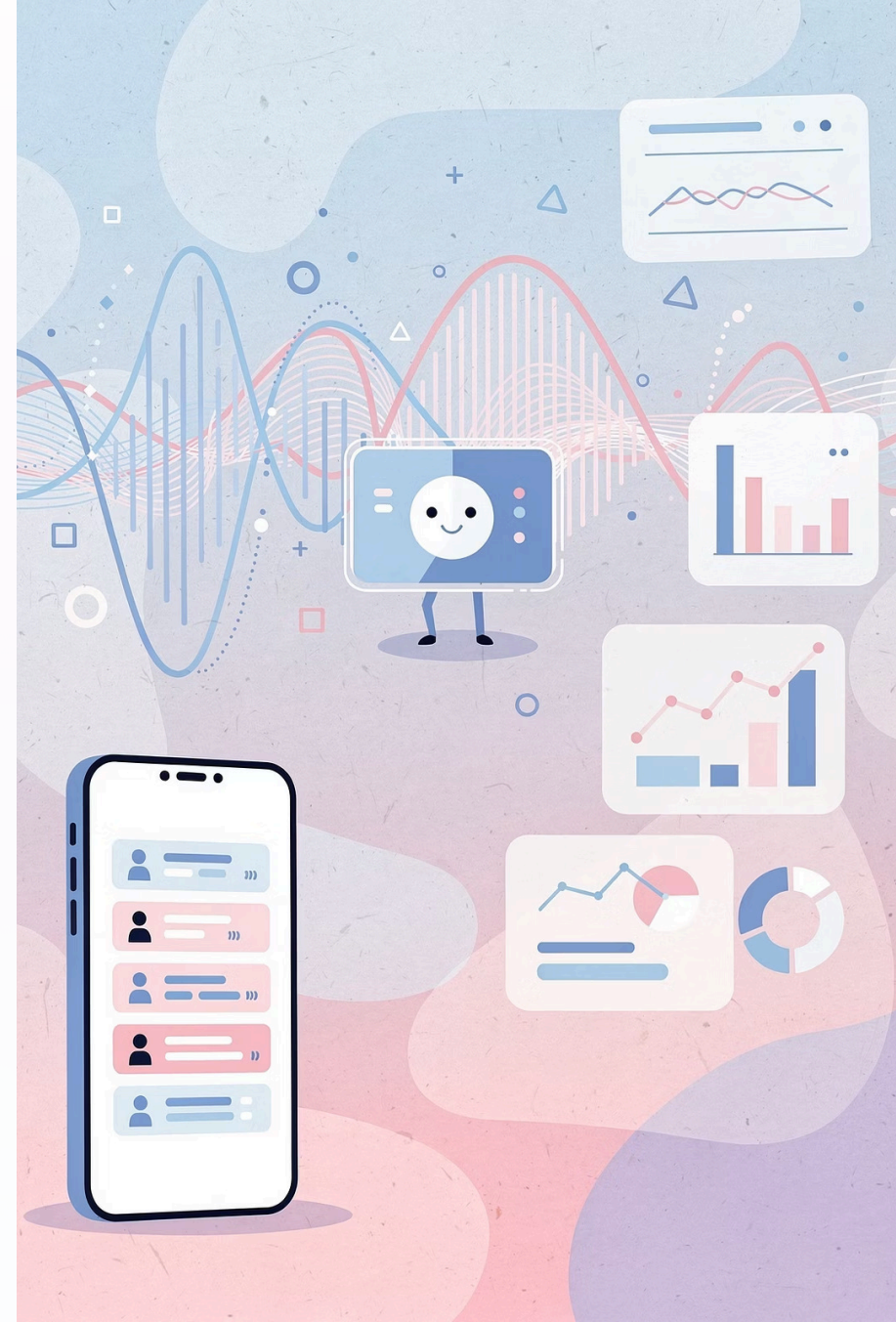
Use Case: Call Insights

What We Built

An Agentforce capability that retrieves call details from external systems (e.g., CTIs) and restructures them into structured insights for sales users.

Key Capabilities

- Retrieves call data from **external sources**
- Extracts: customer overview, business goals, pain points, key stakeholders, decision criteria, competitive context, pricing considerations
- Presents insights in a **structured format** for quick understanding
- Enables better preparation for follow-up conversations



Use Case: Competitor Insights

What We Built

An Agentforce capability that retrieves competitor data from external systems and provides contextual insights based on the user's query.

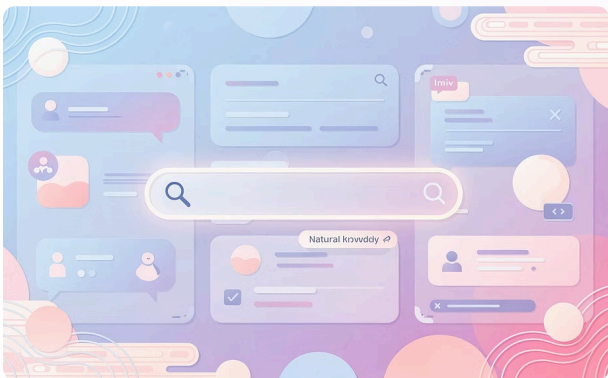
Key Capabilities

- Retrieves competitor intelligence from **external systems**
- Provides: positioning, strengths/weaknesses, competitive landscape, strategic deal insights
- Enables sales teams to respond more effectively in competitive situations

Example: Winning Against XYZ Corp

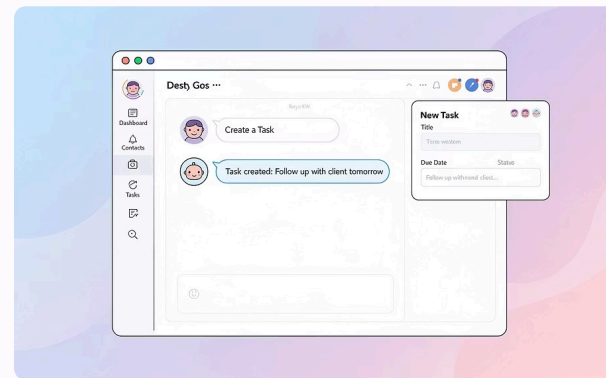
- **Positioning:** Lead with top Workforce Management ranking and single-database platforms
- **Expose weaknesses:** Limited scalability, inconsistent support, gated features
- **Differentiate on value:** Broader service set, stronger analytics, better pricing
- **Leverage advocacy:** Boomerang testimonials, case studies, switcher sell sheets





Use Case: Knowledge Article Search

Integrated Agentforce with **Salesforce Data Cloud** to enable intelligent knowledge article discovery via natural language queries. Returns direct article links for faster, accurate product and service information access.



Use Case: Task / Note Creation

Users create tasks or notes on **any Salesforce record** through natural language. The Agent captures subject, description, due date, priority, and status — reducing manual navigation and ensuring follow-ups are recorded instantly.

SALESEDGE AGENTFORCE

SalesEdge: Real Estate CRM

Project: Palmcrest Towers — A purpose-built Agentforce implementation for real estate lead and opportunity management, powered by Salesforce Agentforce.

Lead Management

Manage, analyze, and act on your assigned leads using SalesEdge conversational intelligence. Project: **Palmcrest Towers**.

1**UC 01 — Lead Count**

Total leads assigned this month (e.g., **11 leads**, Mar 1–16, 2026)

2**UC 02 — Score Breakdown**

Leads by rating: **Hot: 3, Warm: 3, Cold: 5**

3**UC 03 — Hot Lead Details**

Umang Kumar (89), Raghav Kumar (89), Taran Kumar (83)

4**UC 04 — Call Summary**

Summarizes all logged call activities for a specific lead with sentiment and timeline

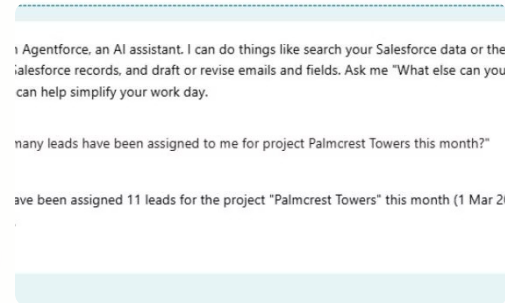
5**UC 05 — Top Conversions**

Ranks leads by AI-calculated conversion probability (e.g., Umang Kumar, Tania Roy — **89%**)

6**UC 06 — Past Enquiries**

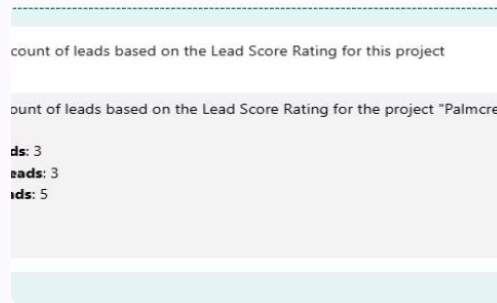
Full enquiry history across projects (e.g., Palmcrest Towers + Infinity Towers for Gitesh Sa)

Lead Use Cases



UC 01 — Lead Count

11 leads assigned for Palmcrest Towers, Mar 1–16, 2026



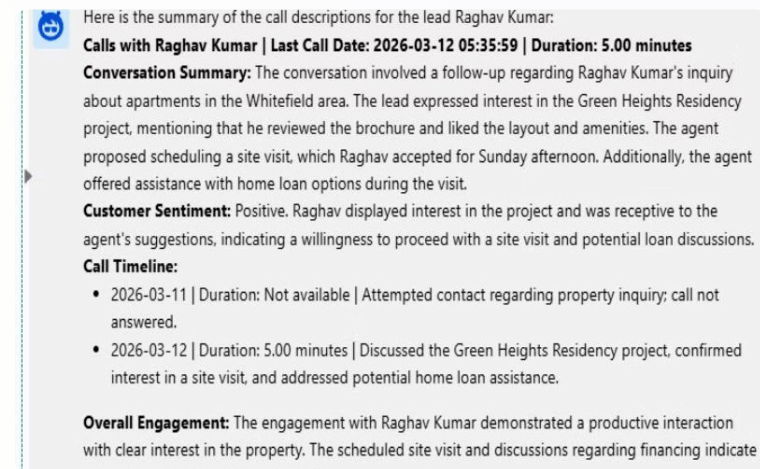
UC 02 — Score Breakdown

Hot: 3 · Warm: 3 · Cold: 5



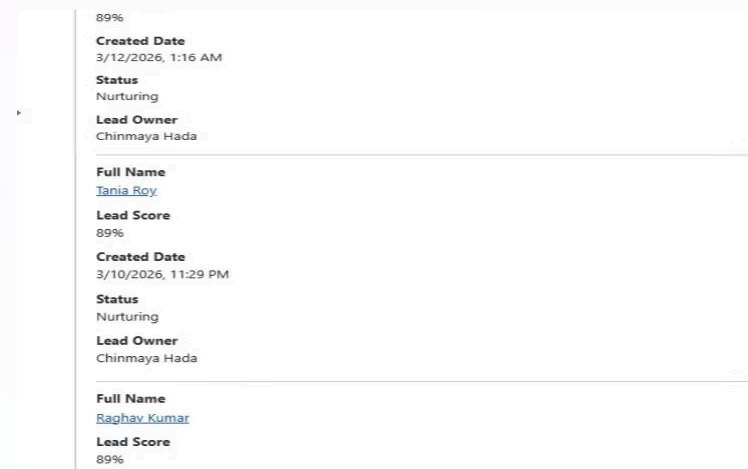
UC 03 — Hot Lead Details

Umang Kumar, Raghav Kumar, Taran Kumar — scores 83–89



UC 04 — Call Summary

Raghav Kumar: positive sentiment, site visit scheduled, home loan discussed



UC 05 — Top Conversion Leads

Umang Kumar, Tania Roy, Raghav Kumar — all at **89%**, Nurturing status

Opportunity Management

Track, analyze, and manage your deals with intelligent SalesEdge conversational support. Project: **Palmcrest Towers**.

UC 08–09

Opportunity count this month (**13 total**) and stage-wise breakdown:
Booking 3, Negotiation 4, Prospecting 3, Closed Lost 3

UC 10–11

Booking stage details (Anil Chowdhury, Sai Karthik, Karthik Kumar) and
specific opportunity deep-dive with financials (e.g., **₹4,011,370**)

UC 12–13

Follow-up task creation via chat and high closure probability deals (>65%)
— 7 deals identified, up to **90% probability**

UC 14–16

Highest deal: **₹6,244,575** · Lowest: **₹1,812,000** · 16 completed site visits ·
Open visit tracking

UC 17–18

Quotation summary across active deals and close lost analysis — 4 lost
deals with reasons and total lost revenue

UC 19

Overall performance: 74 dial calls, 83 min talk time, 17 lead conversions, 7
bookings, 4 closures

Opportunity Use Cases



UC 08 — Opportunity Count

13 opportunities assigned this month across Booking, Negotiation, Prospecting stages



UC 09 — Stage Breakdown

Booking: 3 · Negotiation/Review: 4 · Prospecting: 3 · Closed Lost: 3 · Welcome Call: 1



UC 13 — High Closure Deals

7 deals at $\geq 70\%$ probability — top deals at **90%** in Booking stage



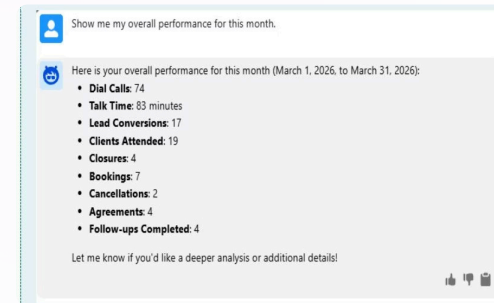
UC 14 — Deal Amounts

Highest: **₹6,244,575** (Hofima Houli) · Lowest: **₹1,812,000** (Yosina Gortia)



UC 18 — Close Lost Deals

4 lost deals — reasons: unit unavailable, location preference, unresponsive client, financial postponement



UC 19 — Performance Summary

74 calls · 83 min talk time · 17 conversions · 7 bookings · 4 closures

Key Capabilities Delivered by SalesEdge



Natural Language Queries

Sales reps interact using plain conversational prompts — no complex filters, manual reports, or CRM navigation required.



Intelligent Task Automation

Follow-up tasks created directly in the Agent chat, reducing manual data entry and improving productivity.



Comprehensive Summaries

From individual call logs to full monthly performance dashboards — complex CRM data consolidated into clear insights.



Real-Time CRM Data Access

All responses are powered by live Salesforce data, ensuring accuracy and relevance at every interaction moment.



Lead & Deal Prioritization

AI-powered scoring and probability rankings help reps focus on highest-value leads and near-closing opportunities.



Multi-Object Data Aggregation

Aggregates data across Leads, Opportunities, Activities, Site Visits, and Quotations into unified, contextual responses.