

salesforce

5 Ways to Scale Your Sales Team with Agents

Build a limitless sales team with the power of autonomous AI.





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Foreword

Closing a deal will always come down to understanding needs, building genuine relationships, and creating “aha!” moments of value. The winners are the ones who get there faster.

Sales agents can help. They’re autonomous AI workers that can take on tasks in the background to refocus your attention on connecting with customers. These agents are doing what AI was always meant to do: They take action on your behalf, operate using natural language, and function with minimal human intervention.

But not all agents are created equal. A great agent needs great data, and [Agentforce](#) – built on the trusted Salesforce Platform – gives agents access to secure, real-time data from every tool you use across departments, from sales to service to marketing.

The result is that you can lean on our agents to handle critical sales tasks and solve the biggest problem in sales: There simply aren’t enough hours in the day for both the important work and the repetitive, time-consuming tasks. In this playbook, we show you how agents make it all happen, with five key use cases they’re ready for today, from nurturing prospects to coaching reps and drafting quotes.

It’s poetic when you think about it: The future of selling is about spending more time actually selling.



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Learn how humans with agents succeed together.

One of the great goals of AI is autonomy: a friendly tool that can do work on your behalf. We kicked off the journey with predictive AI that could make recommendations, like which leads to pursue. But humans still had to take action. Then we built generative AI to create content like emails and pitches. But humans still had to provide instructions every time.

Next came sales agents, a type of AI that can take action on our behalf. For example, sales agents can answer customer questions without human intervention. The responses are trusted, accurate and personalized because they're grounded in company and customer data.

Yup – that's autonomy, and the result is scale. Use digital labor to free up your human workforce to focus on the important stuff, from building relationships to closing deals.

The makings of a great sales agent.

Before you can trust a sales agent to be autonomous, you need to be utterly confident in its accuracy and security. Here are key elements to look for:

1 Secure, complete data.

Data is the fuel for sales agents. But if your data is incomplete and indecipherable, sales agents will produce inaccurate results. Agentforce avoids this pitfall using [Data Cloud](#), which securely connects your CRM and third-party data and gives sales agents complete customer views. Data Cloud then uses metadata to help the agent retrieve relevant information in the moment. This grounds the agent in context and makes it more effective – for example, by personalizing email outreach to each prospect's unique needs and circumstances.

2 Trusted reasoning.

So your sales agent has the data. But if it can't make sense of the data, it will be prone to error and require human intervention to keep it on track. Agentforce set out to make agents that are so accurate, you can go off-leash and trust them to act on your behalf. How? We built the [Atlas Reasoning Engine](#) to guide agents through an effective loop of reasoning, acting, and observing until your goal is achieved. This engine is built with transparency: You can ask the agent for natural-language explanations of its decisions.

3 CRM integration.

A sales agent's purpose is to boost productivity across the sales team. To achieve that goal, look for a sales agent that's connected to your CRM and sales automation tools, so you can work with agents right in the flow of your work. This integration also makes it possible for sales agents to take on complex sets of actions end-to-end. For example, Agentforce can cross-reference a prospect with their company policies in your CRM, and draft a quote that uses their preferred payment terms and liability clause.



Ready to get started with sales agents? Keep reading to discover the five most important use cases to increase the capacity of your team and help your reps close more deals, faster.



Personalize your outreach to leads.

Problem:

“I wish I could spend more time on cold outreach,” said no sales rep ever. The truth is, there’s not enough time in the day to contact every inbound lead. Reps already spend **17% of their week** (almost one full day) on prospect research and outreach, and with administrative work, sales calls, planning, and enablement in the mix, there’s just not time to tackle them all. That’s why many inbound leads are left out in the cold, never to be contacted.

How sales agents help:

Focus your rep’s attention on the most important leads, while an agent reaches out to the rest. The success of this outreach will come down to your data. A sales agent needs access to the lead and deal data in your CRM. Then it needs to unify that information with third party engagement data – like browsing data and downloads – to craft gripping messages for your prospects.



By automating lead nurturing, we reduce time spent on manual outreach and increase our ability to connect with customers.

Mikael Back

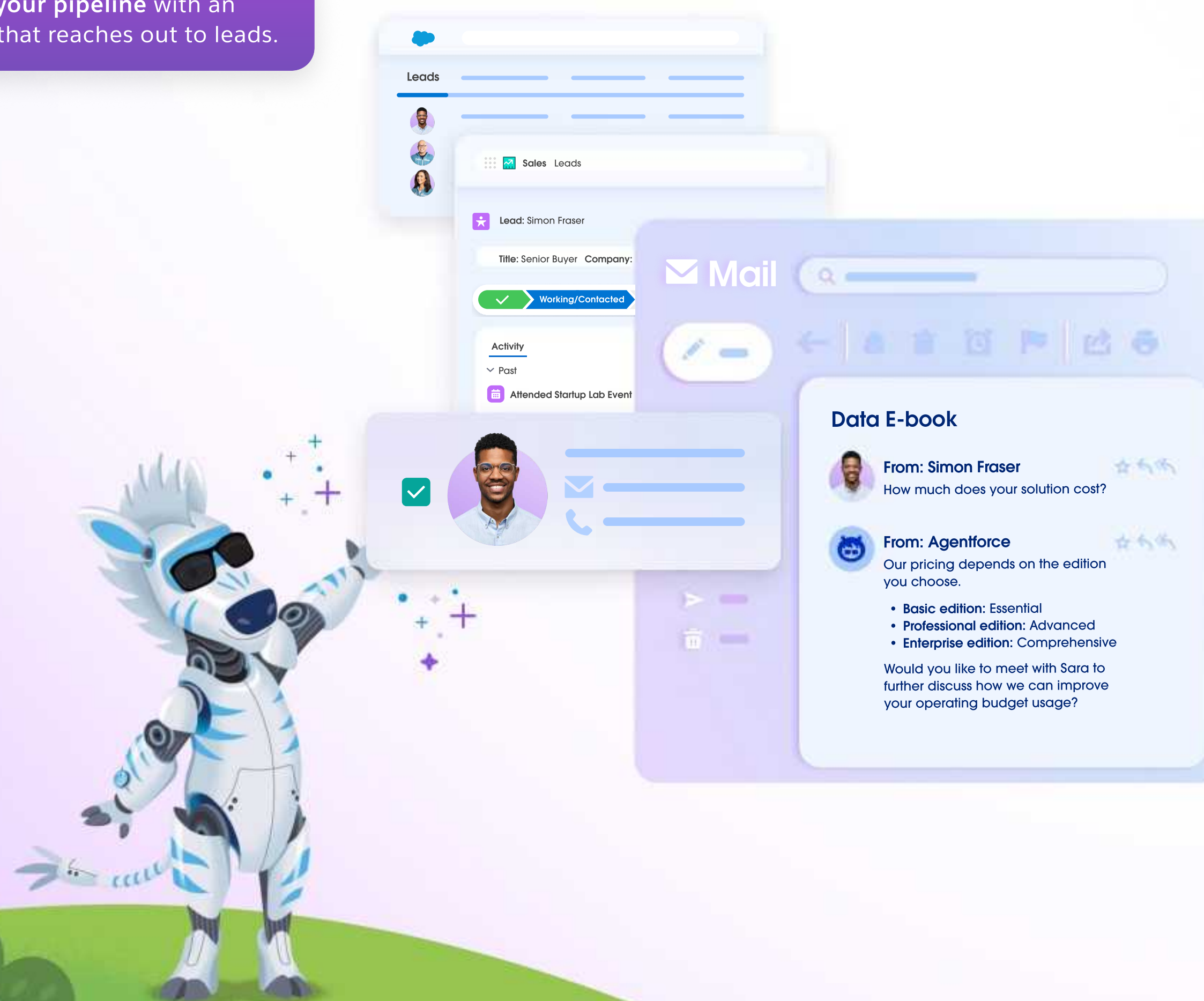
Lead, Sales Development and Salesforce Platform Owner, VTT

Agentforce Example

Let’s say you’re a sales leader at a software company with a backlog of leads from past webinar attendees. In a few clicks, you power up Agentforce to help you nurture those leads, working 24/7 to send emails at scale.

To tailor its messages, Agentforce takes in data from the topic of the webinar the lead watched, the history of any interactions stored in your CRM, and third party data about their company profile. The agent also draws on documents you upload that share your selling best practices, such as sales enablement materials. And uses sophisticated reasoning to personalize emails to individual prospects, according to their profiles and interests.

Grow your pipeline with an agent that reaches out to leads.



Nurture prospects and hand them off to sales.

Problem:

Even if you manage to reach out to every inbound lead, there's still the hurdle of responding to them in a timely manner. Leads reach back out with questions about products and requests to schedule a meeting, and responding quickly can mean the difference between grabbing their attention or letting them slip between your fingers.

How sales agents help:

Sales agents can help with the time-consuming task of nurturing prospects after initial outreach – but only if they can really understand your prospect, product, and sales process. Other companies have agents that are more like chatbots, using rudimentary if-then rules to answer generic questions. A true agent, by contrast, can get to know your leads, provide detailed answers to their questions, and schedule meetings with your reps when they're ready to learn more.



We use agents to work our lowest-ranked inbound leads — by reaching out, answering questions, and booking meetings — until they're truly ready for sales.

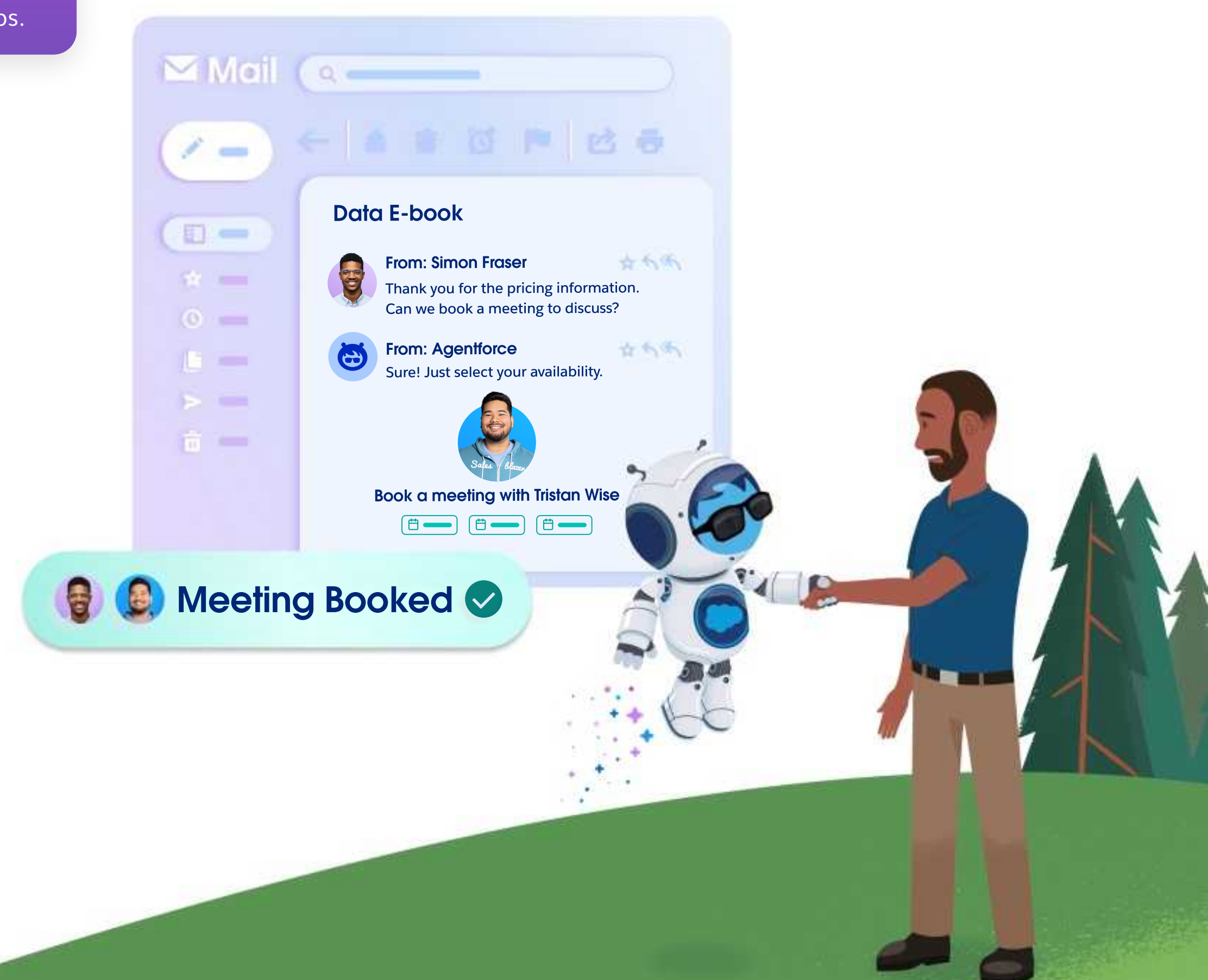
Leah Muller
Senior Vice President, Sales Development, Salesforce

Agentforce Example

Back at your software company (see use case 1), prospect responses are pouring in, thanks to the personalized outreach of Agentforce. Next, Agentforce automatically nurtures these prospects by answering their questions, from the basics about pricing to more complex inquiries.

Agentforce is able to provide accurate responses to every query because it's integrated with your CRM and a raft of enablement materials, including product FAQs and catalogs. After initial questions are answered, the sales agent sends leads a link to schedule a meeting with a rep for a more in-depth discussion about your software. Even better: All of this activity is delivered to the rep for additional context before the sales call. This nurturing makes the rep more productive by ensuring they spend less time on prospecting and more time meeting with qualified leads.

Advance your pipeline with an agent that warms up leads and schedules meetings with reps.



Coach reps to improve their sales pitches.

Problem:

Delivering a pitch that resonates with customers is no easy task. Sellers have one chance to make a great impression that generates momentum, so practice is critical. But sales managers simply don't have time to get up to speed on individual deals and continually help reps refine their pitches.

How sales agents help:

Give every rep dedicated coaching to help them level up their skills and refine their sales pitches. A coaching agent can analyze sales pitches and provide immediate feedback on what went well and what needs improvement. But this feedback will fall flat unless the agent is grounded in context, from the specifics of your value proposition to the pain points of your target customer.

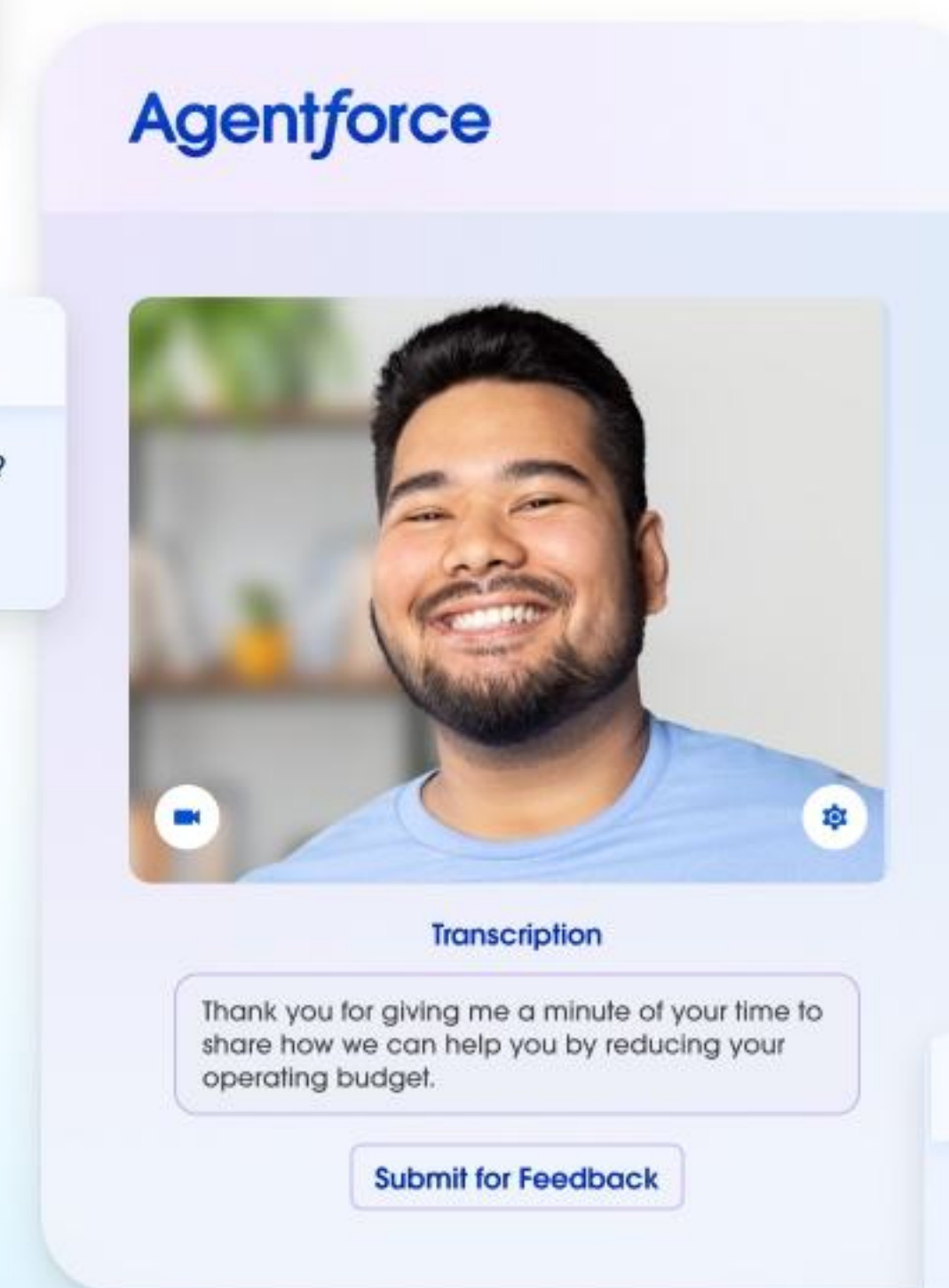


Agentforce Example

Imagine you're a sales leader for a healthcare company, launching a new device that's up against a competitor's. One of your reps has an important meeting coming up to pitch this new product. They launch Agentforce and click "Start recording" to rehearse their pitch.

In a few seconds, Agentforce provides detailed feedback that the rep can act on right away. The feedback is accurate and personalized because Agentforce draws on its extensive knowledge base – from the prospect's account history to how your features and pricing stack up against your competitors. Here, the agent advises the rep to spend more time sharing results from current customers and stories about how the product has improved patients' lives. The rep takes these game-changing insights to the real-life pitch and aces the sales call.

Make reps more effective with an agent that analyzes pitches and gives tips to get better.



Role-play any conversation in the sales process.

Problem:

Only about **1 in 4 sales reps say** they receive one-on-one coaching every week. The truth is that sales managers simply don't have the time to help reps prepare for all their important sales conversations, like reviewing proposals or navigating pricing – the kinds of conversations that could make or break deals.

How sales agents help:

Set up a coaching agent that can help reps role-play difficult conversations at different stages in the sales process, such as objection handling and negotiation, so reps can communicate value and close fast. To perform this role-play effectively, here's what a sales agent will need: secure access to customer and company data, real-time reasoning skills to provide realistic responses, and an understanding of your best practices (such as discounting guidance).



We provide our clinicians with a dedicated coach. This helps them build their skills to effectively engage patients with empathy, motivation, and the benefits of Precina's patient-first protocols.

Dr. John Oberg
CEO, Precina Health

Agentforce Example

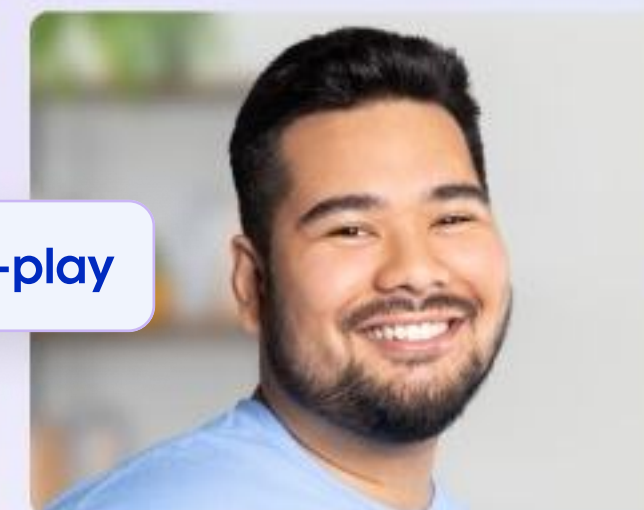
Remember the rep who used Agentforce to perfect their pitch? It worked. The deal has moved forward to the negotiation stage. Now, the rep needs to prepare for what they expect to be a tough conversation. They turn to the coaching agent, opening it up from the opportunity page. They click “Start role-play,” and launch an interactive role-play, with the agent playing the role of the prospect.

During the role-play, the agent throws the rep a curveball and says that they're going with a competitor unless the rep can commit to a discount. The rep hesitates, not sure what to do. After the role-play is complete, the agent provides helpful feedback: Come to the call prepared with a preapproved discount and guidance on how to reinforce your value to beat the competitor. The rep is grateful they learned how to handle this curveball in rehearsal. Now they're for ready game day.

Increase win rates with an agent that helps reps rehearse important sales calls before they happen.

 **Start role-play**

Agentforce



Your Response

I noticed you brought up some pricing concerns in a previous email.
Let's talk about that.



Sales Coach Response

Yes, thank you for remembering that.
I was curious to learn more about a slight discount on the premium package.

Restart



 **Role-play Feedback**

Come prepared with a preapproved discount. Spend more time reinforcing your value against the competitor.

Create accurate quotes faster.

Problem:

The quoting stage is a critical moment when the customer has reached peak interest and is ready for a proposal. It's also the moment when the sales rep gets trapped in tedious processes, whether it's digging through the product catalog to figure out pricing guidelines or waiting for approvals from finance and legal.

How sales agents help:

A sales agent can draft quotes for reps in a fraction of the time. But before the agent can draft quotes that meet both company policies and customer preferences, it will need access to trusted CRM data so it can analyze price guardrails, maneuver through rules for bundling and product dependencies, and analyze opportunity records and recent sales conversations.

 Agentforce Example

Let's say you lead a sales team for a retailer with a complex product bundle. After nailing the negotiation call thanks to Agentforce, your rep is on the brink of inking a deal. They ask Agentforce to create a quote right from the opportunity page.

Agentforce is able to draft a quote that's ready for prime-time and meets company guidelines, which means it won't need to go through a manual approval. How? It pulls in all the right data, including past interactions, configuration rules from the product catalog, and account-level data such as payment terms for products that your prospect's company already owns. In moments, the quote is drafted – something that could have taken the rep hours to do before.

Get more dollars on the books with an agent that quickly drafts quotes.

What's Included

Base Model	One-Time
Service Add-on	Consumption
Warranty	Subscription

Calculation

Price Per Device	USD 18,000
Number of Devices	50
Discount	5%

Agentforce

Please put together two proposals for me. 1: 1-year warranty at 5% discount. 2: 3-year warranty with 10% discount.

I've drafted those quotes for your review here.

Review Quotes

These look great! Thank you.

No problem. Please note that these quotes expire in 7 days so be sure to remind the customer of the timeline.

Describe your task or ask your question





Build an agent for any industry.

Agentforce for Sales works across industries, giving you the tools to quickly configure any agent to meet your specific needs. Here are just some examples:

Automotive

Ecommerce: Personalize outreach and sales recommendations based on customer web visits and interactions.

Financial Services

Business development: Analyze accounts, goals, and relationships to draft personalized advice for asset managers to grow their book of business.

Manufacturing

Territory management: Help sales managers balance opportunities and demand forecasts to prioritize their day and serve customers faster.

Consumer Goods

Prospecting: Address customer inquiries about inventory levels, availability, and product details.

Healthcare and Life Sciences

Coaching: Coach clinicians to provide personalized engagement with patients, ensuring both empathy and compliance.

Technology

Subscription selling: Improve customer lifetime value by identifying upsell opportunities for subscription software customers.

More Agentforce innovation is coming.

Agentforce innovations are underway to power every stage of the sales process, helping you:

Hire faster

Increase win rates

Collect cash faster

Onboard faster

Enable partners

Increase revenue per customer

Visit the Agentforce for Sales website to keep up with the latest announcements.





Learn more about how Agentforce is changing sales for good.



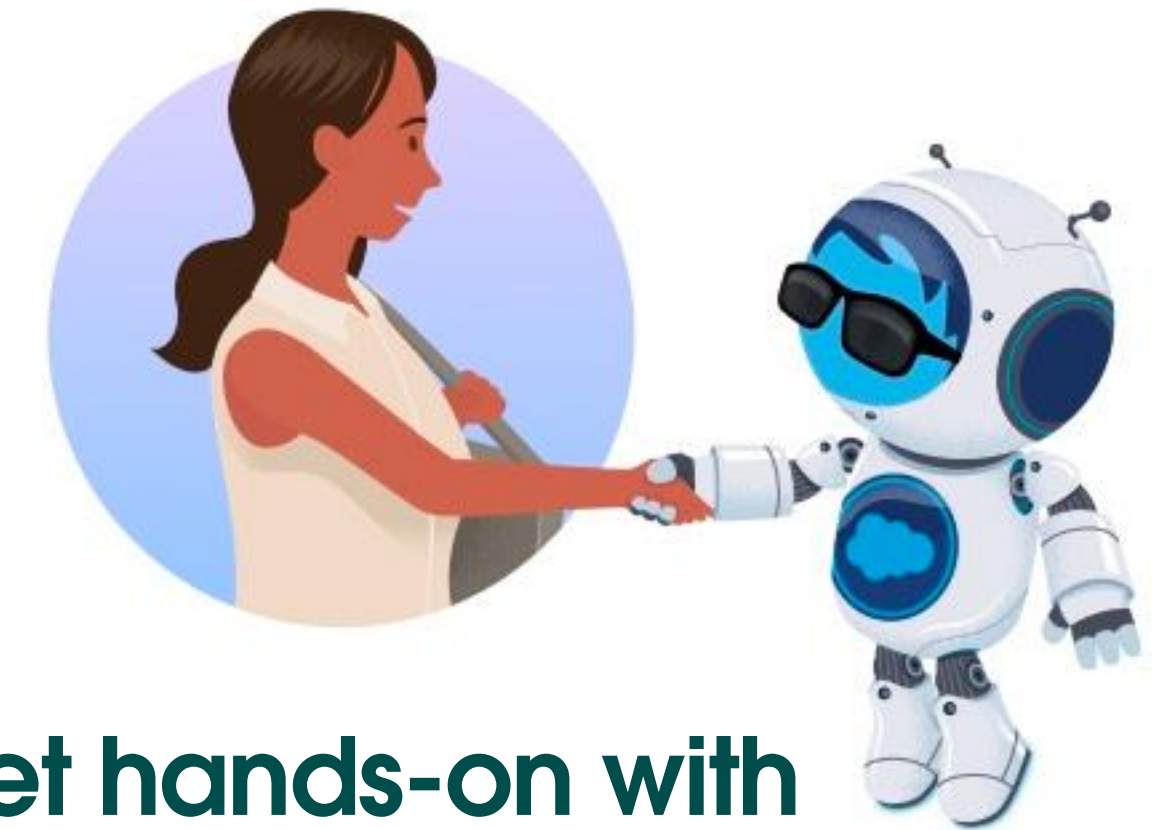
Build a limitless sales team.

Discover Agentforce for Sales and build a digital workforce, increasing your team's capacity while lowering costs.

[Learn more](#)

See Agentforce in action.

Watch live demos of Agentforce for Sales and see how easy it is to scale your prospecting and nail your sales calls.

[Watch demo](#)

Get hands-on with sales agents.

Join a live workshop on Agentforce for Sales. You'll learn how to deploy sales agents and become more productive on Day 1.

[See events](#)



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