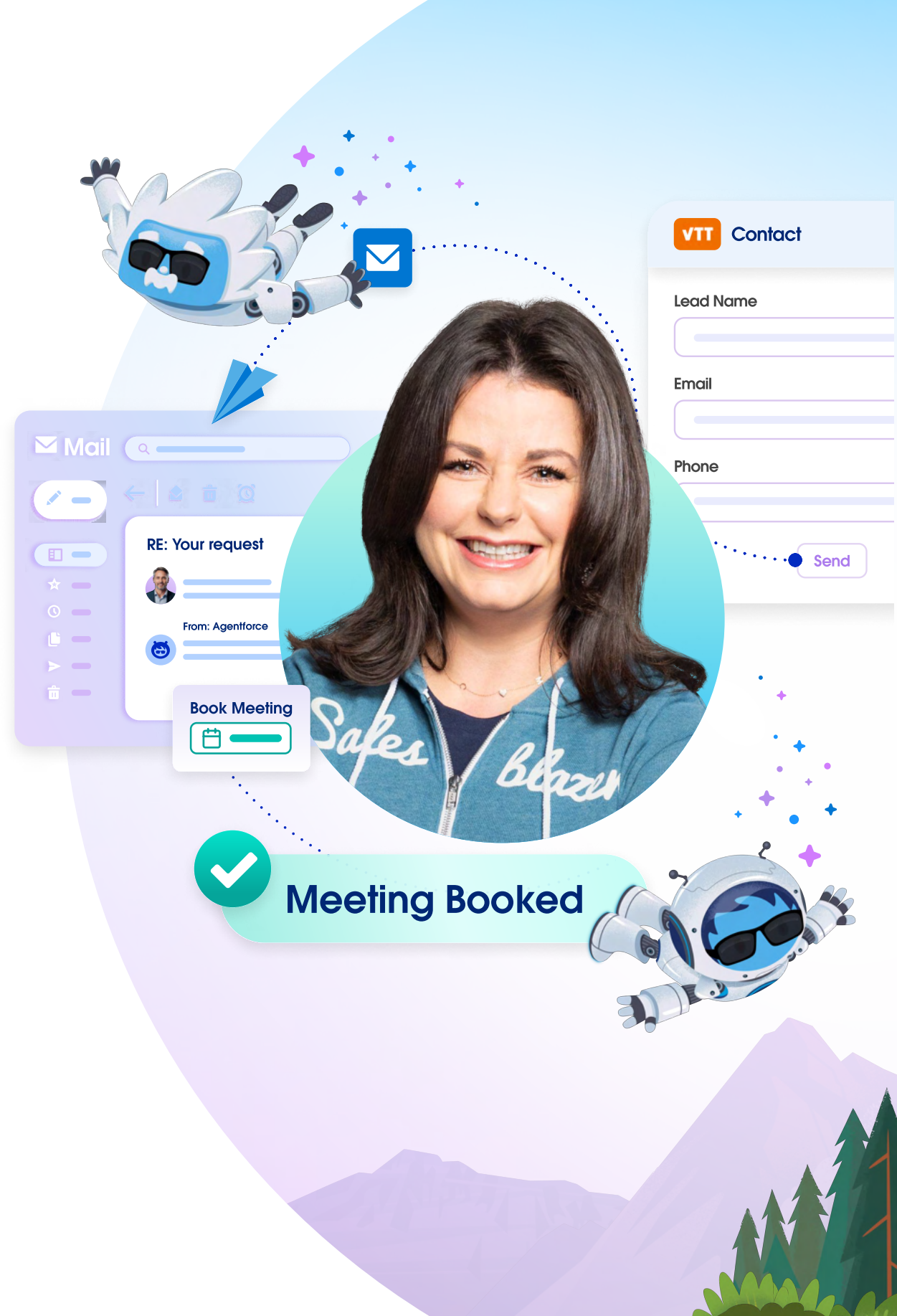


salesforce

How Leading Companies Use Agentforce for Sales

See how AI sales agents are helping teams nurture leads, coach, and more.



The newest member of your sales team is Agentforce. These companies are proof that it works.

In our [State of Sales](#) report, sellers said they spend upwards of 70% of their week on non-selling tasks – things like compiling data, chasing down leads, and prepping for sales calls. That's a lot of time not spent with customers.

You've likely used AI to help handle some of these tasks. But up until recently, AI required a decent amount of guidance. Maybe you had AI draft an email but only after crafting a prompt, then checking the output for errors. AI saved time, but still required a lot of human input.

Agentforce is different. It's a customizable suite of autonomous and assistive AI agents that perform tasks end-to-end, or with minimal human input. With secure access to customer and company data and a revolutionary reasoning engine, it makes nuanced decisions and engages with customers without the hand-holding of previous generations of AI.

The best part: Agentforce is always on and scales to meet the needs of any company, opening the door to limitless digital labor.

Agentforce is designed to supplement sales teams by taking on the non-selling tasks that bog down your reps, freeing them up to focus on the things sellers do best: building relationships with customers.

In the following pages, you'll read about Agentforce customers in healthcare, consulting, and technology who are already seeing game-changing boosts in productivity. And while Agentforce has a plethora of skills ready out of the box, it can be customized for any business and industry. In other words, this is only the beginning of what's possible.



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Research institution VTT engages thousands of new leads with automated nurturing.

VTT Technical Research Centre of Finland is a government-owned research institution. Their focus is on solving global challenges using science and technology. Primary research areas include carbon-neutral energy systems, sustainable products, and digital technology.

Challenge: VTT brings in an estimated 4,000 leads annually from social media, web forms, and events. These leads are either individuals or corporate/organizational entities that need research support and services.

Each of these leads requires careful vetting before being moved down the funnel for an in-depth conversation with a research lead. With all of the legwork involved, VTT estimates that each of their SDRs spends between 600 to 1,000 hours a year on lead qualification, connecting with fewer than half.



“With Agentforce, VTT empowers our researchers and other experts to focus on what truly matters: creating sustainable innovations”

Mikael Back
Lead, Sales Development & Salesforce Platform Owner, VTT

VTT

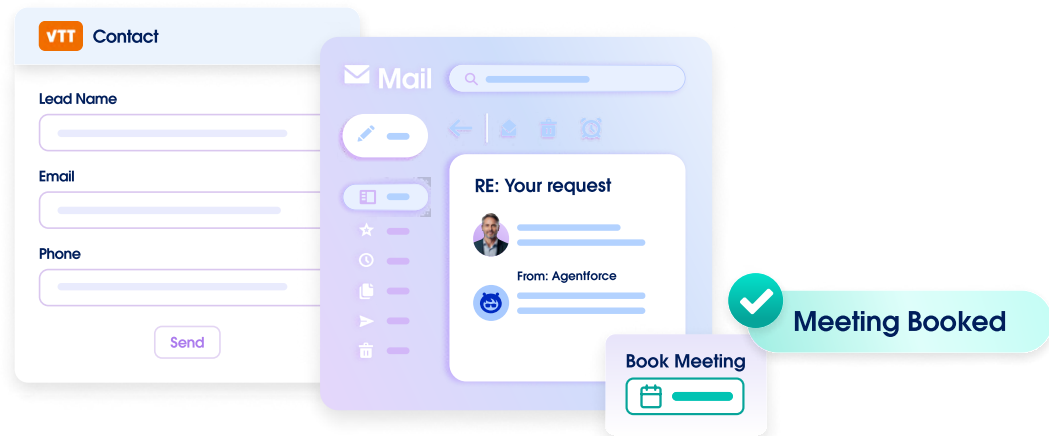


Out of the box, Agentforce has helped VTT connect with more leads instantly — and it was painless to onboard.

To start, VTT created and set up a sales agent in Agent Builder – a low-code tool on the Salesforce platform purpose-built for configuring agents. First, they selected the prebuilt prospecting skill to help with outreach and lead nurture. Then, they provided plain-language instructions on how to handle incoming leads, like when to initiate contact. Finally, they uploaded information about VTT, like FAQ and research application requirements, to provide helpful and accurate responses to questions. If details change, VTT can update the agent with new material to ensure continued accuracy.

Once activated, the sales agent instantly began connecting with leads that came in through VTT's landing pages. Intake forms generally include fields for the prospect's name, company, job title, and research request details, giving the agent information it can use to personalize initial email outreach. If a lead responds with a question or a request for more information, the agent simply uses information uploaded during setup to tailor its responses. And because Agentforce works 24/7, it's able to tackle the leads when the human SDRs aren't available. **The result: More incoming leads are now being contacted within hours of being received. Within a few months, VTT expects to connect with 100% of inbound leads.**

This has been a game-changer. Now, VTT's salespeople and researchers have time to focus on crucial conversations further down the pipeline when leads are well-vetted. It also means no valuable research opportunities fall through the cracks.



Healthcare company Precina use agents to grow their patient base and train clinicians.

Precina is a healthcare company dedicated to helping people manage their Type 2 diabetes. Their clinicians create personalized treatment plans for patients, many of whom are low-income or in rural areas, to improve the quality and length of life by keeping blood sugar levels within healthy limits.

Challenge: Precina is keen to expand its impact, helping the growing number of Americans diagnosed with Type 2 diabetes. To do this, they need to connect with physicians who can refer patients to Precina – many who are too busy for long conversations with treatment providers – and quickly train their clinicians to deliver compliant, empathetic care.



“One of the key takeaways of implementing Agentforce is the infinite scalability. We can have (clinicians) practice endlessly, time after time, without judgement. It creates a much safer environment for them to try things – and the AI never gets tired.”

Dr. John Oberg
CEO, Precina Health



Solution

Precina deployed Agentforce to address both of these challenges. First, they set up Agentforce SDR: They added plain-text instructions about Precina's treatment philosophy, set guidelines for when Agentforce should reach out, and uploaded helpful documents like insurance information and provider handbooks. Similarly, they set up a coaching agent by providing instructions on how to handle patient intake calls with empathy while remaining HIPAA compliant, and connecting the agent to patient information via Health Cloud and Data Cloud so it can provide tailored feedback.

With both agents live, Precina began expanding its patient and provider base – fast. Now, Agentforce SDR reaches out to providers via email as soon as they're added to Precina's Salesforce instance. These emails are hyper-personalized with the provider's title, practice area, and other details that increase the likelihood of a response. When providers ask questions about treatment, Agentforce crafts relevant answers using the materials provided when the SDR agent was set up.

As physicians begin referring patients, Precina prepares for intake calls. Clinicians launch coaching sessions directly from the patient's record in Salesforce, record a pitch about how Precina can help manage their treatment, then Agentforce processes the pitch and provides feedback on compliance, accuracy, and empathy. This feedback gives clinicians exactly what they need to navigate real calls with patients.

With Agentforce SDR and Agentforce Sales Coach working 24/7, Precina is already helping more patients achieve a better quality of life while saving thousands in training and labor costs.

 **Prompt**

Ready to practice your discovery call with a new patient?

You have five minutes to address their main pain points, how to help, and timeline concerns.

[Start](#)

Pitch Practice



Transcription

We have entire teams dedicated to your care. We start where you're ready to start and take small steps.

[Submit for Feedback](#)

 **Feedback**

Overall Impression

addressed objections candidly

What Went Well

the value discussion hit pain points well

Areas to Improve

more proactive on differentiators

Next Steps

identify all decision makers

Salesforce accelerates the quote-to-cash process.

Salesforce is the leading customer relationship management platform with applications for sales, service, marketing, and IT. It's long been on the forefront of AI development, leading to the launch of Agentforce – autonomous AI agents that allow businesses to scale their workforce with digital labor while delivering personalized customer experiences.

Challenge: Salesforce has a rapidly growing portfolio of products and services, including newly-launched [Agentforce 2.0](#). With a catalog that includes thousands of SKUs, many supported by complex pricing models like subscription-based or consumption-based pricing, generating a quote for customers can be time-consuming. Add in rounds of approval and changing customer needs, and the quote drafting process can take hours, increasing the risk of lost deals and frustrated customers. Reps needed a better quoting solution.

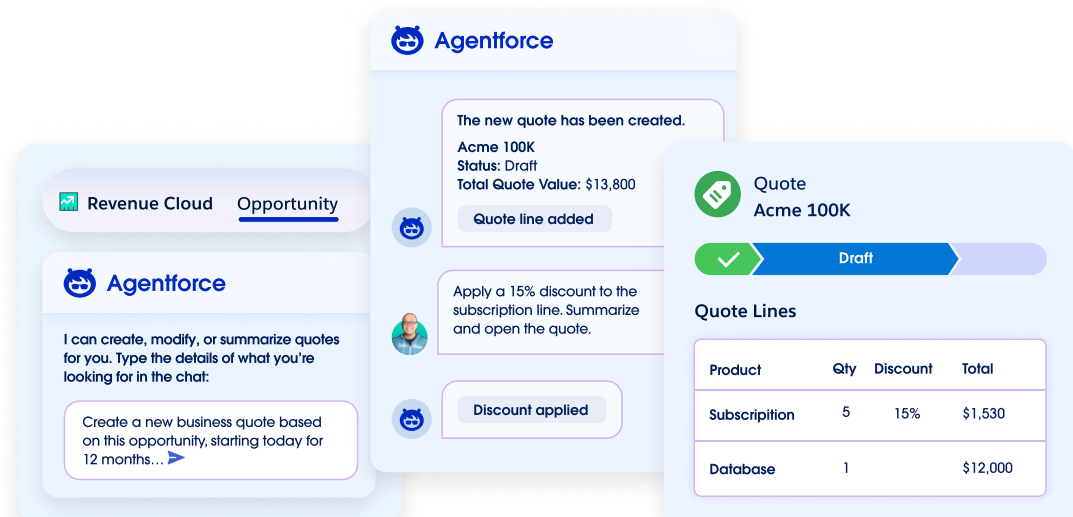
Solution

Agentforce was configured by Salesforce admins to handle quoting for busy reps, with instructions and rules easily set up in Agent Builder. Because it lives on Salesforce, it can automatically pull in trusted data from across the platform – from product catalogs to recent sales conversations – to create accurate quotes with up-to-date deal information.

Now, when a prospect is ready for a quote, the rep simply selects the Agentforce panel on the opportunity screen in Sales Cloud. A conversation box pops up and they write their quote request in plain language. For example: “Create a new business quote for this opportunity, starting today for 12 months. Then, summarize for me and open the quote.”

Agentforce analyzes the request and carries out next steps based on the deal information and available products and pricing. Then, the rep can request a PDF of the quote to send directly to the customer via email, or they can make further corrections and adjustments, like telling Agentforce to add a discount.

With Agentforce in place, reps are already seeing quotes created in 87% fewer clicks – a matter of minutes instead of hours. But more importantly, it offloads time-consuming work without sacrificing accuracy or quality. That means more time that reps can spend with customers, building relationships that lead to closed deals and long-term loyalty.



Revenue Cloud Opportunity

Agentforce

I can create, modify, or summarize quotes for you. Type the details of what you're looking for in the chat:

Create a new business quote based on this opportunity, starting today for 12 months... ▶

Agentforce

The new quote has been created.
Acme 100K
Status: Draft
Total Quote Value: \$13,800

Quote line added

Apply a 15% discount to the subscription line. Summarize and open the quote.

Discount applied

Quote
Acme 100K

Draft

Quote Lines

Product	Qty	Discount	Total
Subscription	5	15%	\$1,530
Database	1		\$12,000



Learn more about how Agentforce is changing sales for good.



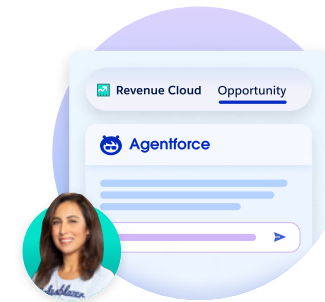
Build a limitless sales team.

Discover how Agentforce for Sales helps you build a digital workforce that lets your reps focus on high-value tasks.

[Learn more](#)

See Agentforce in action.

Watch live demos of Agentforce for Sales and see how easy it is to scale outreach, nurture leads, prepare for sales calls, and generate quotes.

[Watch demo](#)

Get hands-on with sales agents.

Learn how to build and deploy your own sales agents in our virtual Agentforce for Sales workshops.

[See workshops](#)



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