



The Sales Leader's Playbook to Driving Growth with AI

6 Ways to Grow with AI and Agents on a Single Platform



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Leaner tech stacks lead to stronger AI. Are you running your AI on rocket fuel? Or corner-store diesel?

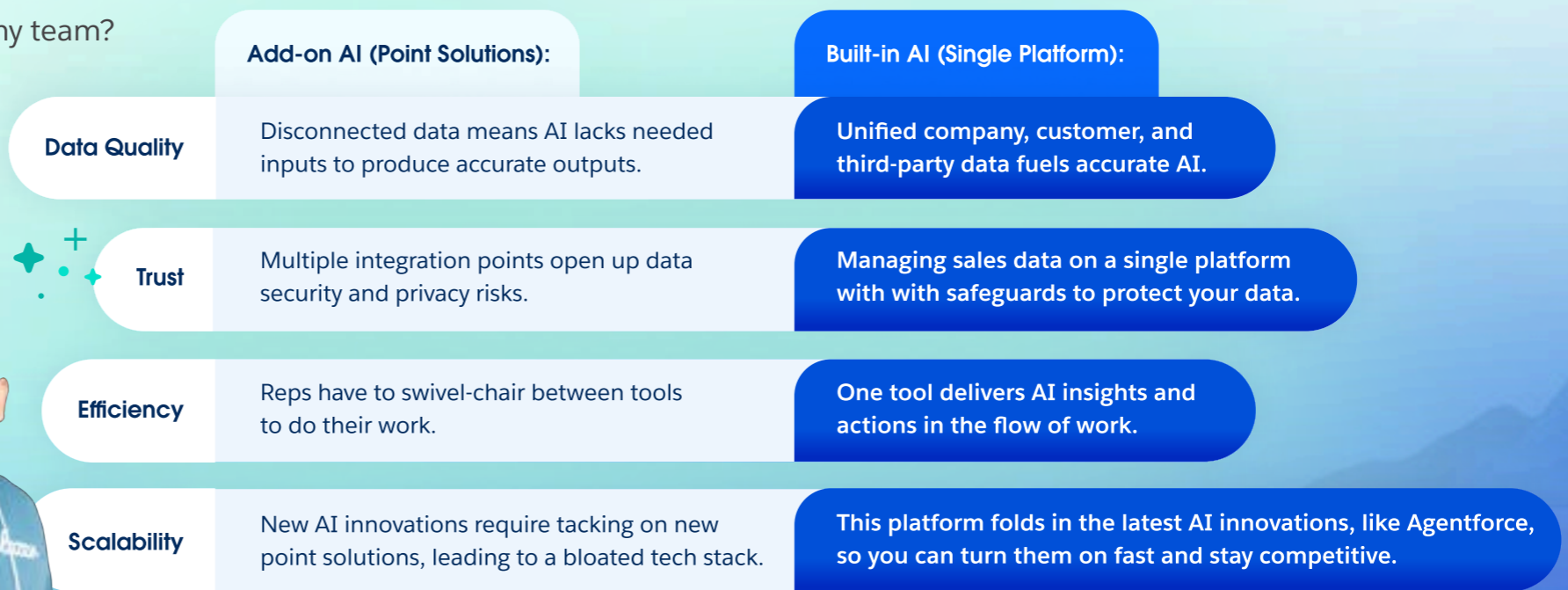
Eighty-three percent of sales teams with AI grew revenue last year – versus 66% of teams without AI. These teams are using AI to:

- Make better decisions with predictive AI, from scoring leads to spotting pipeline gaps
- Boost rep productivity with generative AI, from building action plans to summarizing calls
- Scale with autonomous agents, from nurturing inbound leads to coaching reps

You may be tempted to add quick-hit tools to your tech stack – an AI coaching tool over here and an AI lead scoring tool over there. But before you know it, your tech stack will be a hodgepodge of loosely connected systems, forcing you to make manual updates between tools. The result? Data gaps, inaccurate AI outputs, and wasted time. Patching together multiple systems will also make it harder to assure data security and privacy.

Compare that to a single platform like Sales Cloud, which connects teams, unifies data, and sets a foundation of trust. Sales Cloud then takes that data to fuel sales agents from Agentforce and help you scale with new AI tools in the future – including ones that haven’t been invented yet.

You might be thinking, “I get it. AI is awesome. But how can I set it into motion for me and my team?”



Ready to drive growth from pipeline to paycheck? Keep reading for real-life examples of maxing out the impact of AI and improving efficiency on a single platform.



Nurture inbound leads 24/7 with agents.

Challenge

Most sales teams don't have time to consistently contact every lead, which means opportunities fall through the cracks. The question becomes how to respond to every lead when your sales team has limited bandwidth.

How an AI-powered platform helps:

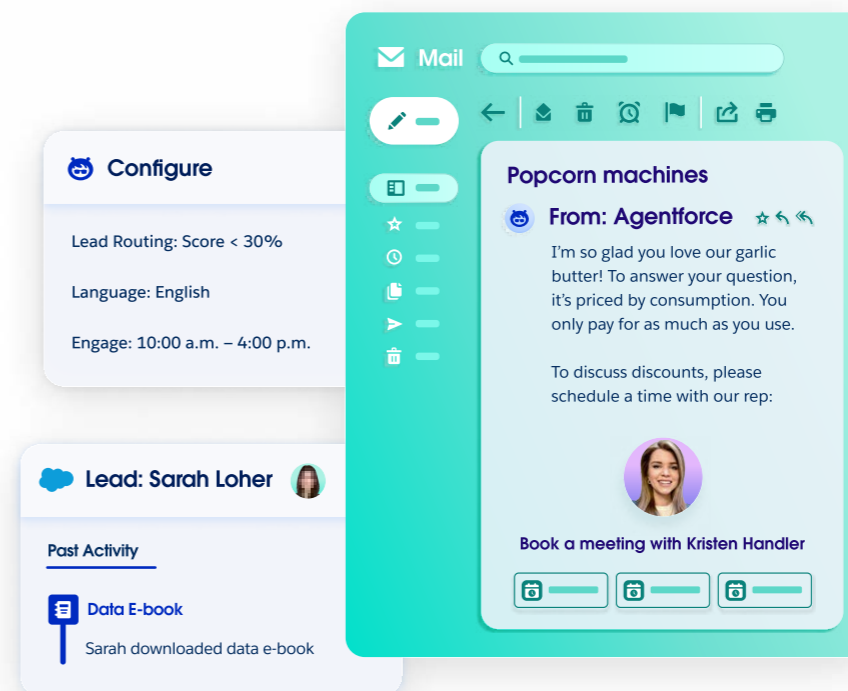
Bring your lead and external data together on one platform and use it to prioritize leads your sales team should manage. Then, hand the rest of your leads to an autonomous AI agent that can nurture them for you. When the agent has access to CRM and third-party engagement data (like downloads and browsing history), it can personalize its outreach and communication with every lead, conversing almost like a human would. When the prospect is ready to speak with a human rep, the agent can send a link to schedule a meeting.

Example of how this works in Sales Cloud:

You're a sales leader at a company that sells popcorn machines to movie theaters – and you have a backlog of leads. You ask Agentforce to contact a segment of leads based on criteria you set (such as title and company size).

Agentforce gets to work. First up: a lead who manages a movie theater franchise. Agentforce sees that the lead requested a free sample of your new garlic butter popcorn. The agent emails her to say flavor is a hit with audiences who live in her region, and attaches testimonials. She responds with a question about pricing. Agentforce responds with a helpful price list and sends her a link to schedule a meeting with a rep.

Never miss an inbound lead. In this example, the sales leader deploys Agentforce to engage with leads and hand them off to reps.



Scale your coaching with agents.

Challenge

Only a third of sales professionals say they have regular one-on-one coaching. Sales managers often don't have the time to get up to speed on every deal and give reps personalized advice ahead of important meetings. Many sales teams are bringing in AI coaching tools to help – for example, nearly half use AI-powered call coaching. But when these tools are disconnected from customer and deal data, their feedback is limited and generic.

How an AI-powered platform helps:

Using a single platform to sell brings your data together, from customer interactions to account-level deal data. An AI coaching agent can draw on this information to provide personalized, on-demand coaching for reps, helping you scale coaching across your team. The agent becomes even more powerful when you upload training documents that help it understand your selling methodology.

Example of how this works in Sales Cloud:

In step 1, we showed how Agentforce nurtured leads at the popcorn company. Now, Agentforce coaches the rep to ace the meeting. The rep opens a coaching agent from the opportunity record and rehearses their sales pitch. A coaching agent replies with detailed feedback: “Ask questions about customer needs before you launch into product features.”

The meeting goes smooth as butter, and the prospect wants to schedule another call to negotiate on price. The rep opens up Agentforce again and clicks on “Start role-play” to practice. The agent (playing the role of the prospect) asks the rep to match their current vendor's price. The rep says they'll have to check with their manager. The sales agent provides feedback, advising the rep to come to the real call with a preapproved discount. Now, the rep is ready for game day.

This example shows the power of giving every rep a dedicated coach, from pitch practice to role-plays of sales conversations.

The screenshot displays the Agentforce coaching interface. At the top, the 'Agentforce' logo is visible. Below it, there are two main panels. The left panel features a 'Start Role-play' button with a robot icon, a video feed of a woman, and a text box containing the message: 'I'll have to check with my manager.' Below this is a 'Restart' button and a microphone icon. The right panel shows a video feed of a blue robot character, a progress indicator (a series of dots), and a text box with the question: 'Can you match our current vendor's price?'. To the right of this panel is a 'Role-play Feedback' box with a robot icon and the text: 'Come prepared with a preapproved discount. Spend more time reinforcing your value against the competitor.'

Create accurate quotes in minutes with agents.

Challenge

The quoting stage can feel like a trip wire. At the very moment when the customer is eagerly awaiting the quote, the rep needs to wade through the product catalog in one tool and figure out configuration and pricing in another tool. Then, because to err is human, reps often need to wait on manual approvals to ensure the quote meets compliance. This process can take hours or days when minutes count.

How an AI-powered platform helps:

When one platform houses all your deal, pricing, and product data, an autonomous agent can create a quote much faster than a human can. The agent can pull all this data together to ensure compliance and accuracy, drawing on everything from discount mentions in calls to an understanding of your company's guardrails, ensuring the quote is compliant and can be quickly approved.

Example of how this works in Sales Cloud:

We return to the example of a rep selling popcorn machines to the owner of a movie theater franchise. The prospect asks for two quotes: one quote for just the machines with a popcorn subscription and a second quote that also includes a consumption-based add-on for garlic butter (paying only for as much garlic butter as they use). The prospect also requests a discount.

No problem. The rep asks Agentforce to create the two quotes. Agentforce pulls in all the relevant kernels of data from earlier in the sales process and creates the quotes in seconds. Because the agent is grounded in the business, it can ensure the quotes will pass muster with finance. The rep sends the quotes to the prospect and they sign on the dotted line.

This example shows how Agentforce pulls together CRM data and business guidelines to create tailored quotes, faster.

Agentforce

Please create two quotes: One for 20 machines and a popcorn subscription. Two for those plus a garlic butter add-on. And apply an 8% 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

What's Included

Machines	One-Time
Popcorn	Subscription
Garlic Butter	Consumption

Calculation

Price Per Machine	USD 2,000
Number of Machines	20
Discount	8%

Use AI to close pipeline gaps and hit your forecast.

Challenge

To improve forecast accuracy, sales leaders need a way to quickly uncover both red flags and opportunities in their pipeline – from neglected deals to customers who are ready for upsells. This is hard to do when you’re using different tools, like forecasting in a point solution and moving activities across stages manually. You’ll miss real-time insights due to time lags across tools and you won’t spot risks until it’s too late.

How an AI-powered platform helps:

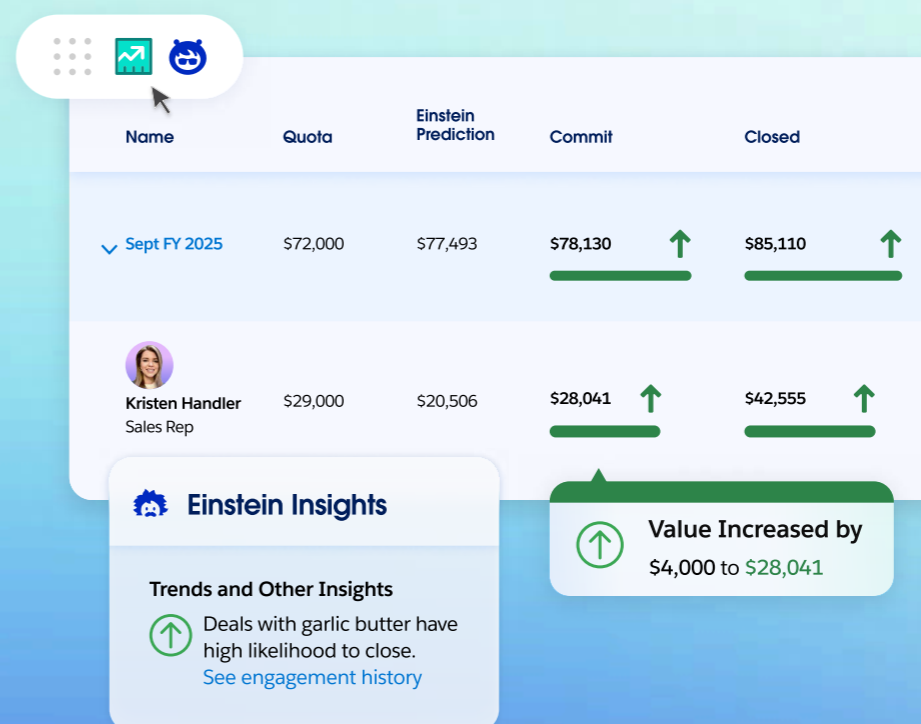
When AI has a complete view of your business, it can study historical deals, open pipeline, and real-time data from sales interactions. Then, it can make predictions about what will happen in the future and surface these insights in the flow of your work. In the end, reps know the next best actions to take to close their deals, and you know what moves to make in your pipeline to make your forecast.

Example of how this works in Sales Cloud:

Imagine you’re the sales leader at the popcorn company from the previous example. You’re at risk of missing your targets, so you use Sales Cloud to find more deals to bring into the quarter. You open up “Pipeline Inspection” and sort open opportunities based on their AI-driven opportunity scores. This helps you zero in on the strongest deals.

Then, you open up “Deal Insights” and discover these deals have one thing in common: garlic butter. That product has a higher win rate than average. You ask Agentforce to create personalized close plans with step-by-step guidance on how to advance these accounts.. Confident that these deals are on track, you adjust your forecast and close the quarter strong.

Consolidated data makes it easier to use AI to improve forecast accuracy. This example shows you how.



Motivate reps to sell more with automated commissions.

Challenge

Motivating your reps with incentives is a key way to align your business goals with your sales strategy, whether you're trying to sell more of a new product or introduce a new pricing model. But when your compensation process is manual, it can be a headache to continually update comp plans to align with your goals and evaluate their impact on sales performance.

How an AI-powered platform helps:

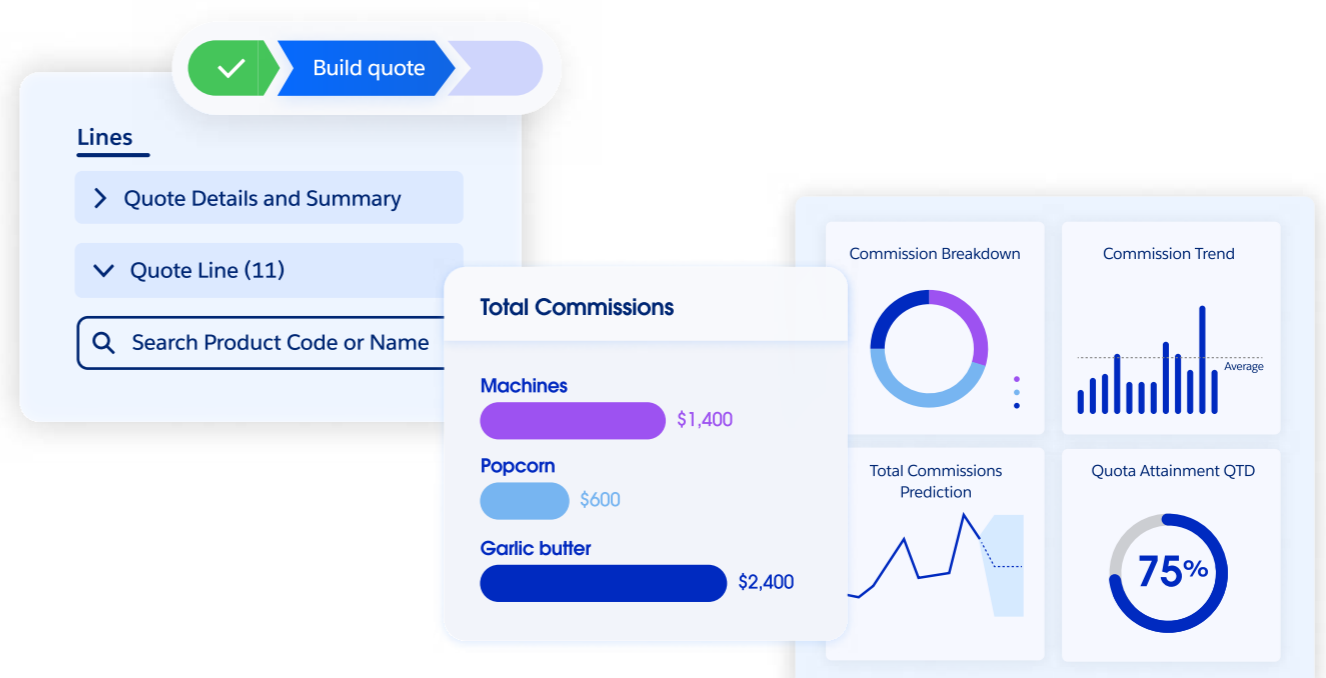
Bring your comp plans onto the same platform where you sell. This makes it possible to connect your planning to commissions and update incentive plans on the fly. The platform can take in data from current compensation, seller profiles, and the product catalog, and make updates to incentive plans based on goals you set. As reps converse with customers and create quotes, they can see the impact on their commissions if they sell certain products and contracts. This motivates the right selling behaviors to align with your business strategy.

Example of how this works in Sales Cloud:

We return to the popcorn machine company. It's clear that customers are loving the garlic butter, and they'll pay more for the option. But your reps are still pushing the normal butter flavor because it's what they're used to selling. Luckily, you have a plan.

You open up Incentive Compensation Management in Sales Cloud and add a new incentive for selling garlic butter. Because the product catalog is connected to your compensation management tool, Sales Cloud can show reps how much their commissions will go up if they add garlic butter, right from the quote. The end result? Your reps put in the effort to talk about garlic, get more comfortable with the new SKU, and end up closing more garlic-butter deals.

This example shows how a single platform makes it easy to automate commissions, motivating reps to sell the products that align with your priorities.



Speed up partner selling with AI.

Challenge

Partner selling is making its impact known: 84% of sales professionals say partner selling has a bigger impact on revenue than a year ago. The companies who win with partners are the ones that bring their partners into the fold as quickly as possible. But this is hard to do when partners can't access the data, enablement, and AI they need to succeed.

How an AI-powered platform helps:

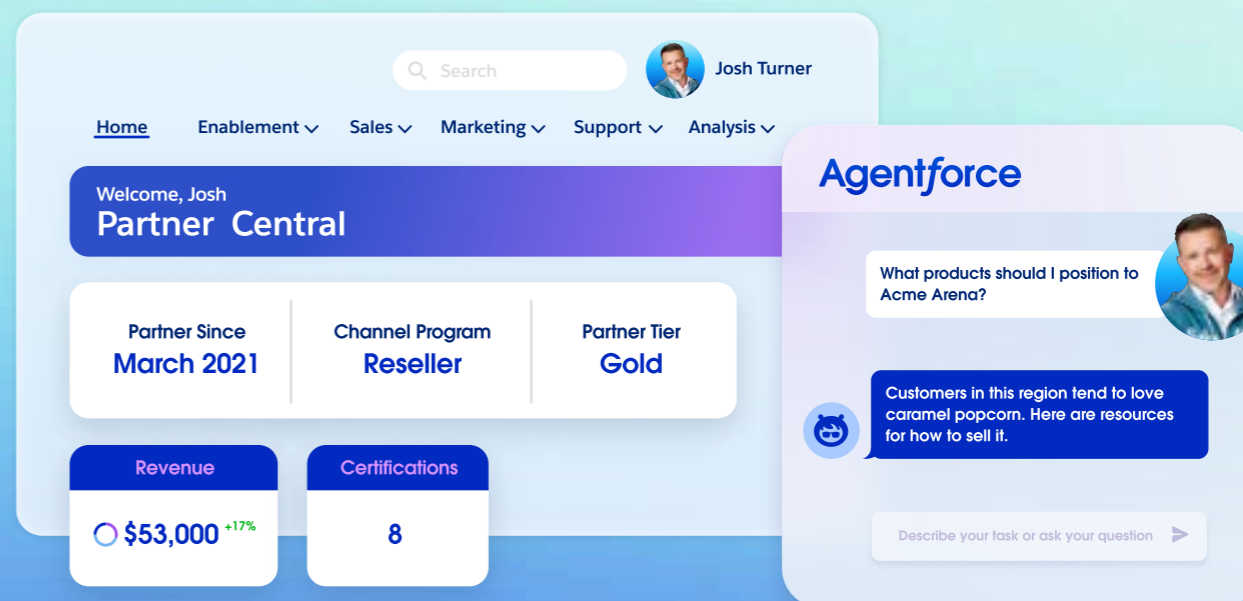
By now we've shown several ways you can bring company, customer, and deal data together, ground it in trust, and infuse it with the latest AI. This is a must for your sellers. But it's also a must for partners. A single platform makes it easy to provide partners with the same up-to-date company, lead, and product information that your sellers use – with controls that give you the choice of how much access to provide each partner.

Example of how this works in Sales Cloud:

The previous examples tell the story of a sales leader who is taking over the world with popcorn and garlic butter – one movie theater at a time. Now, that sales leader wants to expand into arenas. They identify partners who can help enter new regions quickly: catering distributors, concession retailers, and wholesale resellers. The sales leader powers up partner relationship management to onboard them.

The partners get moving fast with access to AI agents, making it easy to get enabled on customer details, learn the ins and outs of selling popcorn, and match customers with the best products. Different partners enjoy different levels of access and types of experiences, based on their selling motions. Finally comes an alert in Sales Cloud. A reseller has just closed its first arena deal. Nothing corny about that.

This example shows how to create an engaging and easy-to-use partner experience, using unified data and AI.



The screenshot displays a user interface for a partner portal. At the top, there is a search bar and a user profile for Josh Turner. The main navigation includes Home, Enablement, Sales, Marketing, Support, and Analysis. A welcome message for Josh is followed by a 'Partner Central' header. Below this, three key metrics are shown: Partner Since (March 2021), Channel Program (Reseller), and Partner Tier (Gold). Two summary cards are visible: Revenue at \$53,000 with a +17% increase, and Certifications at 8. On the right side, an 'Agentforce' chat window is active, showing a question about product positioning for Acme Arena and an AI-generated response about caramel popcorn resources.



Set a foundation for growth with unified data and AI on a single platform.



Unleash growth now with the #1 CRM.

Set the foundation for revenue growth with sales force automation. Discover how Sales Cloud features can help with unified customer data and AI.

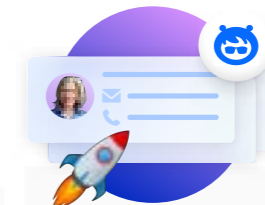
[Learn more](#)



Watch how humans with agents drive growth.

See Sales Cloud features in motion, and boost productivity from pipeline to paycheck – with agents to help along with way.

[Watch demo](#)



Scale effortlessly with Agentforce.

Watch Agentforce for Sales in action and see how easy it is to get your digital workforce up and running in minutes.

[Watch demo](#)



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