

SALESFORCE SUCCESS PLANS

4 Steps to Achieve Success with Agentforce

From assessing your AI readiness to optimizing performance, this expert guide will help you create a path for long-term Agentforce success.



Build for tomorrow, today — with **Agentforce**

[Agentforce](#) is the digital labor platform that brings humans and agents together to drive customer success. And while turning on Agentforce is easy to do, the true impact comes when you take a strategic, end-to-end approach that aligns with your unique business goals and customer needs.

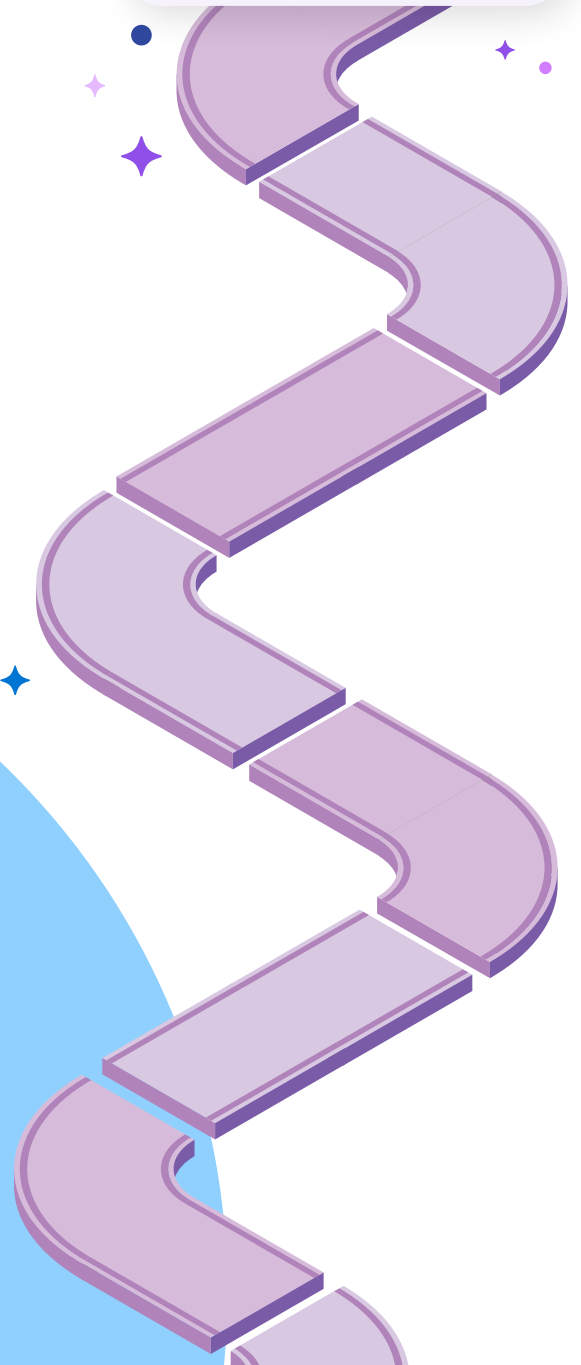
In this guide, our AI experts will walk you through the four essential steps to set your organization up for lasting Agentforce success. You'll learn how to:

- Assess your Agentforce readiness
- Evaluate your platform architecture
- Establish guardrails and governance
- Foster ongoing learning and adoption



Let's get started!

See how easy it is to [build your first agent on Trailhead](#).



1 Assess your Agentforce readiness

Before starting your Agentforce journey, it's essential to evaluate how ready your organization is for agentic AI. Some companies are rolling out pilot use cases, while others are just beginning to think about how AI could address their needs.

Work with your IT team or bring in experts, like Salesforce Customer Success Managers (CSMs) or Success Guides, to evaluate your organization's readiness across three key areas:

People

Does your team have the time to focus on building an Agentforce strategy? Has someone committed to being the lead for the project? Have you secured buy-in from stakeholders?

Process

What's your workback timeline? How will you measure success? Have you evaluated ethical concerns and guardrails you'll need to establish?

Technology

Have you purchased the right licenses and products to properly use Agentforce? Are the licenses correctly assigned in production? Do you have a data framework to ensure accurate AI outputs?

To achieve success with Agentforce, you'll need to be proficient in each of these categories. Asking these questions will provide a clear picture of where you're excelling, and which areas might need more attention, before you're ready to take the next step.

What is agentic AI?

It's a type of artificial intelligence that can make decisions and take action on its own, based on the parameters you lay out. Agentic AI, like AI agents, helps businesses increase productivity by scaling workforces without needing constant instruction.

Your learning path

To get started with this first step, check out these resources:



[Understand the Basics of AI Agents and Agentforce](#)



[Build Your Own AI Strategy and Roadmap](#)

2 Evaluate your platform architecture

Even with the right tools, a poorly architected platform will limit your ability to scale and deliver the secure, innovative Agentforce experiences your customers and employees expect.

Evaluate your architecture by examining the following:

Availability

Ensure your system can run optimally when you need it most. Identify potential failure points and create a plan to fix weaknesses to minimize downtime.

Performance

Make sure your system can handle the volume of requests that are needed to retrieve data and run AI workloads. Increase capacity limits to make sure your platform is performing under pressure without any latency.

Scalability

Connect your data to allow for fast and accurate retrieval. Plan both short- and long-term strategies to manage data volumes as your Agentforce usage expands.

Bring in Agentforce experts, such as Salesforce Architects, to conduct a thorough review of your platform, identify areas for improvement, and partner with you to architect for AI.



“By establishing a scalable and reliable foundation now, you avoid costly rework later and ensure that you can integrate new AI capabilities seamlessly as they emerge. Ultimately, this positions you to drive sustainable growth, improve operational efficiency, and maintain a competitive advantage.

– Amy Matthews

VP, Regional Success Architecture

Your learning path

To get started with this second step, check out these resources:



[Get Best Practices to Architect for AI](#)



[Unlock your Data for Better Agentforce Experiences](#)

3 Establish guardrails and governance

Ensure the quality, accuracy, and ethical use of AI by establishing a strong governance strategy from the start. Bring together key stakeholders from across the business – such as IT, operations, sales, and beyond – to collaborate on use cases, co-create an Agentforce roadmap, and set up clear guardrails.

Consider involving external partners, such as Salesforce AI experts, to bring outside perspectives and industry best practices to your strategy. Together, this team will:

Enforce standards

Establish and maintain a governance framework for AI, ensuring consistency across teams and adherence to regulations.

Monitor and optimize

Track performance and adjust Agentforce usage to align with your KPIs as business priorities or regulations change.

Foster innovation

Evaluate new tools, encourage continuous improvement, and explore new Agentforce use cases in an ethical and trusted way.

By including people from across the business, you're holding everyone jointly responsible for using Agentforce ethically. This central team will ensure best practices and solidify your AI success for the long-run.



Your learning path

To get started with this third step, check out these resources:



[Learn How to Create Guardrails for Ethical, Safe AI](#)



[Measure and Optimize Performance with the Customer Success Score](#)

4 Foster ongoing learning and adoption

AI isn't a one-time initiative. It's an ongoing journey. To get the most from your Agentforce investment, create a culture of continuous learning that allows employees to experiment and fail fast.

You should also create an adoption roadmap, tailored to your organization's unique needs, to ensure your workforce is using Agentforce to its full potential. Your adoption roadmap should include:

Training programs

Offer Agentforce-specific learning resources, such as Trailhead, [virtual interactive workshops](#), and individual sessions, to upskill your technical teams on an ongoing basis.

Certifications

Provide opportunities for employees to earn formal certifications. With Salesforce's [AI for All initiative](#), your technical teams can build their AI skills and gain impressive credentials at no cost.

Employee Recognition

Encourage people by publicly recognizing early adopters. Rewards can be financial, like a bonus or prize, or unpaid recognition, like awards or companywide shoutouts.

Your Agentforce strategy is only as good as your organization's willingness to adopt it. Salesforce AI experts can work with you to create a learning strategy that's tailored to your organization's goals and culture.

Your learning path

To get started with this last step, check out these resources:



[Get Expert-Led Coaching to Increase Agentforce Adoption](#)



[Learn Change Management Strategies for AI Implementation](#)

Achieve your **Agentforce** goals with the help of **Salesforce experts**.

With [Success Plans](#), you get more value from your Salesforce investment. You'll get access to on-demand learning resources, personalized guidance, and a team of AI experts who'll work with you at every stage of your Agentforce journey.

Ready to take the next step? See how **Salesforce Success Plans** can help you [achieve Agentforce success](#) and build for tomorrow, today.

