

Agentforce AI Enablement Playbook for System Integrators

Introduction

Agentforce is an AI-driven automation platform designed to streamline enterprise workflows across customer service, sales, and operations. System Integrators (SIs) play a critical role in enabling Agentforce. They must consider multiple factors, including securing and managing large volumes of data and ensuring system components communicate effectively, reliably, and securely. In short, SIs are essential for operationalizing Agentforce and turning business goals into real-world solutions.

Overview of Agentforce

Agentforce Agents automate complex business tasks directly within the Salesforce ecosystem, using real-time, contextually driven data to complete tasks.

Agentforce Capabilities include:

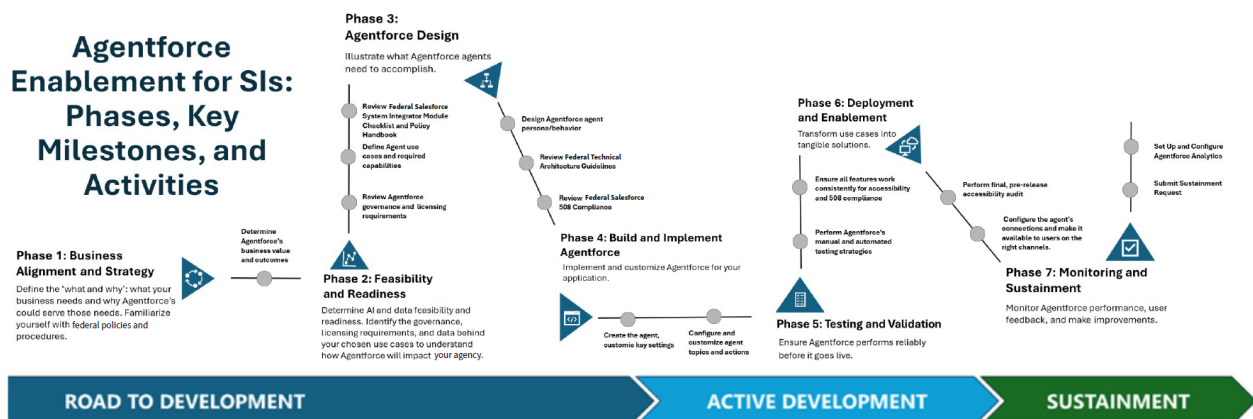
- **Integration and automation:** Secure integration of systems, APIs, agents, and workflows.
- **Agentic reasoning:** Intelligent orchestration of accurate actions, eliminating the need for extensive programming
- **Data interoperability:** Gathering of data from various systems through APIs to enable communication between agents and enterprise systems.

Purpose

The purpose of this playbook is to guide SIs in implementing Agentforce from start to finish by providing a structured approach for:

- Evaluating business goals and technical readiness for Agentforce
- Determining whether Agentforce will work with your systems
- Identifying resources to enable Agentforce
- Implementing Agentforce successfully

Each phase that follows provides planning, technical, and operational tools to effectively deliver Agentforce-powered solutions.



Phase 1: Business Alignment and Strategy

High-level goal: Define the 'what and why': what your business needs and why Agentforce could serve those needs. Familiarize yourself with Federal Agency policies and procedures.

Objectives

To effectively implement Agentforce AI into existing systems, SIs should evaluate current operations to:

- Identify problems, opportunities, and gaps where Agentforce can enhance processes
- Identify pain points in the customer's journey
- Define the expected business value and desired outcomes of Agentforce

These insights can provide a roadmap to ensure Agentforce integration aligns with business goals.

Once business needs are determined, evaluate who may be impacted by Agentforce to ensure relevant users and stakeholders are involved in decision making and implementation. Consider identifying:

- Who approves requirements
- Relevant departments
- Roles and responsibilities
- Team norms and working agreements

Summary of Activities

- Determine business needs and requirements
- Define KPIs (e.g. measurable outcomes)
- Identify users and stakeholders
- Learn about relevant processes and procedures

Key Resources

- **Business needs and requirements**
 - [Business Requirements Document Template](#)
 - [Product/Service Customer Journey Map](#)
 - [Agentforce ROI Calculator](#)
 - [KPI Template](#)
 - [Key Performance Indicators \(KPIs\)](#)
 - [Knowledge/RAG Quality Data and Metrics](#)
- **Users and stakeholders**
 - [Business Requirements Document Template](#)
 - [Federal Agency Stakeholder Communication](#)
 - [Roles and Responsibilities Alignment Template](#)
 - [Team Norms and Working Agreement Template](#)

Phase 2: Feasibility and Readiness

High-level goal: Execute the 'how and when': Determine AI and data feasibility and readiness. Identify the governance, licensing requirements, and data behind your chosen use cases to understand how Agentforce will impact Federal Agency. Map out project timelines.

Objectives

Review Agentforce governance and licensing requirements when considering issues such as:

- Allowed use cases
- Feasibility considerations
- Compliance and data boundaries

Next, assess AI readiness to evaluate ethical issues, bias, accuracy concerns, and operational capabilities; then, examine data readiness, including factors such as:

- Data sources and the types of data Agentforce will consume (structured, unstructured, real-time)
- Where data is stored (cloud, on-prem, hybrid)
- Data quality or governance concerns, data privacy, and compliance requirements (GDPR, HIPAA)

Evaluate CRM and workflows to ensure Agentforce implementation integrates smoothly and fulfills business goals. Lastly, vet and finalize use cases before submitting an Agentforce product request.

Summary of Activities

- Review Agentforce governance
- Assess licensing requirements
- Evaluate AI risks and readiness
- Evaluate data readiness
- Assess existing CRM and workflows
- Vet and finalize use cases
- Submit product request

Key Resources

- **Governance framework and licensing requirements**
 - [Agentforce AI Governance Framework](#)
 - [Federal Agency Salesforce System Integrator Module Checklist and Policy Handbook](#)
 - [Federal Agency Standard Operating Procedures for the Salesforce Platform](#)
 - [Federal Agency AI Compliance Plan](#)
 - [Agentforce Pricing](#)
 - [Salesforce Licensing Overview](#)
 - [Common Feasibility Assessment Considerations](#)
- **AI risk and readiness**
 - [Chief AI Officer AI Minimum Risk Management Resources](#)
 - [SECURE AI at Federal Agency](#)
 - [NIST AI Risk Management Framework](#)
 - [Federal Agency OIT Security Risk Management Framework](#)
- **Data readiness**
 - [How To Handle Known Data Quality Considerations in CxI Systems](#)
 - [5 Ways to Measure Your Data Readiness for an AI Agent](#)
 - [Agentic AI Starts with Harnessing Unstructured Data: 20 CIOs share their strategies](#)
 - [AI + Data: Project Planning](#)
 - [PIA Guidance](#)
 - [PIA Templates](#)
- **Use cases**
 - [Federal Agency AI Use Case Inventory](#)
 - [Identify Your Use Case](#)
 - [Agentforce Use Cases](#)
- **Product Request**

Phase 3: Agentforce Design

High-level goal: Illustrate what Agentforce agents need to accomplish.

Objectives

When preparing for Agentforce enablement, the SI team should create a clear plan for how the system will work, including the overall design and where the data will be stored. The primary objectives for Phase 3 include:

- Identifying integration points across existing systems to ensure seamless connectivity
- Ensuring architecture incorporates AI and automation capabilities, including the AI personas, agent behaviors, and interaction patterns
- Developing a thorough understanding of user roles, permissions, prompts, and guardrails to maintain security and privacy

Summary of Activities

- Document technical requirements
 - Document integration points, data, channels, routing and escalation, and security controls
 - Create data flow diagrams and dependencies
- Integrate accessibility requirements and design with best practices in mind
- Design/customize Agentforce features and agent persona/behavior
 - Create prompts and define agent guardrails
 - Design topics and actions
- Conduct architecture review process
 - Document risks, concerns, and risk mitigation strategies
- Document processes and workflows
- Review with stakeholders for sign-off

Key Resources

- **Technical requirements**
 - [Federal Agency Technical Architecture](#)
 - [Guidelines Architecture Diagrams -](#)
 - [Lighthouse Data Flow Diagram](#)
 - [Define the Technical Requirements](#)
 - [Federal Agency Salesforce 508 Compliance](#)
- **Agentforce design and agent behavior**
 - [Agentforce: Agent Planning](#)
 - [Design Your Agent](#)
 - [Define Agent Guardrails](#)
 - [Identify Risks and Guardrails for an Agentforce Project](#)
 - [Prompt Engineering](#)
 - [Admin Permissions Needed list](#)
 - [Best Practices for Agent User Permissions](#)
- **Architecture review**
 - [Architecture Design Review Template](#)

- [Federal Agency Integration - Architecture Review Board](#)
- [Federal Agency PaaS Software Factory \(SWF\) End-to-End Process Learning Aid](#)

Phase 4: Build and Implement Agentforce

High-level goal: Implement and customize Agentforce for your application.

Objectives

In Phase 4, the primary objectives are to create an Agentforce agent, customize key settings and actions, and connect a data library so that your agent can provide personalized answers.

Summary of Activities

- Review admin permissions needed
- Create an Agentforce agent from the default template
- Customize key Agentforce settings as needed
- Create and assign a data library to your agent
- Configure the agent with topics and actions
 - Customize standard topics such as FAQs and case management
- Create user roles and permissions
- Conduct smoke and unit testing to catch and document accessibility issues early
- Document deployment steps

Key Resources

- **Agentforce creation and customization**
 - [Admin Permissions Needed list](#)
 - [Agentforce Implementation Guide for Customer-Facing Agents](#)
 - [Agentforce Implementation Guide for Employee-Facing Agents](#)
 - [Build Your Agent](#)
 - [Best Practices for Agent User Permissions](#)
 - [Agentforce Glossary of Terms](#)
- **Federal Agency Resources**
 - [Federal Agency Quick Start On-Boarding Guide for Copado](#)

Phase 5: Testing and Validation

High-level goal: Ensure Agentforce performs reliably before it goes live.

Objectives

Phase 5 focuses on test planning, various testing methods, and documenting test scenarios and data. While the Federal Agency Compliance Team will perform an audit for 508 compliance, the onus is on the System Integrator project team to run a complete end-to-end test to ensure 508 compliance.

Summary of Activities

- Create a test strategy/plan
- Identify test types (functional, performance, security, feature regression).
- Perform manual and automated testing strategies for Agentforce
- Create a test repository with appropriate folder structure and naming conventions
- Document test scenarios, including positive and negative
- Ensure all features work consistently for accessibility and 508 compliance
- Host UAT; include users with disabilities to validate real-world accessibility

Key Resources

- [Federal Agency Standard Operating Procedures for the Federal Agency](#)
- [Salesforce Platform Sandbox Refresh Steps - Federal Agency Org](#)
- [Test Your Agent](#)
- [Use the Test Results](#)
- [Testing Research/Resources](#)
- [Federal Agency Salesforce 508 Compliance](#)

Phase 6: Deployment and Enablement

High-level goal: Transform use cases into tangible solutions.

Objectives

Once you determine your agent performs reliably, accurately, and securely, it's time to roll out your deployment strategy, communicate the launch, train users and determine how to support them.

Summary of Activities

- Perform final, pre-release accessibility audit
- Launch deployment strategy/follow documented deployment steps
- Configure the agent's connections in your sandbox environment.
- Complete end-to-end testing.
- Deploy to your staging or production environment.
- Create a communication plan and communicate the launch
- Create documentation to support users
- Train users and support adoption
- Determine how users will be supported moving forward

Key Resources

- **Deployment**
 - [Deploy Your Agent](#)
 - [Federal Agency Standard Operating Procedures for the Federal Agency](#)
 - [Salesforce Platform Federal Agency Deployment Guide](#)
 - [Integration Release Management Process](#)
 - [Federal Agency Salesforce: Release](#)
 - [Management Federal Agency PaaS Release Management](#)
- **Communication and Training**
 - [Communication Campaigns](#)
 - [Preparing Federal Agency](#)
 - [Employees for AI AI Awareness Training](#)

Phase 7: Monitoring and Sustainment

High-level goal: Monitor Agentforce performance, user feedback, make improvements, and hand off to Sustainment.

Objectives

After Agentforce is launched, the next step is to test, measure, and optimize your agent's performance to ensure long-term success, accessibility, and continuous improvement.

The final stage is transitioning to Sustainment. To enter the Sustainment Entry Stage, Federal Agency requires

- that: Development is complete
- All components have been deployed to Production
- The module is stable
- User support documentation has been provided
- A demo of the module has been provided to the Federal Agency
- Automated testing suites have been provided (once enforcement begins)
- The BO has signed off on functionality and user experience in Production

To enter sustainment, the SI must complete a Sustainment Transition with the Federal Agency Sustainment Team.

Summary of Activities

- Turn on Agentforce's Audit and Feedback feature to capture data about prompts, user feedback, and generated responses
- Monitor and test for 508 compliance and accessibility issues and collect user feedback
- Configure Agentforce analytics
- Monitor KPIs and user feedback for continuous improvement
- Submit Sustainment Request

Key Resources

- [Monitor Your Agent](#)
- [Set Up Audit and Feedback](#)
- [Agentforce Analytics Reports](#)
- [Knowledge/RAG Quality Data and Metrics](#)
- [Sustainment Request Process for Federal Agency](#)