

Success Story

Future-Proofing Sales Team Success with **Effortless Agentforce Adoption**



Introduction

A large US Enterprise recently adopted Salesforce for its Sales Team. Accustomed to using Excel-based systems, migrating to Salesforce appeared somewhat challenging for them. They wanted to streamline this transition for end users and enhance overall adoption rates, so they approached Exavalu.

Coinciding with this effort, the launch of Agentforce presented an opportunity to help them improve adoption and initiate their journey with the platform.

The Challenge

Their Sales Team lacked prior experience with Salesforce. Although they recognized the move to Salesforce as a positive step, they encountered several challenges in adapting to the new platform. One of them was navigating multiple screens for various tasks, as opposed to the simplicity of scrolling through an Excel sheet. The team sought solutions to streamline their daily tasks within Sales Cloud, establish a structured onboarding process for new sales personnel, and enhance overall platform adoption.

How Exavalu Made an Impact

We developed a Sales Agent within four weeks of our engagement to assist sales representatives in managing their daily tasks. It eliminated the need to navigate multiple screens in Salesforce and could receive conversational commands.

The agent provided a daily meeting schedule, delivered a comprehensive account summary - encompassing account history, open opportunities, contracts, and other critical details - which would typically require at least 30 minutes to compile manually. Additionally, the agent generated opportunity summaries and highlighted key discussion points for executive-level calls.

We also integrated an enhanced feature to enable sales representatives to document meeting discussions, record meeting notes, and segment these notes further into actionable items. The agent facilitated updates such as modifying contact titles, adding or updating products associated with opportunities, and setting up future reminders. These tasks, which would typically take a novice 45 minutes to an hour to complete, were streamlined for efficiency.

The Results and Benefits

- The implementation delivered immediate benefits. Their team appreciated the feature of submitting conversational requests to the Sales Agent and receiving results or making updates seamlessly without navigating away from the interface.
- The adoption of the application increased by 20%, reflecting the team's positive response to the streamlined workflow.
- Additionally, the time required to complete various tasks was reduced by 50%. This allowed the sales team to dedicate more time to revenue-generating activities rather than routine administrative tasks.
- With updates being consistently recorded in Salesforce, the leadership team gained access to more accurate and real-time reports directly within the platform. This advancement enabled the organization to retire its legacy system and switch to the new solution.