GLOBAL INDUSTRIAL FLUIDS MANUFACTURER · 150 SALESFORCE USERS

Six-week Agentforce pilot: go or no-go evidence for a global manufacturer

6
weeks from kickoff to go or no-go evidence

8+
Flow and validation-rule conflicts resolved so agents could run

~30%
estimated cut in rep research time

THE PROBLEM

Field sales managers spent about 60 percent of their time on administration. Leads arrived from marketing unqualified and in bursts. Pre-built Agentforce agents did not fit the company's custom objects for special pricing agreements and no-charge trials, and existing Flows, validation rules and permissions blocked them from running. The company wanted evidence before committing to an enterprise rollout.

WHAT WE DID

We ran the pilot against a jointly prioritized backlog with a fixed hour budget. We configured a Data Library across Sales, Service and Data Cloud so agents had full context, tuned two pre-built agents for lead handling and pipeline insight to the company's objects and terminology, prototyped a custom agent for technical product recommendations, resolved more than eight Flow and validation-rule conflicts, and set up agent analytics so management could see adoption and productivity. The pilot ran with ten district sales managers, including testing in Spanish.

RESULTS

1. Leadership had the evidence for a go or no-go decision on enterprise rollout within six weeks.
2. Working agents for lead ranking and pipeline insight in the production org.
3. Rep research time cut by an estimated 30 percent.
4. Three follow-on use cases identified and sized: multilingual responses, lab competitive-intelligence data through Data Cloud, and win-revenue tracking.

CLIENT
Global industrial fluids manufacturer, about 150 Salesforce users, two-person admin team

OUR ROLE
Pilot enablement and architecture guidance

SYSTEMS
Salesforce Sales Cloud, Service Cloud, Data Cloud, Agentforce

TIMELINE
Six weeks, early 2026

> *Two pre-built agents tuned to the company's custom objects; a product-recommendation agent prototyped; ten district managers in the pilot.*