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WHITEPAPER · 2026

Is your organization ready for Agentforce?

A practical readiness framework for Salesforce owners and sponsors

Setlerz IT Solutions
Certified Salesforce Consulting Partner | www.setlerz.com

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About Setlerz

Setlerz IT Solutions is a certified Salesforce Consulting Partner headquartered in Pune, India, with a US presence in Sheridan, Wyoming. Founded in 2023, the team holds 13+ Salesforce certifications and carries a 4.95 rating on Salesforce AppExchange. Setlerz supports businesses that need Salesforce to work and consulting firms that need delivery capacity.

01 Executive summary

Agentforce is easy to want and hard to land. Many organizations can describe what they would like an agent to do, but far fewer can say with confidence whether their data, their Salesforce org, their governance and their people are ready to support one.

This paper gives Salesforce owners, CRM leaders and sponsors a practical way to answer that question before committing budget. It is built on the same six-area lens Setlerz uses when scoping real Agentforce engagements, and on lessons from delivered Salesforce projects in manufacturing, consumer goods and energy and utilities.

What you will take away

- The four patterns behind most stalled Agentforce pilots, and how to spot them early.
- Six readiness areas, with what good looks like, the warning signs and the first move for each.
- How to read a readiness result and what to do in the next 90 days, whichever band you land in.
- A short checklist you can use in your next planning meeting.

The central argument is simple. Agentforce does not fail because the technology is immature or because the idea is wrong. It stalls because the foundation underneath it was never examined. Teams that spend a few focused weeks on that foundation reach a credible pilot faster than teams that start with a build.

12	6	4
questions in the Setlerz readiness assessment	readiness areas covered	result bands, from Foundation First to Ready to Scale

02 Why Agentforce pilots stall

In conversations with Salesforce owners, the same few reasons come up again and again. None of them is about the model itself. All of them can be addressed before a single agent is configured.

1. No clear, prioritised use case

"Use AI in service" is an ambition, not a use case. Without a specific task, a defined user, a measurable outcome and an owner, a pilot has nothing to be judged against.

2. A weak data foundation

An agent is only as good as the data it can reach. Duplicate records, inconsistent fields and customer data scattered across systems produce confident but wrong answers.

3. Nobody owns adoption

The technology gets built and then sits unused because no one is accountable for changing how people work, training them or measuring use.

4. Governance as an afterthought

Questions about access, trust, auditability and what an agent may or may not do arrive late, usually from security or legal, and stop the project.

The common thread

Each of these is a readiness problem, not a technology problem. That is why a short, structured assessment before the build is one of the highest-return steps in an Agentforce programme.

Why the order of work matters

Teams often start with the visible part, such as configuring an agent, writing prompts and testing responses, because that is where the excitement is. The less visible work of clarifying the use case, cleaning the data, tightening governance and preparing people tends to be pushed back. When it finally surfaces, it is expensive, because the build has to be reopened.

Reversing that order does not slow the programme down. It moves the discovery of problems to the stage where they are cheapest to fix.

03 The six readiness areas

The Setlerz Agentforce readiness assessment covers six areas through 12 questions. Each area below is described in the same way: what good looks like, the warning signs, and the first move.

1. Use case clarity

What good looks like. One to three specific use cases, each with a named user, a defined task, a measurable outcome and a business owner. The use cases are ranked, and the first one is small enough to pilot in weeks, not quarters.

Warning signs. The use case is described as a technology ("we want an agent") rather than a problem ("we want to cut the time it takes to answer order-status questions"). There is no agreed way to tell whether it worked.

First move. Write each candidate use case on one page: the user, the task, today's process, the target outcome and the owner. Rank them by value and by how ready the underlying data is.

2. Data foundation

What good looks like. The data an agent needs is identifiable, reasonably clean and reachable. There is a clear view of the customer across systems, or a plan to build one, often through Data Cloud.

Warning signs. Duplicate accounts and contacts, free-text fields doing the work of structured ones, no agreed definition of key terms, and customer data held in systems that do not talk to each other.

First move. Audit only the objects and fields the first use case depends on. Fix those first, rather than attempting to clean the whole org.

3. Salesforce and CRM maturity

What good looks like. The org is well understood, documented and maintainable. Core processes run on standard patterns, and there is a release process that uses sandboxes.

Warning signs. Heavy undocumented customisation, automation that nobody dares to touch, an org running near its governor limits, and changes made straight into production.

First move. Run a short health check on the org before adding anything new. An agent added to an unstable org inherits its instability.

4. Governance and trust

What good looks like. Clear rules for what an agent can see, say and do. Defined escalation to a person, a way to review conversations, and agreement from security, legal and compliance stakeholders.

Warning signs. No named owner for AI risk, no definition of acceptable answers, and no plan for what happens when an agent is wrong.

First move. Bring security and compliance in during use-case selection, not at go-live. Agree the boundaries in writing.

5. Team and change readiness

What good looks like. The people who will work alongside the agent have been involved in designing it. Someone owns adoption, training is planned, and success is measured in terms of use, not only delivery.

Warning signs. Frontline teams first hear about the agent at launch. There is no champion, no training plan and no feedback loop.

First move. Name an adoption owner and recruit two or three frontline users to shape the pilot.

6. Integration and budget

What good looks like. The systems an agent must connect to are known, their APIs are understood, and the budget covers not just the build but run, monitoring and iteration.

Warning signs. Funding that stops at go-live, integrations that surface late, and no one responsible for the agent after launch.

First move. Map the integrations the first use case needs and budget for the first six months of operation as well as the build.

04 Reading your result

The Setlerz assessment returns a score for each area and an overall band. The bands are designed to point to a sensible next step, not to grade you.

Not Yet Ready: Foundation First
Significant gaps in several areas. Invest in data, the org and a clear use case before building.

Early Stage: Build the Basics
Some foundations in place. Close the two or three weakest areas, then choose a first use case.

Ready to Pilot
Strong enough to run a focused pilot. Keep scope tight and measure results.

Ready to Scale
Mature foundations. Focus on governance at scale, adoption and expanding use cases.

What each band usually means in practice

Band	Typical priorities for the next 90 days	What to avoid
Foundation First	Clarify one use case. Audit the data it needs. Run an org health check. Name an owner.	Starting a build, or buying licences ahead of need
Build the Basics	Close the weakest two areas. Agree governance boundaries. Plan a pilot.	Trying to fix everything at once
Ready to Pilot	Select one use case, define success, build with a small group, review weekly.	Widening scope before the pilot proves value
Ready to Scale	Formalise governance, monitoring and an operating model. Add use cases in order of value.	Letting adoption lag behind delivery

Read the weakest area, not just the total

An overall score can hide a single area that will stop the project. A strong result in data and CRM does not compensate for having no adoption owner. Look first at the lowest-scoring area, because that is usually where a pilot will break.

05 A 90-day path to a first pilot

The path below suits organizations in the Early Stage and Ready to Pilot bands. Organizations in Foundation First can use the first 30 days as a starting point and extend them.

1. **Weeks 1 to 2: Assess and align**
   Complete the readiness assessment with the people who own data, the Salesforce org, security and the business process. Agree the weakest areas and the first use case candidates.

2. **Weeks 3 to 4: Choose and define**
   Pick one use case. Write the one-page definition: user, task, outcome, owner, measure. Agree governance boundaries with security and compliance.

3. **Weeks 5 to 8: Prepare the foundation**
   Fix the data the use case depends on. Stabilise the org areas it touches. Map and test integrations. Name the adoption owner and recruit pilot users.

4. **Weeks 9 to 12: Pilot and review**
   Build and release in sprints into a sandbox first. Run the pilot with a small group, review weekly, and compare against the measure defined in week 4.

5. **After day 90: Decide**
   Decide to scale, adjust or stop, based on evidence. Plan run costs, monitoring and the next use case.

The principle behind the plan

Small, measured and reviewable. A pilot that proves one thing is worth more than a launch that attempts five.

06 Lessons from delivered Salesforce work

Agentforce is new, but the disciplines it depends on are not. The three Setlerz engagements below, published on setlerz.com, show the habits that make advanced capabilities succeed.

Manufacturing: do more with less

Aggressive IT budget cuts forced a rethink of an underperforming Salesforce investment. Setlerz worked with executive stakeholders on outcomes, then redesigned the architecture around business-function objectives. It stayed inside governor limits and was configurable enough for the client's team to maintain. *Lesson: a maintainable, well-scoped org is the base for everything that follows.*

Consumer goods: phase the risk

A retail execution solution across more than 5 million stores, after two earlier partners had failed. Setlerz designed the backend around the functions that mattered and built a front end with bi-directional sync to Salesforce, enabling a module-by-module go-live. *Lesson: phased delivery beats a single high-risk launch, and applies directly to an Agentforce pilot.*

Energy and utilities: one view of the customer

Service and customer data were siloed between partner and customer operations. Setlerz delivered a service portal across service, partner and customer community clouds on Lightning, with single sign-on. *Lesson: a unified view of data comes before intelligent automation.*

Across all three, the pattern is the same: align on outcomes first, keep the architecture maintainable, release in stages, and involve the client's own team. That is also the pattern for a successful agent.

07 A practical checklist and next step

Use these questions in your next planning meeting. If you cannot answer “yes” to most of them, you have found where to start.

Area	Question	Done
Use case	Can we describe our first use case in one page, with a named owner and a measure?	☐
Data	Do we know which objects and fields the first use case depends on, and are they clean?	☐
CRM	Is the org documented, stable and released through sandboxes?	☐
Governance	Have security and compliance agreed what the agent may see, say and do?	☐
Team	Is someone accountable for adoption, with pilot users identified?	☐
Budget	Does the budget cover run, monitoring and iteration, not only the build?	☐
Pilot	Have we agreed how we will decide to scale, adjust or stop?	☐

Take the free Setlerz Agentforce readiness assessment

Twelve questions, six readiness areas, about four minutes. You receive a scored breakdown and what to fix first. It is free and carries no commitment. Start at **www.setlerz.com/#assessment**, or book a call at calendly.com/setlerz to talk through your result with a certified Salesforce consultant.

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Find out where you stand.

Take the free Agentforce readiness assessment, or talk to a certified Salesforce consultant about your result.

Free Agentforce readiness assessment

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