

J P W C O N S U L T I N G

---

# Agentforce Accelerated

## Lessons Learned from a Global Enterprise Deployment

---

*An Executive Summary for AI Adoption and Sales Transformation*

Prepared by JPW Consulting | 25 Years of Enterprise Salesforce Expertise

## Introduction

A global Fortune 200 fintech company set out to modernize its sales operations through artificial intelligence, the mandate was explicit. The organization needed a solution that could integrate with existing Salesforce workflows and allow the users to work within the platform, support thousands of sellers across global teams, and deliver measurable productivity gains without disrupting operations.

Rather than relying on vendor promises or analyst reports, leadership engaged **JPW Consulting** to run a head-to-head evaluation of the two leading platforms: Microsoft Copilot and Salesforce Agentforce. What followed was a rigorous two months of head to head AI testing and evaluation conducted inside a full copy enterprise sandbox.

### BY THE NUMBERS: OUR EVALUATION AT A GLANCE



## The Situation: Pursuing AI-Enabled Sales

Enterprises across every sector are racing to embed AI into their sales workflows. But the gap between AI ambition and AI results has led to frustration and ballooning expense. Pilots stall while adoption and ROI fail to really materialize.

In this case, leadership understood that tool selection alone would not determine success. How the tool was evaluated, activated, and adopted would. They needed a partner with deep Salesforce expertise and a proven adoption methodology for enterprise-scale change management.

JPW Consulting brought **25 years of enterprise Salesforce training and adoption experience** to the engagement, designing a structured evaluation framework that went far beyond feature comparisons. The goal: determine which platform would deliver real, sustained productivity gains for sellers in the field.

## Why Agentforce Was Chosen: Evidence Over Assumptions

The decision to recommend Agentforce was not made lightly. It was the product of six months of hands-on testing, dozens of rounds of carefully tested prompts, and continuous feedback loops with sellers, managers, and IT stakeholders. Here is what the evidence revealed.

### Native Salesforce Integration

Agentforce operates directly inside Salesforce, eliminating context-switching and keeping sellers in their primary workspace. During testing, this native integration consistently reduced friction and accelerated task completion versus Copilot's external integration model.

### Superior Seller Experience

Across 1,000+ test prompts, Agentforce delivered more contextually relevant, actionable outputs. Ease of use, and onboarding times were measurably shorter—a critical factor for global rollout.

### Real-Time Adoption Visibility

Built-in analytics gave leadership clear, real-time dashboards on who was using the tool, how often, and where engagement dropped off enabling proactive intervention rather than reactive troubleshooting.

### Responsive Product-Team Support

Salesforce's Agentforce team provided direct access to product engineers during the pilot, enabling rapid issue resolution and co-development of enterprise-specific configurations and product bugs.

### Enterprise-Grade Security and Scalability

Agentforce met stringent requirements for data security, role-based access, and multi-region deployment—critical for a global organization managing sensitive sales data.

### Operational Fit for Complex Workflows

The platform aligned closely with existing sales processes and CRM customizations, reducing the need for costly re-engineering and enabling faster time-to-value.

## What Enterprises Underestimate About AI Adoption

Our testing and deployment work revealed a consistent pattern: most enterprises dramatically underestimate what it takes to move from AI pilot to AI productivity. ***The technology works. The gap is in activation.***

### 1. Activation Must Precede Adoption

Turning on a tool is not the same as activating it. Before sellers will adopt AI, they need to understand why it matters, see it work in their context, and trust the outputs. JPW's approach front-loads enablement and stakeholder alignment before any licenses are deployed.

### 2. Rigorous Testing Is Non-Negotiable

Our 1,000+ prompt testing protocol is designed to stress-test AI outputs against real-world sales scenarios. This is not checkbox testing, but rather it is systematic validation across use cases, geographies, and data conditions. Without this rigor, organizations risk deploying tools that underperform in production or produce erroneous results.

### 3. Business-Context Mapping Drives Relevance

AI tools are only as useful as their contextual awareness. JPW maps each deployment to the client's specific sales processes, deal stages, and business specific terminology ensuring that AI outputs are not generic but make sense in the context of the sales organization.

### 4. Data and Semantic Alignment Is Foundational

Inconsistent data, misaligned field labels, and poor CRM hygiene are the silent killers of AI adoption. JPW's data preparation process ensures that the AI has clean, consistent inputs, which directly translates to higher-quality outputs. \*DataCloud (Data 360) accelerates and simplifies the process and quality of the agent's responses.

### 5. Governance and Support Build Trust

Enterprise AI needs guardrails. JPW establishes clear governance frameworks, escalation paths, and ongoing support structures that give leadership confidence and give sellers a safety net.

### 6. Production-Readiness Requires Planning

Moving from pilot to production at enterprise scale requires careful capacity planning, change management, and communication. JPW's phased rollout model minimizes disruption while maximizing adoption velocity and accuracy.

## The JPW Activation Model

Built on 25 years of enterprise Salesforce deployments, the JPW Activation Model is a proven, repeatable framework for taking AI tools from purchase to productivity. It is specifically designed for the complexities of enterprise sales organizations and has been refined through real-world engagements with global teams.

PHASE	DESCRIPTION
<b>Stakeholder Alignment</b>	Secure executive sponsorship, align IT and sales leadership on objectives, success metrics, and governance. Establish clear ownership and communication cadence across all stakeholder groups.
<b>Business Process Integration</b>	Map AI capabilities to existing sales workflows, deal stages, and CRM configurations. Identify high-impact use cases and design the integration to fit how sellers actually work.
<b>Data Preparation</b>	Audit, cleanse, and harmonize CRM data. Align and define field labels, resolve inconsistencies, and ensure the AI platform has clean, contextual inputs to generate actionable outputs.
<b>Pilot Execution</b>	Launch controlled pilots with defined cohorts, clear success metrics, and real-time feedback loops. Extensive rounds of test prompts to validate performance before expanding is critical.
<b>Scaled Rollout</b>	Expand adoption based on pilot results. Deploy phased training, enable super-users, and provide ongoing support with continuous iteration based on usage analytics.

## Conclusion

Successful enterprise AI adoption demands more than selecting the right tool. It requires rigorous evaluation, methodical activation, and sustained support. **The organizations that win with Agentforce will be the ones that invest in the process, not just the platform.**

JPW Consulting's track record is not just a case study. It is a repeatable methodology available to your accounts today.

When you are ready to move to pilot or into production with Agentforce, JPW is the activation partner that ensures they get there.