

Agentforce-powered internal sales intelligence transformation

ProcessBarron sales leadership faced growing operational drag from manual CRM administration, fragmented data sources, and limited real-time visibility into pipeline health and installed-base performance. Sales and service teams spent disproportionate time updating records, chasing context across systems, and reacting to issues too late—directly impacting velocity, data quality, and customer experience.

ProcessBarron prioritized an internal AI agent capable of executing routine tasks, surfacing actionable insights, and consolidating operational intelligence across Salesforce, SharePoint, and CrewConX. The objective was to reduce administrative overhead, improve decision-making speed, and establish a single conversational interface for sales and service productivity.



CHALLENGES

CRM administration inefficiency: Routine record creation and updates were heavily manual. This increased the risk of incomplete records, inconsistent data standards, and downstream reporting inaccuracies that weakened pipeline confidence and executive visibility.

Pipeline stagnation and deal risk: Stale opportunities were difficult to detect and diagnose at scale. Deals lingered in incorrect stages with outdated close dates, missing ownership, and unassigned follow-ups, creating forecast distortion and limiting leadership's ability to intervene early.

Fragmented operational intelligence: Critical equipment, inspection, and maintenance data lived across SharePoint, Salesforce, and CrewConX with no unified access layer. This fragmentation limiting the ability to connect service history to revenue opportunities.

Reactive service planning and escalation: Teams struggled to anticipate service needs, escalate issues in a timely manner, or identify upsell opportunities, which put customer satisfaction, renewal confidence, and long-term account growth at risk.

SOLUTION

TELUS Digital implemented an internal Agentforce-powered employee agent integrated with Salesforce and Data 360 to automate CRM operations, deliver pipeline intelligence, and unify equipment and maintenance insights through conversational AI.

- Deployed Agentforce Employee Agent with multiple agent topics for case creation, contact and opportunity management, deal execution, and general CRM intelligence using Flows, Apex, and Prompt Templates
- Built advanced sales intelligence capabilities, including stale opportunity detection with automated summaries and prescriptive next-step recommendations
- Ingested equipment and maintenance data from SharePoint and CrewConX into Data 360 using Data Streams, DLOs, DMOs, and Data Graphs to enable real-time operational insights with source-level traceability

The outcomes of this project included:

Significantly reduced administrative burden for sales teams through conversational CRM automation

Improved pipeline hygiene and forecasting accuracy via proactive stale opportunity identification

Enabled faster, better-informed sales and service decisions with a unified view of equipment health and maintenance history

Strengthened customer engagement and upsell readiness through AI-driven insights and structured service planning