

AI & Agentforce on Salesforce

A plain-English guide to what it is, what it does, and how Evotize deploys it

Artificial intelligence is now built directly into Salesforce. This guide explains what that means for your business — without the technical jargon.

What is Agentforce?

Agentforce is Salesforce's AI agent platform. Think of an AI agent as a digital team member that can handle tasks, answer questions, and take actions — automatically, 24 hours a day, without needing a human to trigger it.

For example, an Agentforce agent can:

- Answer customer questions on your website or portal — instantly, at any hour
- Qualify new sales leads and book meetings without your sales team lifting a finger
- Follow up on open support cases and update customers on progress automatically
- Surface the right information to your team at the right moment during a customer call

What is Einstein AI?

Einstein AI is Salesforce's built-in intelligence layer. It analyses your CRM data and surfaces predictions, recommendations, and insights directly inside Salesforce — so your team acts on the right information at the right time.

Lead scoring Einstein scores your leads based on which ones are most likely to convert — so your sales team focuses on the right opportunities.

Opportunity insights Flags deals that are at risk and suggests actions to get them back on track.

Case classification Automatically routes incoming support cases to the right team based on content and priority.

Forecast accuracy Improves the reliability of your sales pipeline forecast using historical patterns.

Intelligent automation with Salesforce Flow

Not every automation needs AI — sometimes the smartest thing is a well-designed automated process that just runs reliably in the background. Salesforce Flow lets us build these automations visually, without complex code.

- Automatically send a welcome email sequence when a new customer is created
- Trigger a task for your account manager when a contract is due for renewal
- Update related records across your CRM when a deal status changes
- Escalate a support case automatically if it has not been responded to within SLA

How Evotize deploys AI for your business

We take a practical approach to AI. We start by understanding your biggest time drains and bottlenecks, then identify where AI can have the most immediate impact — rather than deploying technology for its own sake.

- 1. Understand your workflows** We map out where your team spends time on repetitive, manual tasks.
- 2. Identify the right AI tools** We match Salesforce's AI capabilities to your specific use cases.
- 3. Build and configure** We set up agents, predictions, and automations — tested and tuned for your data.
- 4. Train your team** We make sure your people know how to work alongside the AI tools, not around them.
- 5. Measure and improve** We track the impact and refine the setup as your business evolves.

Is AI on Salesforce right for your business?

You do not need to be a large enterprise to benefit from AI on Salesforce. If any of the following sound familiar, it is worth a conversation:

- Your sales team spends too much time on admin instead of selling
- Customer queries pile up outside business hours with no coverage
- Your pipeline forecast is unreliable and hard to trust
- Leads come in but too many go cold before anyone follows up
- Your support team handles the same types of queries repeatedly

Ready to explore AI for your Salesforce?

Get in touch with Evotize for a free 30-minute consultation. We will walk through your current Salesforce setup and identify where AI can have the most immediate impact.

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