

# Salesforce and AI Implementation Experts

Agentforce Powered | AI + Data Driven



## Infoglen at a Glance



**10+** Years of Salesforce Expertise

Headquartered in San Jose, CA

**150+** Experts across US, Canada, UAE & India

**360+** Certifications

**200+** Projects Completed

**90%** Repeat Business

**4.9/5** CSAT

**35+** AI/Agentforce Certified Experts

Dedicated AI Centre of Excellence

## Our Core Salesforce Competencies



Sales Cloud



Service Cloud



Revenue Cloud



Experience Cloud



Marketing Cloud



Health Cloud



Government Cloud



Financial Services Cloud






Custom Solution

## Our Agentic AI Offerings

<p>Capability</p> <p><b>Agentforce implementation</b> Certified partner with deep multi-cloud knowledge and proven deployment playbooks.</p>	<p>Capability</p> <p><b>Agentic AI architecture &amp; roadmap</b> End-to-end CIO roadmap: Salesforce + non-SF agents, vector DB, RAG, knowledge graph &amp; LLM.</p>	<p>Capability</p> <p><b>AI governance &amp; observability</b> Oversight frameworks for AI decisions, adoption tracking and ROI measurement.</p>
<p>Solution</p> <p><b>Engagement agent</b> AI-generated prospect emails - personalized by vertical, history &amp; past opportunities.</p>	<p>Solution</p> <p><b>Meeting agent</b> Ingests call transcripts into Salesforce, auto-generates follow-up emails and action items.</p>	<p>Solution</p> <p><b>Proposal generation agent</b> Pulls from prior decks, emails, CRM data and meeting notes to create near-complete proposals.</p>
<p>Solution</p> <p><b>Inbound lead agent</b> Responds to inbound emails, qualifies prospects and books meetings - fully autonomous.</p>	<p>Solution</p> <p><b>Voice agent</b> Handles inbound voice calls end-to-end. One of very few partners pioneering this capability.</p>	<p>Solution</p> <p><b>Data agent</b> AI-driven data cleaning, enrichment and segmentation - faster and higher quality.</p>
<p>Solution</p> <p><b>Pipeline &amp; account intelligence</b> 360 degree intelligence on every opportunity and account with white-space identification.</p>	<p>Capability</p> <p><b>AI GTM enablement</b> Strategic C-suite offering: AI roadmap design, technology choices and revenue modeling.</p>	<p>Capability</p> <p><b>Data Cloud for Agentforce</b> Data unification, harmonization and enterprise pipelines as the foundation for agents.</p>

## Expanded AI Offerings

 <p><b>PREDICTIVE AI</b> Churn &amp; donor growth models Production-ready models for attrition risk and donor growth - battle-tested and ready for GTM.</p>	 <p><b>GENERATIVE AI</b> MCP + Claude Code - AI building AI Pioneering MCP servers and Claude Code to build and test agents faster with higher quality output.</p>	 <p><b>DATA READINESS</b> Enterprise data foundations Data Cloud integration frameworks ensure agents run on clean, trusted, real-time data from day one.</p>
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## Industry Expertise

 <p>High-Tech &amp; SaaS</p>	 <p>Cybersecurity</p>	 <p>Financial Services</p>
 <p>Healthcare &amp; Life Sciences</p>	 <p>Construction &amp; Real Estate</p>	 <p>Nonprofits</p>

## Our Engagement Models

Engagement Type	Best For	What You Get
Advisory & Strategy	Teams planning Salesforce or AI initiatives	Clear roadmap, architecture guidance, and risk reduction
Implementation & Transformation	New builds, migrations or major enhancements	Scalable Salesforce solutions designed for adoption
Accelerator-Led Quick Starts	Fast value with minimal disruption	Prebuilt agents and accelerators deployed in weeks
Managed Services	Continuous improvement post go-live	Ongoing enhancements, AI tuning, and adoption support

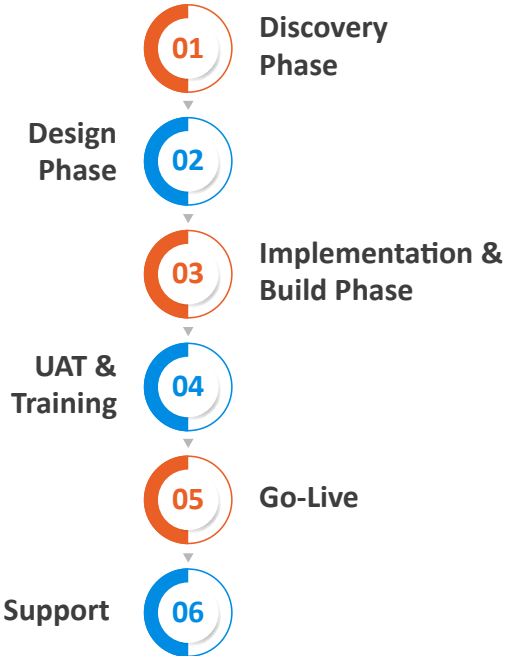
## Fast, Focused Salesforce Delivery

*Designed to minimize delays and maximize real business impact.*

### Delivery Methodology (Built for Programs of Any Scale)

- Proven delivery models suited for both focused Salesforce rollouts and complex enterprise programs
- Proven experience managing multi-cloud, multi-team and phased implementations
- Governance-led execution for complex, multi-workstream programs

A proven delivery model, validated across **200+ Salesforce implementation projects**, focused on speed, clarity and adoption.



## Top Clients That Trust Infoglen



AND MANY MORE...