

Case Study: Agentforce BDR for Multi Division Organization

Scout - Accelerating Lead Qualification with AI

What if 7 days became 30 minutes? See how we made it possible with AI.



The Challenge: our client receives more than 2,500+ inbound inquiries on our client products and services (Leads) each year through website forms.

The problem? The process was entirely manual.

That meant:

- reviewing every submission
- researching the individual and their company
- determining fit and qualification
- assigning the right sales representative
- following up to fill in missing details

With this volume, turnaround time averaged: 7 days per lead

⚠ Why this matters

Speed matters more than most people realize.

Research from *Harvard Business Review* and *MIT* shows that response time has a direct impact on conversion. Companies that respond within 5 minutes are 100x more likely to connect, while after 24 hours, conversion rates drop close to zero.

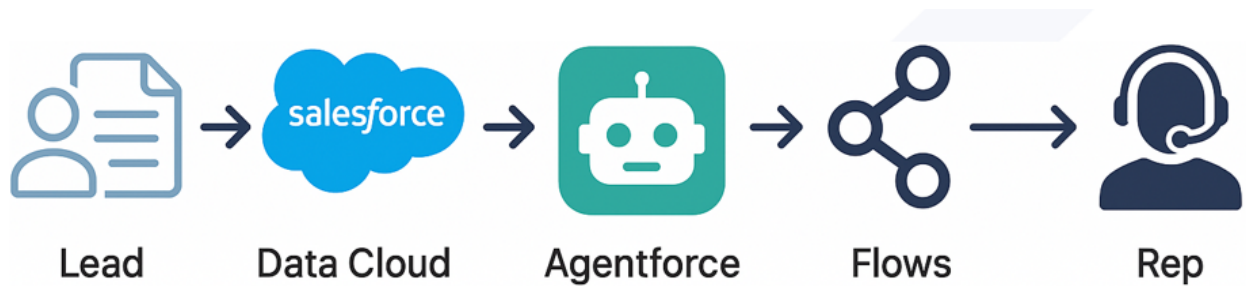
At a 7-day response time, most opportunities are lost before a conversation even begins.

The Solution

The solution uses Agentforce, the agentic layer of Salesforce, to create an AI agent known at our client as Scout.

Salesforce stores data for leads, opportunities, accounts, sales reps, and more. Scout can access this data through workflows and leverage AI (via LLMs such as ChatGPT) to intelligently perform actions.

Lead data is submitted via website intake forms and lands in Salesforce. Scout then takes over, automating manual steps and assigning the lead to the correct Sales Rep.



How it works

- Lead data is submitted through website forms
- Data flows directly into Salesforce
- Scout takes over

The AI agent can:

- read and interpret the submission
- research the individual and company
- identify missing information
- follow up automatically via email
- qualify or disqualify leads
- assign the correct our client Sales Representative

All gathered data (research, company/person insights, and email conversations) is captured and visible to the Sales Rep within the Salesforce lead record.

What's changed

Before

- Manual review and research
- Email back-and-forth for missing details
- Delayed assignment to sales
- Limited visibility

After

- Automated intake and research
 - AI-driven follow-up
 - Intelligent assignment
 - Full visibility in one place
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The impact

Response time improved from:

7 days → ~30 minutes

This shift:

- dramatically increases the likelihood of engagement
 - improves speed to first response
 - enables sales teams to focus on qualified opportunities
 - reduces manual workload
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What this means for our client

This is a clear example of how AI can:

- remove operational bottlenecks
- accelerate time-to-action



- improve conversion potential
- scale processes without adding manual effort

It's not just faster—it's a better way to operate.

And a win/win for our client and the new business!

Detailed view of the Scout's workflow



Source: Scout process design | Routing decisions executed autonomously in real time | Human review for Commercial Leaders to review DQs

Call us if you'd like to improve your sales motion.

InsiteLoop

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