

Service Cloud QuickStart

AI-Powered Customer Service with Agentforce & Trusted Data

Datacolor.ai is a **Salesforce Select Partner** and **Informatica Platinum Partner** specializing in enterprise-grade Customer Data Management and AI-driven CRM implementations. We are pleased to present this letter outlining our **Service Cloud QuickStart** offering — a structured engagement designed to activate Agentforce AI agents from day one, automating case classification, resolution, and escalation while grounding every agent on Informatica-cleansed customer data. The result is faster resolution times, higher CSAT scores, and service teams freed from repetitive work.

What's Included — Core Scope

Consultation & Discovery

- Requirements discovery workshops and service process analysis
- Case lifecycle and escalation pathway mapping
- Agentforce use-case identification for case deflection and routing
- Data quality baseline for Contact and Case records
- Success KPIs and SLA benchmark definition

Salesforce Configuration

- Lead, Account, Contact, Case, Activities, Assets setup
- Web-to-Case, Email-to-Case, Case Assignment & Escalation Rules
- Case Queues, Omni-Channel routing, Service Console configuration
- User Roles, Profiles, Sharing Rules, Permission Sets
- Flows (up to 10), Reports (up to 15), Dashboards (up to 5)

Agentforce Service Agents

- Agentforce Service Agent — AI-powered case resolution with knowledge base grounding
- Case Classification Agent — auto-routing cases using AI
- Einstein Case Wrap-Up — AI-generated case summaries
- Sentiment-Driven Escalation Agent — real-time CSAT risk detection
- Agent grounding via Salesforce Data Cloud unified customer profiles

Informatica Data Quality

- Pre-migration data profiling for Contact, Case, and Asset records
- Duplicate contact detection and master record consolidation
- Ongoing data quality monitoring dashboard
- Salesforce Connector for Informatica IDMC SaaS — co-developed by Datacolor

Data Migration

- Standard: Account, Contact, Case, Activities — up to 4 objects, no cleansing
- Premium: +Asset object, up to 5 record types, 1 additional object migration
- Client-cleansed data required prior to kickoff

Resources & Enablement

- Senior BA / Project Manager
- Salesforce Service Cloud Certified Solutions Architect
- Agentforce Implementation Specialist
- Training & Enablement (4 hrs Standard / 8 hrs Premium)
- 4-week post-go-live hypercare support included

Engagement Tiers

Feature	STANDARD — 3–4 Weeks	PREMIUM — 6–8 Weeks
Core Objects	Account, Contact, Case, Activities	All Standard + Asset + up to 2 Custom Objects
Record Types / Custom Fields	Up to 5 Record Types / 10 Custom Fields	Up to 5 Record Types / 10 Custom Fields per object
Case Rules & Queues	Assignment, Escalation & Queues (5 each)	All Standard + 2 additional rules each
Flows	Up to 5 (max 10 steps each)	Up to 10 (max 10 steps each)
Dashboards	2 Dashboards (5 components each)	5 Dashboards (up to 10 components each)
Omni-Channel Routing	—	✓ Included
Agentforce Agents	Case Classification Agent	Case Classification + Sentiment Escalation + Case Wrap-Up + Service Agent
Informatica Data Quality	—	✓ Profiling & quality dashboard
Data Migration	4 objects	5 objects (+Asset)
User Training	4 hours	8 hours
Hypercare Support	4 weeks post go-live	4 weeks post go-live
Price	\$9K–\$12K	\$14K–\$19K

Key Benefits

 **Agentforce Service Agents** — Case Classification, Resolution, Wrap-Up, and Sentiment Escalation agents — all configured in-scope, not add-ons.

 **Rapid Deployment** — Production-ready in 3–8 weeks with pre-built Service Cloud accelerators.

 **Data-Grounded AI** — Informatica Platinum Partner expertise ensures agents act on accurate, unified customer profiles.

 **Measurable Impact** — 60% improvement in data quality and 3× faster time-to-value proven across engagements.

 **Clear Scope & Budget** — Fixed deliverables per tier with 4-week hypercare included — no surprise overruns.

 **Omni-Channel Ready** — Premium tier includes Omni-Channel routing so cases reach the right agent instantly.

How It Works — Our Approach

01	02	03
Discovery & Assessment Service process analysis, case lifecycle mapping, Agentforce use-case selection, and data quality baseline.	Architecture & Design Service Cloud data model, Informatica pipeline design, Agentforce agent blueprints, and sandbox setup.	Configure & Build Full Service Cloud configuration, agent deployment, Omni-Channel setup, and migration execution.
04	05	
Test & Validate Internal QA, UAT sessions with client, agent demonstration, and data quality verification.	Go-Live & Hypercare Production deployment, training, and 4-week hypercare with email support and minor tweaks.	

Assumptions & Out of Scope

ASSUMPTIONS

- Client has cleansed source data prior to kickoff
- Refreshed Sandbox available at project start
- Requirements shared with Datacolor before kickoff
- Client SME available throughout engagement
- End-user training via Train the Trainer model
- Salesforce Service Cloud licenses provisioned

OUT OF SCOPE

- Custom Apex/LWC beyond specified scope
- Field Service Lightning (separate engagement)
- Chat/Messaging Channel setup (add-on available)
- Data cleansing by Datacolor
- ERP or billing integrations
- Change management programs

We welcome the opportunity to discuss how the Service Cloud QuickStart can be tailored to your organization's needs. Please do not hesitate to reach out to begin the conversation — we look forward to helping you transform your customer service operations with the power of AI.

The Datacolor.ai Team
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