

Sales Agent Activation - AGT504

OEM: Salesforce • Code: AGT504

COURSE DESCRIPTION

Learn how to support your sales team using Agentforce by setting up, configuring, and testing lead nurturing, pipeline management, and interactive sales coaching capabilities. In this 4-hour virtual workshop series (two 90-min sessions and one 60-min session) an Agentforce expert will guide you as you turn on, configure, and experiment with Agentforce Sales features. On Day 1, you will explore Agentforce setup considerations and configure lead engagement capabilities to scale customer outreach. On Day 2, we shift the focus to advancing opportunities and you'll turn on and test pipeline management capabilities. We'll wrap up Day 2 with setting up and practicing with the Sales Coach.

AUDIENCE PROFILE

- Administrators, consultants, developers, and architects who are interested in getting started with Agentforce Sales Agents.

PREREQUISITES

- This section doesn't contain any content.

COURSE OBJECTIVES

By the end of this course, participants will be able to:

- Describe how Agentforce supports your sales team.
- Set up and configure lead nurturing, pipeline management, and sales coaching capabilities.
- Review AI-generated outreach while testing in Agentforce Builder.
- Leverage pipeline management to review and act on agent-suggested actions to advance sales opportunities.
- Simulate and assess a variety of sales skills with interactive coaching scenarios.

COURSE OUTLINE

Module 1: Lead Nurturing

- Agentforce for Sales Landscape
- Automate Lead Outreach

- Considerations for Lead Nurturing

Module 2: Pipeline Management

- Implement Pipeline Capabilities
- Considerations for Pipeline Management

Module 3: Sales Coaching

- Simulate Sales Scenarios
- Considerations for Sales Coach