

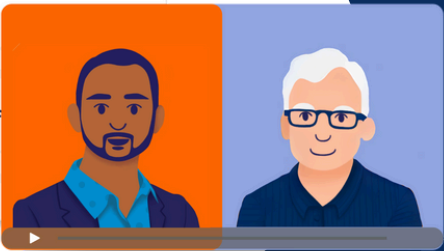


Summit Partner

Needs attention (1)

Next Steps

Questions f



Agent Pip
to Sam Bennett ▾

Hi Sam,
Thanks for attending [How to Develop a Sustainable Travel Programme](#). I would love to get your thoughts on the webinar. Are you free for a quick chat with Mira this week?

Kind Regards,
Mira's AI Agent

Sam Bennett
to Agent Pip ▾

I'm not free this week, but happy to have a chat on the 30th

Book a Call with Mira Li
Wednesday, September 30th

Salesforce AI Quick Start Packages

with Performa IT

Customer Chat

Thanks, is there any way then to amend order #74556 and change it to a mid-year planner rather than academic?

I unfortunately cannot amend an existing order, but I can cancel it and create a new one?

Yes, thank you - that would be perfect!

Here is a [link](#) with the new order for you to review!

Topic Label
Order Management

Classification Description
Use this topic if the customer wants to amend their existing order.

Scope
Your job is to amend existing orders if the product(s) haven't been shipped.

Instructions

Before cancelling or amending an order, get the customer's email if it has not already been provided.

If the order has been shipped, send Returns Email.



Einstein Replies

Hi Dion, The Orion Lodge is an excellent option for families. The hotel has family suites for up to five and plenty of amenities and activities for children such as a pirate ship splash pool! [Check out the details on our site](#). With your membership, we can offer you an additional 5% off if you book today!

Sourced from **Sales**

▸

Introduction & Contents

Salesforce provides customers with a wealth of tools to create their own 'digital workforce', allowing companies to scale their Sales, Service, Marketing, Commerce and Operational efforts whilst also elevating the customer experience.

Einstein - Salesforce Einstein is a collection of tools that leverage AI to help businesses analyse data, forecast trends, automate tasks, and produce generative content and insights.

Agentforce - Salesforce's rapidly expanding suite of autonomous, agentic AI agents. These agents have the power to act within the guardrails you set for them, carrying out tasks for your customers and your team. Your very own digital employee.

Data Cloud - The foundation for AI, Data Cloud is the layer of harmonised, unified data that your Agents, Einstein tools, flows or APEX leverage to serve your business.

This document outlines our base-level packages with pricing for up to 50 users, please get in touch to discuss your unique requirements and use cases and we will be able to produce a detailed quotation.

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Sales Development Agent

Agentforce

Deploy AI Agents as Sales Development Reps, supporting your existing Sales Team by qualifying and nurturing leads at scale.

From
£9,950*

SDR Agent Quick Start

Readiness Workshop

Collaborative workshop to define three key use cases.
Roadmap to implementation of the top priority use case.
Strategic planning.

Configuration

Implementation and activation of Agent.
Enable and provide user access.
Manage and configure settings.

Custom Actions

Setup of **up to 5** additional custom actions for your business use cases:

- Create custom actions using flow, prompt template or Apex.
- Add custom actions to the Agent Builder.

Testing

Test and activate the custom actions.

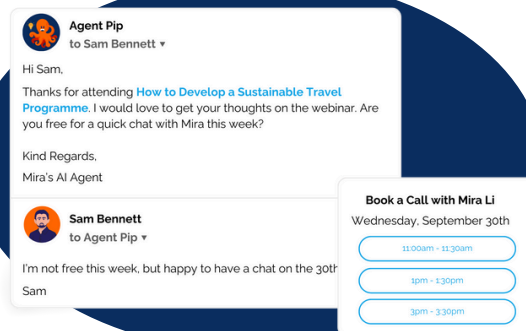
Please note that we will require participation from the relevant team members to ensure that the Agent is producing the desired outputs.

Training & Support

Comprehensive training for users.
30 day hyper-care support.
Subscription to Agent Performance Review Programme.

*excl. VAT

CONTACT US



Customer Service Agent

Agentforce

Serve and support your customers 24/7. To implement an effective Service Agent, at least 100 Knowledge Articles are required for setup. For customer-facing agents, Messaging for In-App and Web Setup is required.

From
£9,950*

Service Agent Quick Start

Readiness Workshop

Collaborative workshop to define three priority use cases.
Roadmap to implementation of the top priority use case.
Strategic planning.

Configuration

Implementation and activation of Agent.
Enable and provide user access.
Manage and configure settings.
Routing configuration (escalation).
Embedded deployment setup (add to channel).

Custom Actions

Setup of **up to 5** additional custom actions for your business use cases:

- Create custom actions using flow, prompt template or Apex.
- Add custom actions to the Agent Builder.

Testing

Test and activate the custom actions.

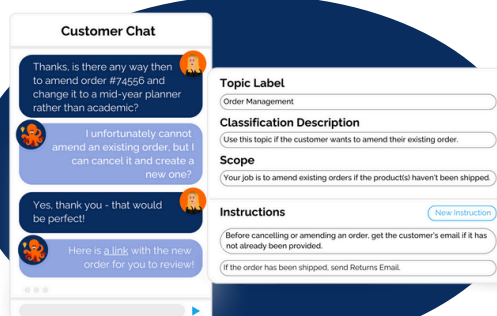
Please note that we will require participation from the relevant team members to ensure that the Agent is producing the desired outputs.

Training & Support

Comprehensive training for all users.
30 day hyper-care support.
Subscription to Agent Performance Review Programme.

*excl. VAT

CONTACT US



Marketing Agent (Campaigns)

Agentforce

Create engaging, personalised and thoughtful campaigns quicker than ever before. Build campaigns, briefs, and assets with a single prompt. Automate processes and deliver new heights of personalisation to delight your customers.

From
£9,950*

Marketing Agent Quick Start

Readiness Workshop

Collaborative workshop to define goals, audience segmentation and automation needs.
Roadmap to implementation.
Strategic planning.

Configuration

Implementation and activation of Agent.
Enable and provide user access.
Manage and configure settings.
Integrate with Marketing Cloud or Account Engagement.

Custom Actions

Setup of **up to 5** additional custom workflows for your business use cases:

- Create custom actions using flow, prompt template or Apex.
- Add custom actions to the Agent Builder.

Testing

Test and activate the custom actions.

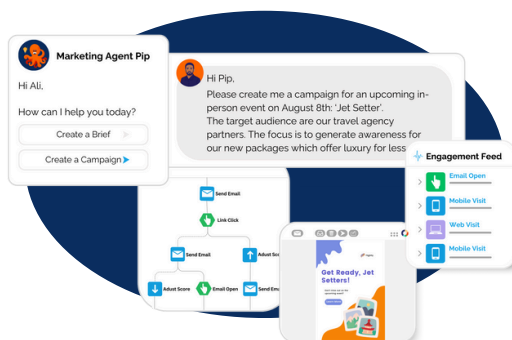
Please note that we will require participation from the relevant team members to ensure that the Agent is producing the desired outputs.

Training & Support

Train marketing teams on AI-driven campaign execution and performance tracking.
30 day hyper-care support.
Subscription to Agent Performance Review Programme.

*excl. VAT

[CONTACT US](#)



Internal Agent (Custom)

Agentforce

Employ Agentforce to support your internal team, gathering information, presenting insights, completing tasks and levelling-up their productivity.

From
£9,950*

Internal Agent Quick Start

Readiness Workshop

Collaborative workshop to define three priority use cases.
Roadmap to implementation of the top priority use case.
Strategic planning.

Configuration

Implementation and activation of Agent.
Enable and provide user access.
Manage and configure settings.

Custom Actions

Setup of **up to 5** additional custom actions for your business use cases:

- Create custom actions using flow, prompt template or Apex.
- Add custom actions to the Agent Builder.

Testing

Test and activate the custom actions.

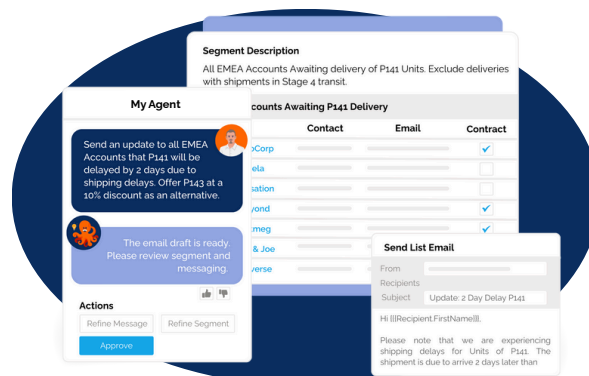
Please note that we will require participation from the relevant team members to ensure that the Agent is producing the desired outputs.

Training & Support

Comprehensive training for all users.
30 day hyper-care support.
Subscription to Agent Performance Review Programme.

*excl. VAT

[CONTACT US](#)



Field Service Agent

Agentforce

Implement a digital dispatcher to handle inbound customer requests, manage and schedule field service appointments and communicate with technicians.

From
£9,950*

Field Service Quick Start

Readiness Workshop

Collaborative workshop to define three priority use cases.
Roadmap to implementation of the top priority use case.
Strategic planning.

Configuration

Implementation and activation of Agent.
Implement scheduling and appointment amendments.
Enable and provide user access.
Manage and configure settings.

Custom Actions

Setup of **up to 5** additional custom actions for your business use cases:

- Create custom actions using flow, prompt template or Apex.
- Add custom actions to the Agent Builder.

Testing

Test and activate the custom actions.

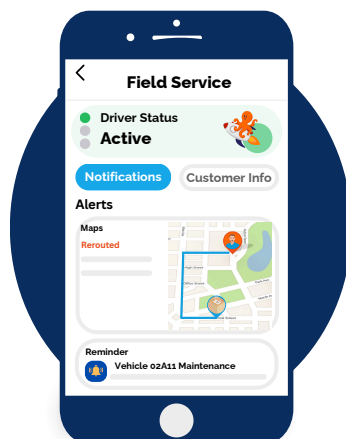
Please note that we will require participation from the relevant team members to ensure that the Agent is producing the desired outputs.

Training & Support

Comprehensive training for all users.
30 day hyper-care support.
Subscription to Agent Performance Review Programme.

*excl. VAT

[CONTACT US](#)



Slack Agent

Agentforce

Seamlessly integrate AI-powered support into Slack for your teams, providing each and every employee with their own digital personal assistant.

From
£9,950*

Slack Agent Quick Start

Readiness Workshop

Collaborative workshop to define internal requirements.
Define workflows, and finalise **3** key use cases.
Roadmap to implementation.

Configuration

Implementation and activation of Agent.
Integrate with **up to 3** workspace applications.
Enable and Provide user access.
Manage and configure settings:

- Configure AI responses
- Set up knowledge retrieval
- Personalise interactions

Custom Actions

Setup of **up to 5** additional custom actions for your communications use cases:

- Create custom actions using flow, prompt template or Apex.
- Add custom actions to the Agent Builder.

Testing

Test and activate the custom actions.

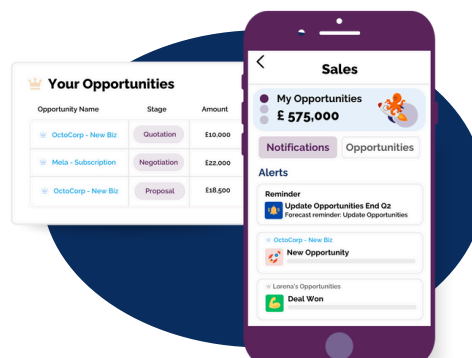
Please note that we will require participation from the relevant team members to ensure that the Agent is producing the desired outputs.

Training & Support

Comprehensive training for all users to optimise collaboration.
30 day hyper-care support.
Subscription to Agent Performance Review Programme.

*excl. VAT

[CONTACT US](#)



Einstein AI for Sales

Increase Your Pipeline Visibility

Eliminate data entry, automate follow-ups and summaries, invest your time where it matters most. Add Einstein to your team and free up their time to win more customers.

£7000*
for all AI Sales features

Einstein Lead Scoring

Use AI to analyse historical data and automatically score leads based on their likelihood to convert.

£1000*

Einstein Opportunity Scoring & Insights

Assign scores to sales opportunities based on AI analysis of patterns from past deals, identifying which opportunities are most likely to close and therefore require prioritised attention. Additionally, provide your team with AI-driven recommendations on the next steps to take for an opportunity, such as when to follow up or if a deal might be at risk.

£1500*

Activity Capture

Automatically log emails and calendar events to Salesforce, eliminating the need for manual data entry and keeping customer data up-to-date.

£1500*

Einstein Forecasting

Leverage Einstein to analyse historical sales data and forecast future sales performance, helping SMBs make more informed decisions and improve forecast accuracy.

£1500*

Call Coaching

Enlist Einstein to analyse sales calls and provide AI-driven insights into conversation patterns, sentiment, and performance - helping reps improve their technique.

£1500*

Einstein Sales Cloud Analytics & Insights

Analyse sales data and customer interactions to deliver actionable reminders and insights directly to Sales Reps, enabling them to prioritise tasks and take timely actions for more proactive and effective sales management. Access custom reports and predictive analytics by generated from sales data, empowering sales leaders with deep visibility to make data-driven decisions and optimise performance for better forecasting and execution.

£1000*

*excl. VAT

Einstein AI for Service

Scale Your Service

Implement Einstein AI for your Service Team to help them solve cases faster, freeing up their time for the more complex, priority queries and improving your customer experience.

£7500*
for all AI Service features

Einstein Case Classification

Automatically classify and assign incoming customer cases based on past data, improving response times and case routing.

£1500*

Next Best Action

Provide your Service Agents with intuitive, instant recommendations for the next best action or solution based on customer history, behaviours and current issues.

£2500*

Article Recommendations

Suggest relevant knowledge-base articles for both customers and agents based on the context of a case or query.

£1000*

Reply Recommendations

Give your Service Agents access to intelligently crafted responses for common customer queries, helping agents reply faster and more consistently.

£1000*

Case Wrap-Up

Help agents close cases faster by automating the process of summarising case resolutions.

£1000*

Conversation Mining

Leverage Natural Language Processing (NLP) to identify the most common types of interactions with customers and recommend how to optimise their processes, self-service channels, and knowledge base.

£1000*

Service Analytics

Provide your team with actionable insights into customer service performance, agent productivity and customer satisfaction.

£1000*

*excl. VAT

Data Cloud

Lay the Foundation for Agentforce

Unlock real-time, AI-driven customer insights by unifying data from multiple sources, enabling you to deliver hyper-personalised experiences, optimise decision-making, and drive smarter automation at scale.

From
£15,000*

Data Cloud Quick Start

Readiness Workshop

Collaborative workshop to define data strategy.
Roadmap to implementation (guidance on data readiness).
Strategic planning.

Configuration

Connection of **2-3** critical data sources, including legacy systems.
Advanced identity resolution for a limited subset of customer records.
Creation of **5-10** tailored data segments.
Creation of **up to 10** customised dashboards for reporting on key metrics.

Governance & Security

Establishment of data governance framework for initial data sets.
Integration with enterprise security protocols and access controls.

Testing

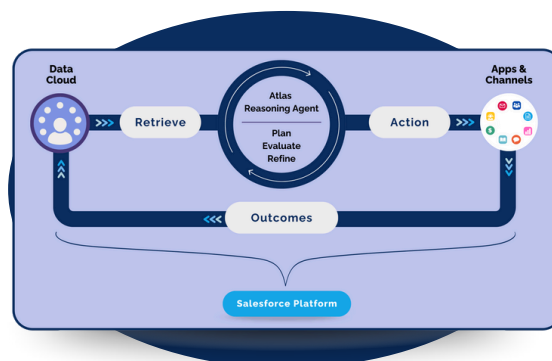
Thorough testing of data integrations and solution.

Training

Comprehensive training for users.

*excl. VAT

[CONTACT US](#)



Customer Testimonial - Agentforce and Einstein

"I would recommend Performa IT as a partner because of the people. It's very easy to work with [Performa IT]; people come from different backgrounds and different experiences with different skills, and everyone is willing to work as one team. So I have to say, I never felt the difference as, although we're from two different companies, when we're working on one project, we are in it together. The majority of the time, I don't have to explain myself too much, you just get it ... and that is not easy to find in my experience."

- Laura Meschi, Customer Experience Manager at Secret Escapes

Why Performa IT?

400+
Projects



130+
Certifications

30+
Industries

81%

Conversion Increase

with Sales Cloud

37%

Cost Reduction

with Service Cloud

75%

Efficiency Increase

with Exp. Cloud

25%

Productivity Increase

with Field Service

50%

Efficiency Increase

with MuleSoft

Agentforce and Einstein Solutions.

£150k

Est. Annual Saving

secret Escapes

45%

AI Case Deflection



