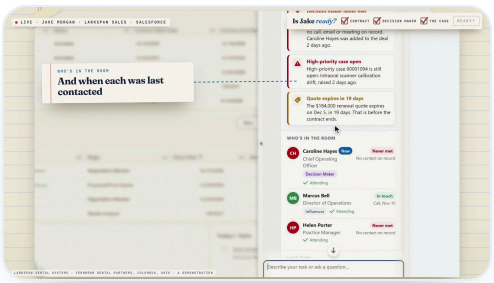
SALES AND REVENUE · AGENTFORCE EMPLOYEE AGENT

Meeting Prep Brief Agent

Ready isn't a feeling anymore. It's on the record.

The Meeting Prep Brief Agent works in the Agentforce panel in Salesforce. The rep asks in one sentence; the agent finds the meeting on the rep's own calendar and reads the account from Salesforce: the renewal, the contract, the quote, the cases, and every call and meeting with the people attending. It answers with what to watch for first, a brief card for the rest, and a prep task on a yes. The sales manager sees the same brief on the account.



2	4	173	497	92%
SUBAGENTS	ACTIONS	COMPONENTS	APEX TESTS	CODE COVERAGE

WHAT IT DOES

Finds the meeting
From one sentence: today, tomorrow, a weekday or the account name, on the rep's own calendar.

Reads the account
The renewal, the contract, the quote, the cases, and every call and meeting with the people attending.

Risks first
A contract ending, a decision maker never met or gone quiet, an open high-priority case, a quote expiring first, an overdue follow-up.

The brief card
Who is in the room, the last contact, the deal, open cases and follow-ups; every line opens its record.

A prep task on a yes
On the rep's task list with the points to cover, and follow-up questions answered from the brief.

The same brief on the account
The Meeting Prep panel shows it live for the manager, with every brief already prepared.

THE RULES IT FOLLOWS

- **From the records**
  Every fact comes from Salesforce and is shown as stored, never guessed or rounded.
- **Only your own meetings**
  It reads each person's own meetings, with their own Salesforce access.
- **Never changes a deal**
  It reads the deal, the contract and the quote; it never edits them.
- **Never writes to the customer**
  No emails, no messages: the brief is for your team only.

PROVEN IN A LIVE RUN

One sentence. Today, tomorrow, a weekday or the account name.

Risks first. A contract ending, a decision maker never met, an open high-priority case.

From the records. Every fact from Salesforce, never guessed or rounded.

WORKS WITH
Works with your team

WHERE IT WORKS
Salesforce

RUNS ON
Agentforce, Salesforce Sales Cloud, Lightning Experience

BEST FOR
Account executives, account managers, sales managers, customer success managers, renewal teams and sales development reps

INDUSTRIES
B2B equipment and technology, Healthcare and dental suppliers, Professional services, Software and SaaS, Manufacturing and distribution, Financial services and insurance

WHAT YOU NEED

- ✓ **Sales Cloud**
  Accounts, opportunities with contact roles, contracts and quotes in Salesforce.
- ✓ **Agentforce**
  Agentforce for employees, in Lightning Experience.
- ✓ **Logged activity**
  Meetings as events, and calls and notes on the account.
- ✓ **Cases (optional)**
  Open cases appear in the brief when you log them in Salesforce.

Live. Recorded on a real Salesforce org and last validated Nov 17, 2026.

Free scoping: a 60-minute review with an architect.

We map it to your org, your rules and your data, and give you a fixed plan before work starts.

salesforce PARTNER