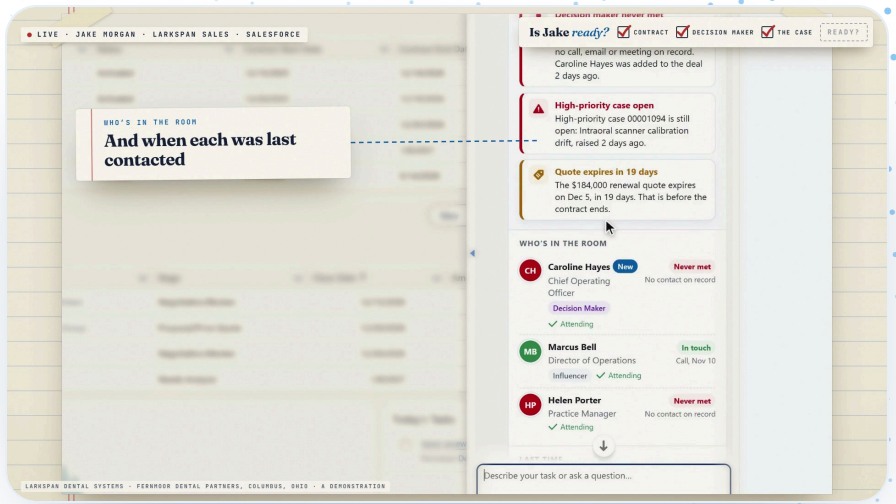
SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · SALES AND REVENUE · NOVEMBER 2026

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

Meeting Prep Brief Agent. It 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.



STATUS
LIVE DEMO

WORKS WITH
Works with your team

WHERE IT WORKS
Salesforce

CONTACT
contact@synconai.com

salesforce PARTNER

THE PROBLEM

Is the rep ready? Nobody knows until the meeting.

Tomorrow's meeting is the biggest renewal on the board. The answer to "is the rep ready?" is spread across Salesforce, and finding it means clicking through the account tab by tab. The manager finds out by asking; the rep finds out by clicking, if there is time.

- **The contract, on one tab**
- **The quote, on another**
- **The cases, somewhere else**
- **The people, and who was last in touch, in between**

THE COST Everything is already in Salesforce. Nobody has put it together.

WHAT IT DOES

Everything the Meeting Prep Brief Agent handles.

01

Finds the meeting

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

02

Reads the account

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

03

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.

04

The brief card

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

05

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.

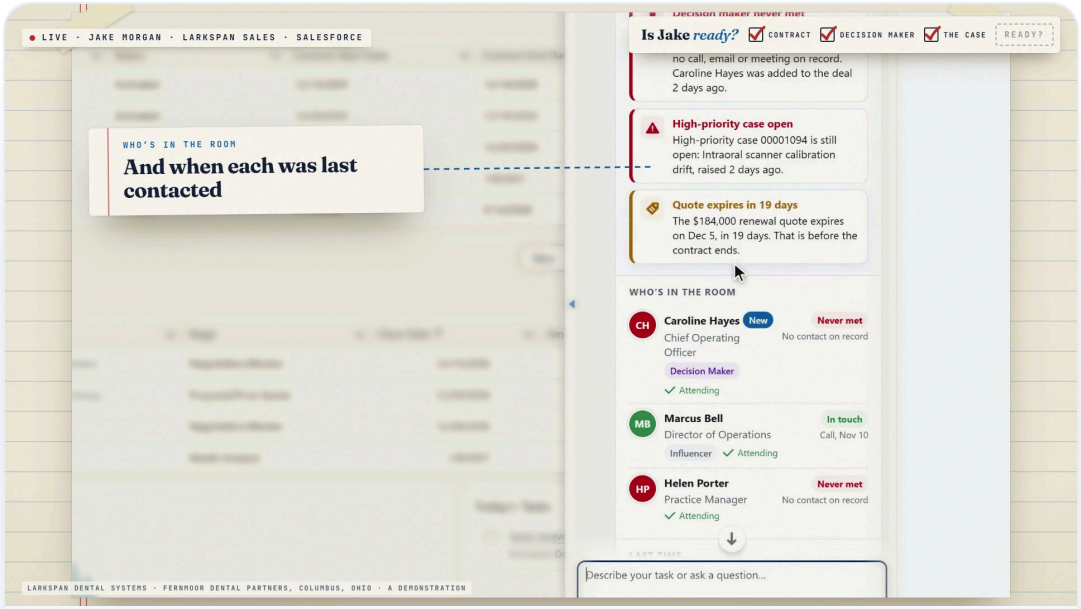
06

The same brief on the account

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

PROOF

Recorded live on a real Salesforce org.



Watch the full run (2:50) at synconai.com/ai-agents/meeting-prep-brief-agent

- **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.
- **The manager sees it.** The same brief, live on the account.

THE BRIEF
Read from Salesforce, in seconds.

THE PREP TASK
On his task list, with the points to cover.

ONE MORE QUESTION
Answered from the brief.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 **From the records**
Every fact comes from Salesforce and is shown as stored, never guessed or rounded.

02 **Only your own meetings**
It reads each person's own meetings, with their own Salesforce access.

03 **Never changes a deal**
It reads the deal, the contract and the quote; it never edits them.

04 **Never writes to the customer**
No emails, no messages: the brief is for your team only.

05 **Writes only on a yes**
A log of each brief, and a prep task only when the rep asks for one.

TESTED BY REPLAY Real conversations replayed in Agentforce testing before every release: finding the meeting by day or name, the brief, the prep task, follow-up questions and requests it should not take on.

THE DIFFERENCE

A report lists records. This agent reads the account for the meeting.

WHEN	CLICKING THROUGH THE ACCOUNT	THIS AGENT
A meeting is tomorrow	Open the account and every tab, if there is time	**One sentence, and the brief comes back**
The decision maker changed	Found in someone's call notes, if anyone reads them	**Flagged: decision maker never met**
The contract ends soon	On the contract tab	**First on the list, with the days left**
A high-priority case is open	In the service queue, out of sight of sales	**In the brief, with its number and age**
The quote expires first	Nobody compares the dates	**Flagged before you go in**
The manager wants to know	Asks the rep	**Sees the same brief on the account**

DELIVERY

Your meetings, your risks, your records.

1

Map your sales process

Your meetings, deal stages, renewals and what your managers need to see.

2

Configure in your org

The agent in the Agentforce panel, the account panel, and your risk thresholds and wording.

3

Test with your real accounts

Last month's meetings replayed before go-live and before every change.

4

Go live and hand over

One team first, then everyone, with a runbook and the test set.

Deployable source
The agent, actions, objects and screens as Salesforce metadata.

Solution design
A Solution Design Document with UML for your architects.

Test suite
Apex tests plus replayed conversations, run before every release.

Least-privilege access
Permission sets for the agent user and for your staff.

Runbook and handover
How to run it, change its rules and roll back.

YOU PROVIDE Sales Cloud · Agentforce · Logged activity · Cases (optional)

NEXT STEP

Get the Meeting Prep Brief Agent scoped for your org.

A free 60-minute review with an architect: what it would do in your org, what it needs and how long it takes.

EMAIL

contact@synconai.com

THE AGENT

synconai.com/ai-agents/meeting-prep-brief-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER