SALES AND REVENUE · AGENTFORCE EMPLOYEE AGENT

Prospect-to-Offer Matching Agent

Matches a prospect to the best offers in a catalog (service packages, partners or investment vehicles) using fixed filters and weights.

The user enters a prospect profile and receives a ranked shortlist with reasons. A repeatable matching process instead of manual spreadsheet filtering.



3	6	2	8
SUBAGENTS	ACTIONS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Profile capture
Gathers and confirms the prospect profile.

Match and rank
Filters, scores, explains.

Match follow-up
Explains, reruns, saves.

THE RULES IT FOLLOWS

- The rationale may state only facts present in the profile or the offer record; missing facts are written as "not recorded".
- The agent never contacts prospects or offer owners.
- Scores follow the fixed weights exactly.
- Hard filters are never bypassed.

NOT INCLUDED

- Outreach or meeting booking with matched offers.
- Web scraping of prospect or offer data.
- Learning weights from past outcomes and batch runs.

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, Salesforce

RUNS ON
Sales Cloud, Agentforce; Data 360 optional for very large catalogs

BEST FOR
Business development, partnership managers, sales operations, account executives and alliance teams

INDUSTRIES
Cross-industry B2B · Partner programs · Software marketplaces · Professional services · Distribution · Financial services · Franchise networks · Agencies

WHAT YOU NEED

- ✓ Your offer catalog in a loadable format.
- ✓ Agreement on the weights and the minimum score.
- ✓ Data 360 only if the catalog exceeds a few thousand records.

Coming soon. Designed in full and built to the same standard as the live agents.

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