SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · SALES AND REVENUE · NOVEMBER 2026

Win/Loss Analyst Agent

Interviews the rep in Slack when an opportunity closes, saves a coded reason and posts monthly trends.



STATUS
COMING SOON

WORKS WITH
Works with your team

WHERE IT WORKS
Slack

CONTACT
contact@synconai.com

salesforce PARTNER

THE JOB IT TAKES ON

What the Win/Loss Analyst Agent takes off your team.

WHAT IT DOES

An Agentforce agent that interviews the rep in Slack when an opportunity closes, saves a coded reason and posts monthly trends.

WHAT CHANGES

Clean, comparable win and loss data instead of blank or vague reasons.



WHO USES IT Sales reps, sales managers, revenue operations, product marketing and sales leaders

WHAT IT DOES

Everything the Win/Loss Analyst Agent handles.

01

Loss interview

Three questions for Closed Lost.

02

Win interview

Two questions for Closed Won.

03

Monthly trends

First Monday post.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 Ask at most three questions for Lost and two for Won, then save.

02 One reminder after 48 hours without a reply, then stop.

03 Monthly post shows counts and amounts with no rep names attached to losses.

04 Never change stage or amount.

TESTED BY REPLAY Scripted conversations, including the awkward ones, are replayed against the records they should create before go-live and before every change.

DELIVERY

Scoped with you, built in your org.

1

Scope with you

The actions it needs, the rules it follows and who approves what, in a fixed plan.

2

Build in your org

The agent, its Apex actions, objects and screens, as deployable Salesforce metadata.

3

Test by replay

Your own conversations replayed against your records before go-live.

4

Go live and hand over

A runbook, the test set and a walkthrough, so your team owns it from day one.

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 Your list of loss reasons if different from the default.

NEXT STEP

Get the Win/Loss Analyst 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/win-loss-analyst-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER