FREE CHECKLIST

Agentforce readiness checklist

20 points to check before you build an Agentforce agent. Work through them with whoever owns your Salesforce org and tick what is true today. It takes about 15 minutes.

1. Use case

- [ ] One task is named, not a theme.
  "Answer order-status questions", not "improve service".
- [ ] It happens often.
  At least a few hundred times a month, or the saving will not cover the cost.
- [ ] A person already follows a repeatable process for it.
  If humans cannot agree on the steps, an agent cannot either.
- [ ] You know what "done" looks like.
  A reply sent, a record updated or a case closed.

2. Data

- [ ] The records the agent needs are in Salesforce or reachable from it.
  List the objects and any outside systems.
- [ ] Key fields are filled in and trusted.
  Check completeness on the five fields the task depends on.
- [ ] Duplicates are under control.
  Especially accounts and contacts.
- [ ] Knowledge articles are current.
  Retire anything older than your last process change.

3. Org and licences

- [ ] You are on Enterprise or Unlimited edition, or know the upgrade cost.
- [ ] You have chosen, or priced, an Agentforce pricing model.
  Per action, per conversation or per user.
- [ ] A sandbox is available for build and testing.
- [ ] Someone internal owns the org and can approve changes.

4. Guardrails

- [ ] You have listed what the agent must never do.
  Refunds over a limit, legal advice, deleting records.
- [ ] There is a clear hand-off to a human.
  Who, through which channel, within what time.
- [ ] Sensitive fields are identified.
  Decide what the agent may read and what it may show.
- [ ] Someone will review conversations in the first weeks.

5. Measurement

- [ ] You know today's volume and handling time for the task.
  This is the baseline.
- [ ] You have picked one success number.
  For example, share of requests resolved without a person.
- [ ] You have a monthly usage budget.
  So Salesforce charges do not surprise you.
- [ ] A date is set to review and decide on the next agent.

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How to read your score

Ticks	What it means	Next step
16-20	Ready to build.	Go straight to a fixed-price build.
10-15	Close. A few gaps to fix first, usually data or guardrails.	A one-week Readiness Check will list and size them.
Under 10	Not yet. Building now would cost more than waiting.	Fix the use case and data sections first.

Send us your score

Email your ticks and the task you have in mind to info@parallelcloudteam.com. We will tell you which gaps matter, at no charge.

Fixed-price Agentforce: Readiness Check $1,500 | QuickStart, one agent live, $7,500 | Scale $18,000. Half the fee is due only at go-live.

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