



Accelerating Sales Performance with AI and Agents

Discover seven use cases for AI-powered SPM success.

Build Plans

	Owner	Quota

Sales Coaching

To close this deal, compete on value, not on price.

Sales Call

Deal Closed

Commission Breakdown

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Introduction

Artificial intelligence is not a new phenomenon in the sales world. For years, it's been implemented as an operational tool, helping sales organizations mitigate inefficiencies and automate routine tasks. But now, as AI continues to evolve, it's moving from the sidelines to the center of sales performance strategy – giving leaders deeper insights, faster decision-making capabilities, and a competitive edge.

One major advancement has been the emergence of autonomous agents: AI systems that can independently perform tasks, make decisions, and learn from interactions without constant human intervention. With autonomous agents (like those from Agentforce), AI evolves from a helpful tool to a continuous companion throughout the sales process – capable of handling complex workflows, providing personalized guidance and support to sellers, and adapting over time as agents process new information.

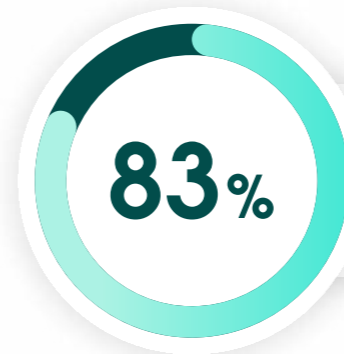
Still, many sales orgs face a common roadblock: They know AI holds massive potential but struggle to understand how to apply it to sales performance management (SPM). An effective SPM strategy is a comprehensive, fully integrated effort to enhance every stage of the sales process. But what does AI-driven SPM look like? Where should teams begin? And what real business value can they expect from it?

This e-book answers those questions by exploring seven use cases that span the entire SPM process – from sales planning to proactive enablement to compensating sales reps.

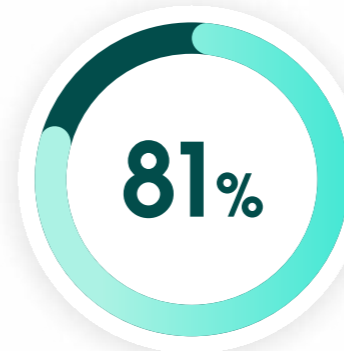
Note on AI preparation before we dive in:

AI is only as good as the data that fuels it.

Clean, comprehensive sales and performance data is easiest to secure when you bring operations together on one single platform. Only then can you layer on AI that delivers relevant, impactful outputs. Learn more about getting your data ready for AI [here](#).



of sales teams with AI saw revenue growth in the past year – versus 66% of teams without AI.¹



of sales teams are investing in AI.¹



of sales ops teams have updated their tools and tech stack to prepare for AI implementation.¹

^[1] Salesforce State of Sales Report

AI for SPM: Key Use Cases



01

Sales Planning

Identify risk areas and underperformance.

Challenge

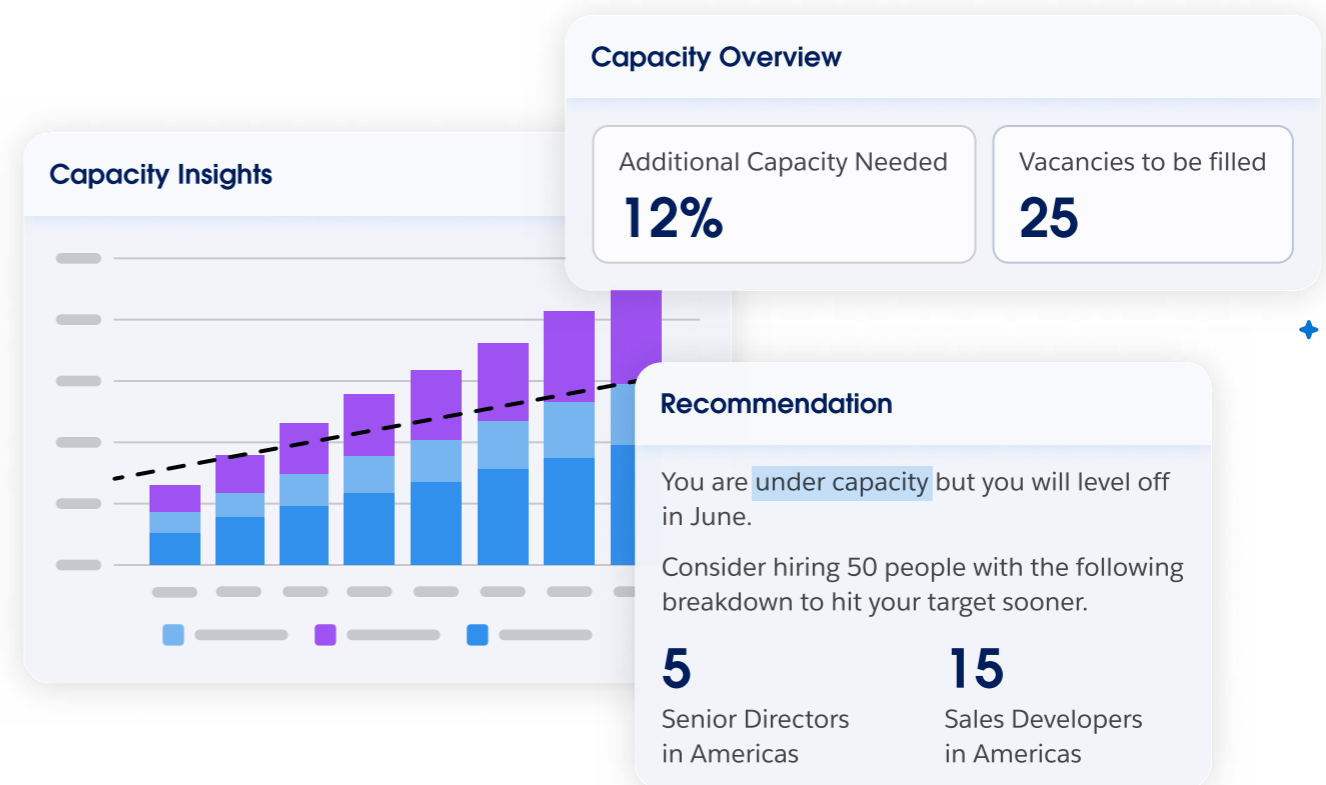
Sales leaders need to monitor performance across the organization in order to identify risks and pivot quickly to keep sales plans on track. But they deal with a massive volume of continuously evolving performance data across the organization, and they're often relying on manual analysis efforts. As a result, it's difficult to identify risks before they've become consequential – resulting in missed opportunities, forecast inaccuracies, and lost revenue.

How AI can help

AI-powered diagnostics can continuously monitor sales execution against plans and benchmarks in order to identify early signs of risk, like an underperforming territory or a specific product that's trailing behind its targeted revenue. The tool can then automatically surface these insights to leadership, enabling them to intervene earlier, adjust strategies, and reallocate resources to get back on track.

Example

At the start of the new year, a financial services firm works with Salesforce to implement AI to surface automatic insights within their Sales Planning solution. On January 26, AI flags a region that is trending below average, and delivers this information to leadership through an automated alert in the CRM. By February 5, leadership has already shifted headcount and marketing resources to support this region. By the end of March, revenue generation in the region has significantly increased – enough to meet its quarterly target.



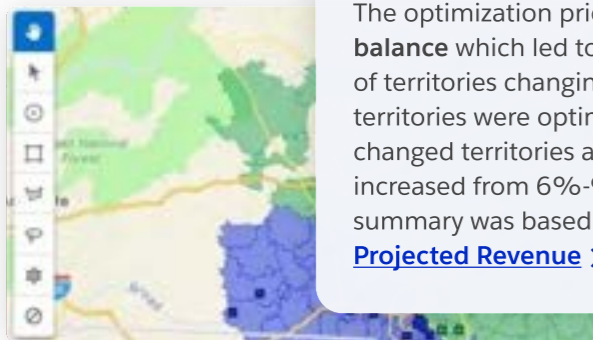
02

Sales Planning

Summarize sales plans and trends.

Challenge

Traditional sales planning methods are resource-intensive, requiring ops teams to perform a ton of administrative legwork as they analyze plans, map territories, and summarize new plans to reps and leadership. Many sales platforms aren't built with agility in mind, leaving sales ops stuck in rigid systems that make it hard to make data-driven decisions and adapt to new information. The time and resources required to create, deploy, and track sales plans ultimately delay reps' readiness to sell and limits revenue generation.



Legend History **Summary**

Agentforce Summary

The optimization prioritized **balance** which led to a number of territories changing. 24 territories were optimized, 600 changed territories and balance increased from 6%-96%. The summary was based on [Projected Revenue >](#)

How AI can help

Ops teams can leverage AI to automate the analysis and summarization of sales plans. By evaluating previous plans, quota performance, and market trends, AI can surface key changes and generate comprehensive summaries much faster than a human team – all while taking manual work off ops' plate. Leaders are immediately grounded in sales plans to date, while reps understand what plan changes impact them personally and are able to start selling faster.

Example

A global software company has struggled to deploy their sales plans efficiently. When new members are added to their sales leadership team, they need to get up to speed on the sales org's past performance, but they lack an efficient method to quickly summarize plans in a digestible format.

The company uses Salesforce's Sales Planning tool to create and distribute plans directly within their CRM. They leverage AI to analyze and summarize plans – including past plans and new changes – directly to sales leaders' flow of work. Analysis that once took weeks is now a rapid process with a diminished learning curve for their ops team. The team uses these insights to develop new plans much quicker, and AI-generated summaries help leadership and reps understand important plan changes immediately.

Future Innovation

The next frontier for AI-powered sales planning is natural language. Ops teams will be able to leverage planning agents to ask questions – like “What will the impact be if we increase quota by 10% for enterprise deals?” – and get instant feedback grounded in historical sales data. Sales planning will become more efficient and dynamic as a result.

03

Sales Enablement

Auto-enroll sellers in personalized enablement programs.

Challenge

Sellers underperform, but given reps' diverse skills and personalities – not to mention deal complexity – it can be difficult for leaders to pinpoint the exact skills and behaviors that need improvement.

While plenty of enablement programs exist, leaders often select programs that are easy to roll out but aren't necessarily the right fit for each rep's unique challenges and deficiencies. This can lead to low program adoption, ineffective enablement, and stagnated performance.

How AI can help

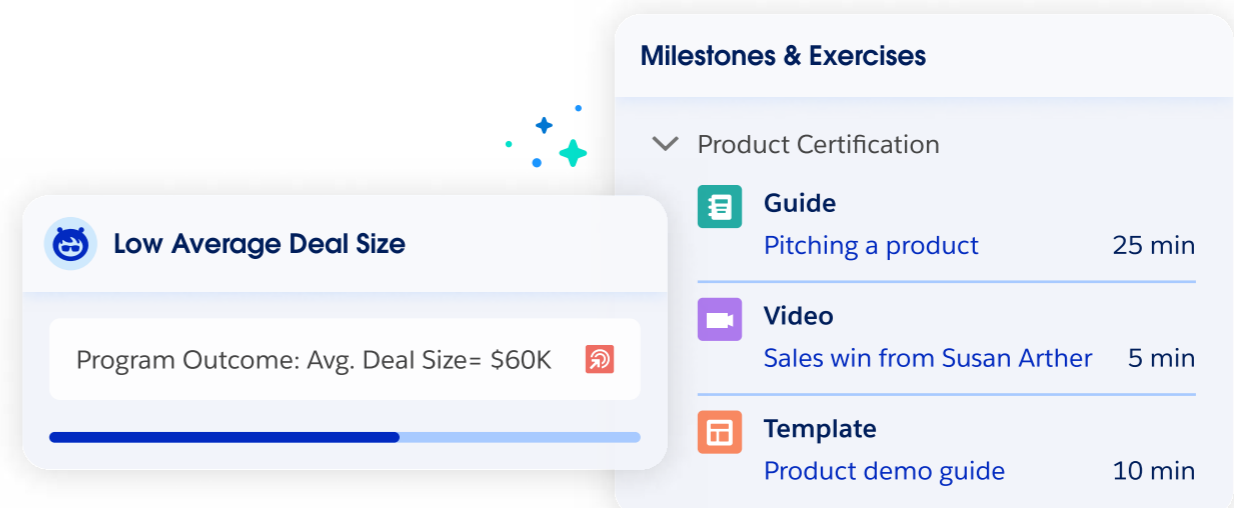
AI can continuously analyze seller performance data – CRM activity, call recordings, deal progression, win/loss patterns, and so on – and surface specific areas for improvement. Then, it can automatically enroll the rep in a targeted enablement program designed to address each rep's specific area of weakness.

Example

Sales leaders at a small technology company have struggled to manage performance issues across their team. They offer a variety of enablement resources, but they keep running into the same problem: a program will help certain reps sharpen their skills, while other sellers will complete the same program and show no tangible performance improvement.

The company implements Salesforce's Sales Programs solution, which is built into their CRM and allows them to deliver enablement programs directly to sellers' flow of work. They then use AI to analyze rep activity and deal outcomes, and identify patterns. Then, it delivers enablement recommendations in the flow of work.

For example, when a rep consistently loses deals in the negotiation stage, AI flags the pattern and automatically enrolls them in a targeted program, "Mastering Negotiations." With this training completed, the rep's win rate improves dramatically over the subsequent quarter.



The screenshot displays a Salesforce interface with two main components:

- Low Average Deal Size:** A notification card with a blue icon of a person with a speech bubble. The text reads "Low Average Deal Size" and "Program Outcome: Avg. Deal Size= \$60K". Below the text is a progress bar that is approximately 60% full.
- Milestones & Exercises:** A list of tasks under the heading "Product Certification".

Resource Type	Resource Name	Duration
Guide	Pitching a product	25 min
Video	Sales win from Susan Arther	5 min
Template	Product demo guide	10 min

04

Sales Enablement

Coach sellers on new product messaging before sales calls.

Challenge

In fast-paced selling environments, messaging changes often – new products are released, existing products are updated, and methods for effectively selling to customers evolve. But sales reps often struggle to retain and apply new messaging, resulting in inconsistent pitches, missed opportunities, and slow adoption of new go-to-market strategies.



How AI can help

AI-powered sales coaching agents give sellers a secure, personalized space to test their knowledge before bringing new messaging into the field. These agents leverage real opportunity and market data to answer sellers' questions and simulate real-life scenarios they may encounter when interacting with customers. Reps can then rehearse messaging, handle objections, and receive instant feedback – helping them get ramped up faster and sharpen their performance before talking to customers.

Example

A global telecommunications company is preparing for a new product launch geared towards companies in financial services, an industry that many of their reps lack experience with. So, their reps leverage Agentforce Sales Coach to help sellers get up to speed and practice delivering new messaging to customers.

Dedicated coaching agents enable sellers to practice pitching to these potential customers. Reps record their pitches and then agents provide feedback, analyzing the recorded pitches using a knowledge base of new product messaging, industry information, and available CRM data such as account and opportunity details, to provide tailored feedback. As a result, sellers enter new conversations fully prepared, and early-stage conversion rates improve within the first month of the product launch.

The screenshot displays the 'Pitch Practice' interface. It features a central video feed of a woman speaking. To the left, a 'Prompt' box asks 'Ready to practice your pitch?' with a 'Start' button. Below the video, a text box says 'Thanks for giving me a minute to share.' To the right, a 'Feedback' panel lists sections: 'Overall impression', 'What Went Well', 'Areas to Improve', and 'Next Steps', each with a progress bar.

05

Sales Enablement


Conduct more effective sales meetings.

Challenge

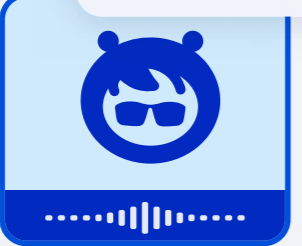
Sellers struggle to identify what's working, or not working, within their open opportunities. They sometimes enter customer meetings having missed an important element of discovery, which can result in deals stalling out in the early stages. Or, they're poorly equipped to navigate closing and negotiations, which can result in difficulties getting deals closed in late stages.

Role-play

Role-play Feedback



I noticed that you brought up concerns about pricing. Lets talk about that.



Yes, thank you. I'm interested in a discount on the premium package.

To close this deal, compete on value, not on price.

How AI can help

AI agents are able to analyze opportunity history, CRM data, and customer behavior to coach sellers on how to effectively navigate conversations in order to achieve desired outcomes, whether that means progressing to the next stage or closing a deal within an approved price point. Before a meeting, reps can perform personalized role-plays, with the agent serving the role of the potential customer, providing real-time responses based on available deal information. Reps enter meetings more prepared to drive every deal forward.

Example

A major manufacturing company has struggled to accelerate their sales cycles and seen a decline in win rates as their sales team has expanded. They implement Agentforce Sales Coach to help. Now their reps are able to engage in personalized role-plays tailored to each deal and deal stage.

Because the manufacturing company uses Agentforce, an AI agent has access to deal data, product messaging, industry information, and prospect details, so it can provide reps with contextual answers that simulate a customer's responses, while also giving sellers targeted recommendations on how to proceed with each opportunity. This ultimately sets up the sales team for sales call success, and results in shorter sales cycles with increased close rates.

Future Innovation

As agent-driven enablement continues to develop, agents will be able to guide reps through even more granular coaching scenarios. Agents will become more customizable, helping reps practice for hyper-specific interactions, such as a customer who has a rare concern about compliance or has experienced a highly complex problem with their infrastructure.

Sales Compensation

Help sellers maximize revenue outcomes.

Challenge

Sales leaders want to help sellers close the most valuable deals. Sales reps want to hit their number and take home the biggest paycheck possible. But while sellers may have a number of open opportunities, they have limited visibility into which opportunities will drive the most commission, especially as quarters wind down or comp plans shift. Their inability to prioritize deals based on earning potential results in lost income for the sellers – which can diminish motivation and morale – and less revenue for the sales org as a whole.

How AI can help

AI can evaluate a seller’s pipeline and identify which deals will yield the highest commission based on established business indicators – such as probability to close and deal timing. It then surfaces the highest-impact deals for each rep, so they can prioritize their time, focus on the most valuable opportunities, and maximize their overall earnings during a given pay period.

Example

Sales reps at a health services provider have reported dissatisfaction with their compensation process, with many of them citing poor visibility into earnings potential. The company already uses Salesforce for their CRM, so they’re able to easily implement Spiff to manage commissions automatically and give sellers real-time visibility into their earnings potential. From there, Salesforce helps them integrate AI into their comp visibility in order to analyze reps’ pipeline and suggest high-commission opportunities at various stages of each pay cycle.

The following quarter, reps are able to easily understand and prioritize deals across their pipeline. The company’s sales leadership reports stronger pipeline coverage across key segments.



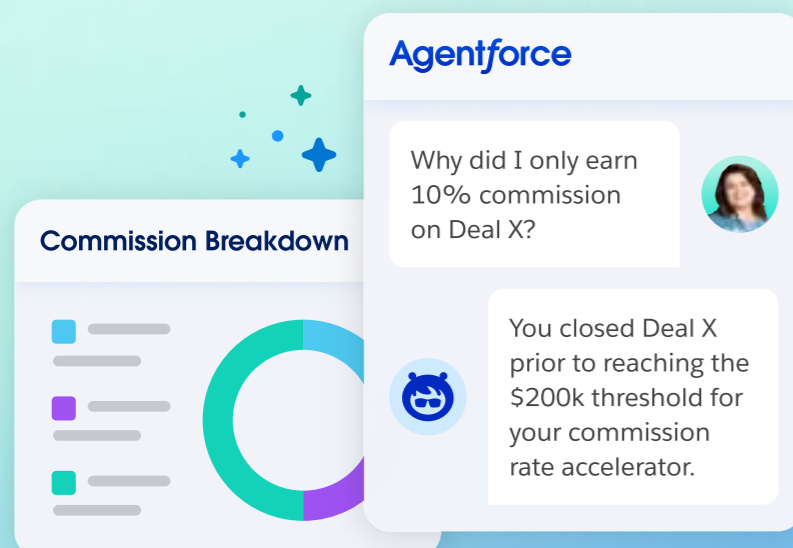
07

Sales Compensation

Reduce compensation inquiries and build trust with sellers.

Challenge

Too often, sellers are confused about their pay – specifically, what contributes to their commission. To find clarity, they submit questions to ops or compensation teams. These teams get bogged down in inquiries and waste a lot of time going back and forth with reps, which slows down sellers' productivity as well as their own. And when reps don't receive adequate or timely answers, their trust in the compensation process diminishes.



How AI can help

Instead of submitting inquiries to compensation teams, sellers can use AI embedded in their CRM to receive timely insights about their pay. AI can accurately answer common compensation questions instantly, pulling from current plan data and transaction records. Reps get the visibility they need while compensation teams free up time to focus on more strategic tasks.

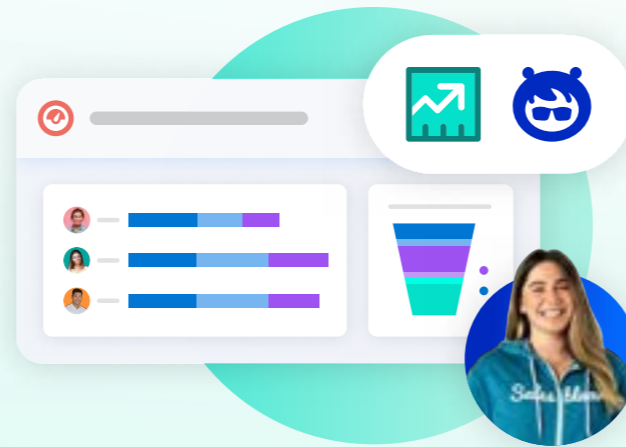
Example

The compensation team at a consumer goods company has often been overwhelmed by questions from their sales staff, particularly after rolling out changes to their incentive comp plans. The company implements Salesforce Spiff to automate their commission process, and as part of the implementation, they implement AI that is capable of responding to more than 80% of sellers' compensation-related questions instantly.

As a result, the compensation team frees up time to focus on optimizing comp plans and developing new strategies to drive revenue – and sales reps report higher engagement and trust in the comp process.

Future Innovation

As AI continues to evolve, it won't just be a tool for communication and visibility around compensation – it will also play a key role in the compensation planning process. Agents and AI will enable ops teams to design, simulate, and adjust compensation plans using natural language prompts – resulting in plans that are created faster, easier to iterate, and more closely aligned with evolving business needs.



Build a limitless sales team with AI-powered SPM.

While AI solutions like Agentforce Sales Coach are already raising the ceiling on sales performance potential, there are many more exciting innovations just around the corner – all designed to enhance your SPM process and fuel new growth.

Get started today with prebuilt AI sales agents.

[Learn more](#)



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