

Case study: How Vertex Helped Our Customer Reclaim Valuable Time & Data

CLIENT OVERVIEW:

A health and wellness brand focused on recovery, mobility, and performance products serving both direct customers and a nationwide network of sales representatives and partners. The organization manages a high volume of customer orders, repeat purchases, and partner-driven transactions through Salesforce, which functions as the system of record for sales performance, customer engagement, and order activity.

As the business scaled and demand increased, Salesforce became central to executive decision-making and sales leadership visibility. While the organization had strong CRM adoption and comprehensive data capture, leadership faced challenges quickly accessing actionable insights without relying on technical reports, dashboards, or specialized resources.

THE CHALLENGE:

"I know exactly what I'm looking for. I just don't know how to get it - and I don't have time to learn."

That's how the Vice President of Sales summed up the challenge during an on-site whiteboarding session.

Like many organizations, this company has invested heavily in Salesforce. Their CRM contained rich order data, customer histories, and sales performance metrics. Reports existed. Dashboards existed. Analysts could pull answers when asked but in due time and perhaps with a few obstacles along the way.

But for leadership, insight didn't move fast enough nor was it accessible enough.

Simple questions like Are sales up or down? What's changing this month? Which customers are slowing their reorders? often required:

- Navigating multiple dashboards
- Requesting ad-hoc reports
- Waiting for someone else to interpret the data

The issue wasn't availability. It was accessibility, speed, and effort. The Sales leadership teams wanted answers. Not another system to learn.

BUSINESS IMPACT:

Vertex partnered with the client to reimagine how leaders and sales teams interact with CRM data with the goal of shifting from report-driven analysis to conversation-driven insights.

By introducing an Agentforce Insight Agent directly within Salesforce, executives gained the ability to ask high-level business questions in plain language and receive immediate and trusted responses based on live CRM data without setting up any complicated API's or hundred-hour integration efforts.

Results achieved include:



Near-instant answers to common executive questions



Reduced dependency on analysts and report builders

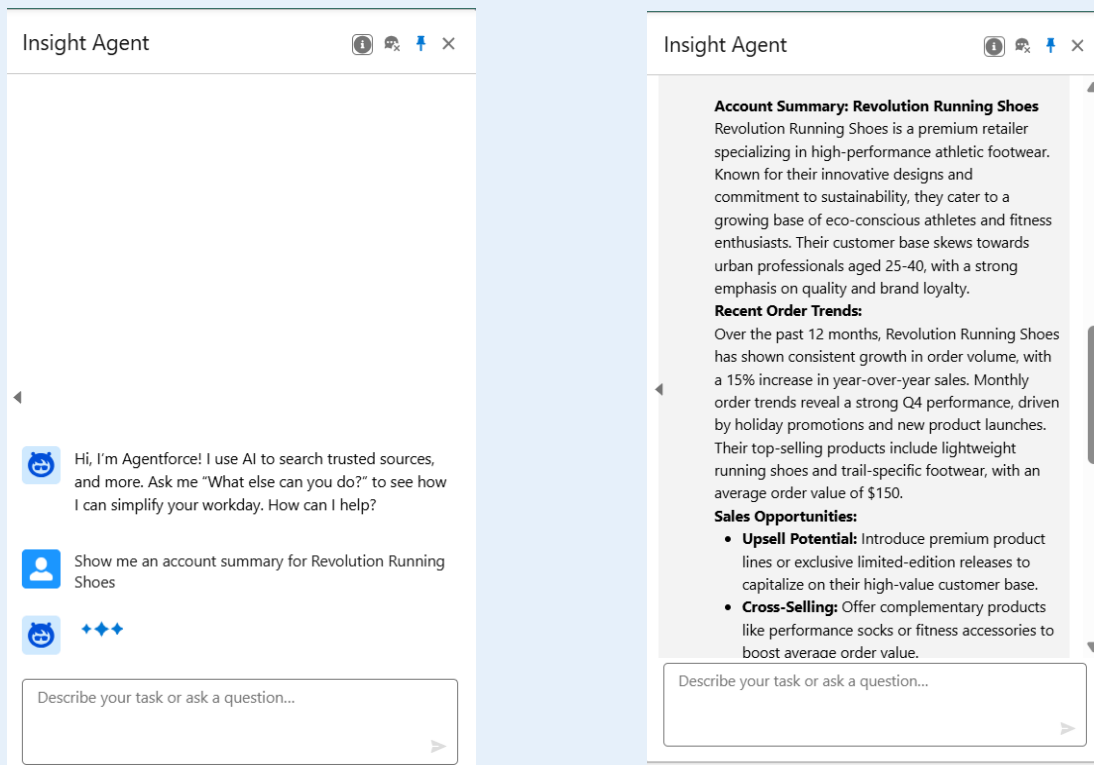


Faster recognition of historical sale activity and performance shifts



Improved confidence in day-to-day decision-making

WHAT VERTEX DELIVERED

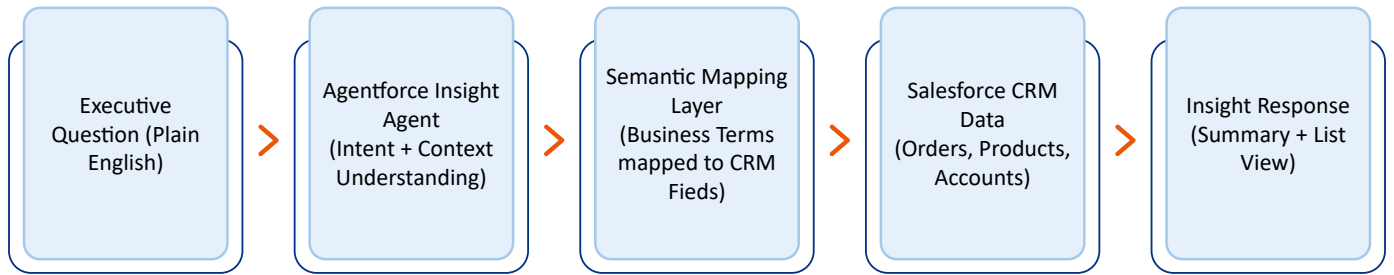


- Designed and implemented an Agentforce Insight Agent within Salesforce leveraging standard Agentforce Employee Agent functionality
- Enabled natural-language querying of existing CRM data using intent-aware prompt logic
- Configured read-only access aligned with Salesforce object, field, record-level security and permissions
- Delivered a conversational interface tailored for executive and sales users
- Conducted guided enablement sessions focused on real-world business questions

TECHNICAL HIGHLIGHTS:

- **Salesforce Agentforce (Employee Agent Architecture):** Implemented an Agentforce Insight Agent using Salesforce's Employee Agent framework, purposefully built to support internal users such as sales leaders and executives within the Salesforce UI.
- **Intent Aware Natural-Language Query Engine for CRM Data:** Designed prompt logic to interpret executive-style questions, infer timeframes and trends, and translate intent into CRM-grounded insight generation. Enabled plain-English querying across Salesforce CRM data, allowing users to ask high-level business questions without report builders, filters, or technical syntax.
- **Read-Only Permission-Aware Data Access:** Configured the agent to operate in a strictly read-only capacity, honoring native Salesforce object, field, and record-level security to ensure users only see data they are authorized to access.
- **CRM-Native Data Retrieval (No External Sources):** The agent retrieves insights exclusively from Salesforce CRM data, ensuring responses are grounded in trusted, system-of-record information with no dependency on external systems or APIs.
- **Contextual Insight Generation:** Designed the agent to interpret user intent to best recognize timeframes, trends, and comparisons, while dynamically adjusting responses based on conversational context and follow-up questions.
- **List View & Summary Output Support:** Configured the agent to return structured outputs such as summaries, ranked results, and Salesforce list views that users can further refine or explore as needed.
- **Embedded Salesforce User Experience:** Deployed the agent directly within the Salesforce interface, ensuring seamless access without requiring users to switch tools or learn new platforms.
- **Semantic Mapping Between Business Language and CRM Schema:** Configured the agent to understand sales-specific terminology (e.g., "SKU," "product," or "item") and intelligently map those terms to the appropriate Salesforce objects and fields, even when no direct one-to-one relationship existed. This ensured accurate insights without requiring users to know CRM data structures.

From Question to Insight

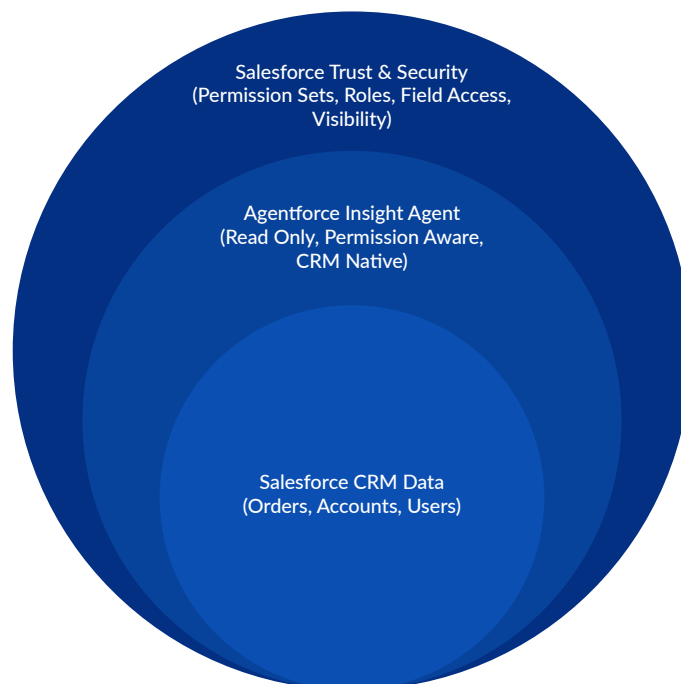


Translating Business Language to CRM Schema Mapping

What a Sales Leader Asks the Agent	How the Agent Interprets It
"Are sales up or down this month?"	Identifies timeframe, compares totals to prior period, determines trend
"What changed since last quarter?"	Applies period-over-period comparison and summarizes key shifts
"Which SKUs are slowing down?"	Interprets "SKU" as Ordered items and detects declining volume
"Which customers are slowing their reorders?"	Detects reduced Order frequency or value by account
"What's my rep team's performance this week?"	Groups results by owner and aggregates recent activity
"Which accounts should I be worried about?"	Flags Accounts showing declining revenue or purchase activity

The Insight Agent securely analyzes multiple CRM data domains behind the scenes, translating conversational questions into trusted, permission-aware insights.

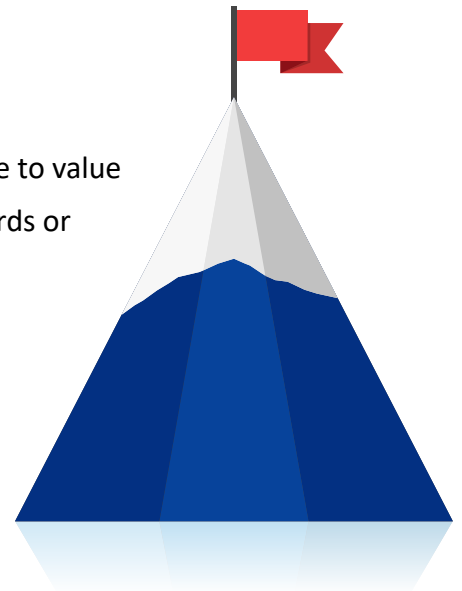
Built-In Data Governance with Agentforce



The Insight Agent operates entirely within Salesforce, inheriting native security, permissions, and access controls. Governance is enforced by the platform not custom logic.

ACHIEVEMENTS:

- Delivered a production-ready Agentforce Insight Agent with rapid time to value
- Enabled executives to self-serve insights without reliance on dashboards or analysts
- Achieved adoption among sales leadership within days of launch
- Established a scalable foundation for future Agentforce and AI-driven use cases



UNIQUE VALUE PROVIDED BY VERTEX:



Business-First AI Design: Vertex focused on executive decision-making outcomes, not AI novelty. This ensured the solution addressed real leadership pain points from day one and was trusted upon go-live.

Salesforce-Native Expertise: Leveraged deep Salesforce and Agentforce knowledge to deliver a solution fully aligned with native security, data models, and user experience.



salesforce



Low-Risk, High-Impact Implementation: Delivered measurable value without complex integrations and external data sources. *Most importantly, this was completed with ZERO disruption to existing CRM operations.*

Collaborative Discovery & Enablement: Worked closely with stakeholders through whiteboarding and guided enablement sessions to ensure the agent reflected how leaders think and ask questions.



Scalable AI Blueprint: Designed the Insight Agent as a repeatable pattern that can be extended across additional business functions, users, and AI initiatives over time.