



RECLAIM SALES TIME. WIN MORE DEALS. SCALE REVENUE.

**An Agentic Guide for Revenue Leaders Ready
to Transform Front Office Operations**



EXECUTIVE SUMMARY

Your sellers spend **60% of their time on admin work** instead of selling, according to Salesforce's 2026 State of Sales (7th ed.) report. That's not a training problem or an effort problem — it's a structural problem.

The solution: embed AI agents directly into revenue workflows — not as insight tools, but as participants in execution. Agents that bring context at the moment of action, automate low-value tasks with guardrails, and coordinate work across systems in real time.

We tested this model on ourselves. We deployed agents into our own sales process, running them against live deals with real revenue on the line. We rebuilt our Salesforce environment mid-cycle, stood up a new org designed for agentic workflows, and put agents to work in pursuit shaping, account research, and sales coaching — while keeping the business running.

The result: sellers spend more time on deals and less time feeding systems. Capacity increased without adding headcount. The front office operates the way it's supposed to.

This white paper documents what we built, what broke, what held up in production, and how other revenue leaders can do the same.

EXECUTIVE TAKEAWAYS

01

The capacity constraint is structural, not behavioral.

When sellers spend 60% of their time on admin work, a 10-person team operates closer to four. The constraint isn't effort — it's how work flows through the front office.

02

AI creates advantage through execution, not insight.

Intelligence layered on top of broken processes generates more signals and more work. Intelligence embedded in workflows reclaims selling capacity without adding headcount.

03

Agentic transformation isn't optional; it's imperative.

Perficient brings the technology depth, industry context, and production-tested methodology to make it real — in live pursuits, with real revenue at stake.

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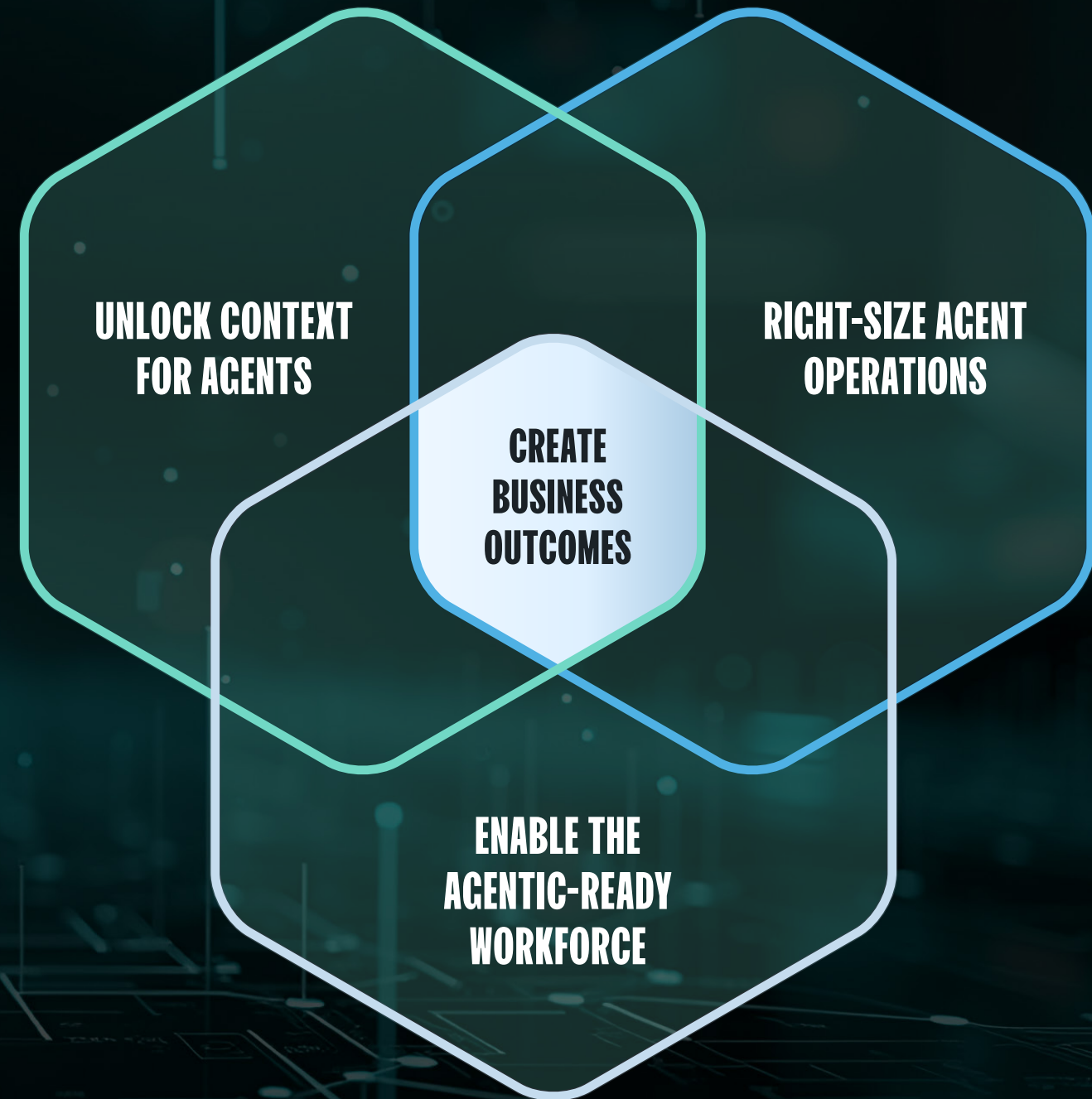
WHAT THE AGENTIC FRONT OFFICE IS – AND WHY WE BUILT IT

The Agentic Front Office reclaims the

60% of seller time lost

to internal selling activities and redirects it toward deal-shaping and customer engagement.

The model works by embedding AI agents directly into revenue workflows — not as an afterthought, but as participants in execution. Agents bring context at the moment of action, automate low-value tasks with built-in guardrails, and coordinate work across systems in real time.





Here's what that looks like in practice:

A seller opens an account record in Salesforce or starts a conversation in Slack. The agent immediately surfaces competitive intelligence, recent interactions, open proposals, and strategic context — no hunting, no toggling between systems. When the seller needs to prep for a meeting, the agent pulls relevant case studies, pricing guidance, and prior conversations. When it's time to update the forecast, the agent has already reconciled pipeline changes across teams.

We built this operating model because the opportunity to move was immediate — not theoretical. The same forces reshaping our clients' front offices were accelerating everywhere: rising expectations, compressed sales cycles, fragmented execution, and operating models built for a different era.

Acting decisively meant accepting real risk. We replaced our Salesforce environment mid-cycle, keeping the legacy system live while standing up a new org designed for the new operating model. We ran early agents in production against live deals, exposing what deployment actually requires: clean data, SDLC discipline, and change management that drives adoption.

What emerged wasn't a static blueprint. It was operational judgment built under load and a methodology shaped by real deals, real friction, and real results.

PROVING THE AGENTIC FRONT OFFICE MODEL IN PRODUCTION

Where Selling Work Slowed Down — and Why

In its manual state, our front office worked — but only through sustained human effort that came at a measurable cost. In an internal survey of sellers and delivery-adjacent colleagues, **59% reported spending more than 40% of their working time on non-selling activities**. Sellers rated their technology **3.3 to 4.0 out of 10** across every revenue-facing dimension — win rate, deal volume, deal size, margin, and customer relationships.

Behind these inefficiencies was a deeper constraint: **fragmented context**. Essential deal intelligence was distributed across Salesforce, personal files, homegrown solutions, Power BI, and Oracle — owned by different teams, governed differently, and rarely connected in ways that supported execution.

As one Perficient seller put it:

“**We’ve automated bad processes and keep building on top of them without examining how to improve the baseline jobs to be done.**”

To make an agentic front office viable, we needed a foundation designed for execution — one that unified context across fragmented systems, guided action in real time, and reduced cognitive and administrative load.

Rebuilding the Foundation

We didn't start with agents. We started with the foundation they require.

Our existing Salesforce environment couldn't support the model. Years of acquisitions had added complexity that would limit every agent we deployed. **So, we stood up a new org designed for the agentic process — while keeping the legacy system live, so the business didn't slow down.**

In parallel, we deployed early agents to learn by doing. Sales pitch coaching, account research, and event support were pressure tests that exposed what agent deployment actually requires: access to data, SDLC discipline, and real change management. Pilots like Salesforce's Account IQ shaped how we built account planning into the new system.

The MVP was tightly scoped to get sellers working in the new system, with a clear path to scale.

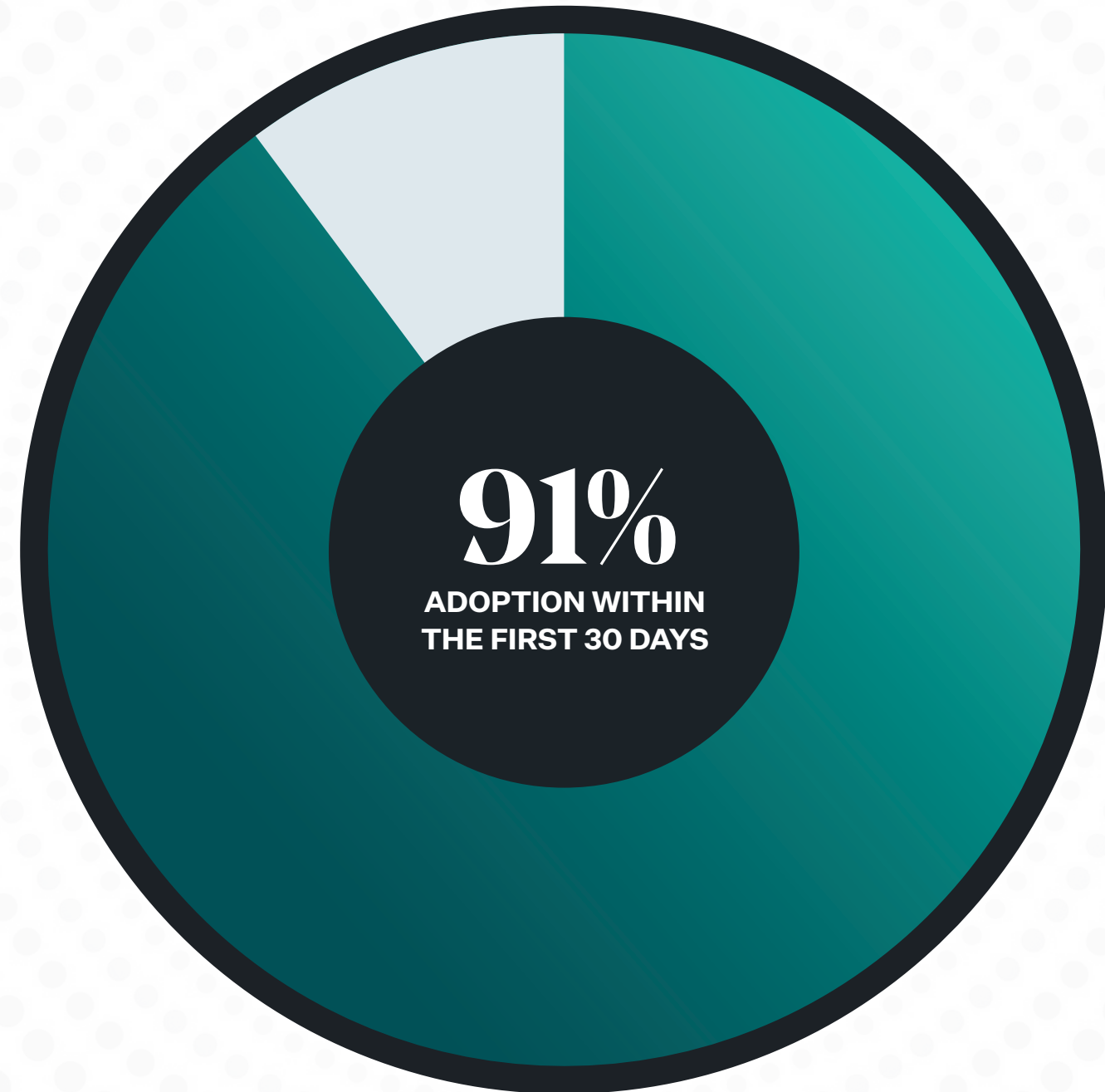
AGENT	PLATFORMS	FUNCTION
Sales Agent	Salesforce, Slack	Delivers account summaries and strategic insight, and updates Salesforce and Slack records to keep teams aligned and moving
Sales Pitch Coach	Salesforce	Improves pitch performance with direct, AI-powered feedback across role plays and negotiation
Account Research	Salesforce	Surfaces competitive intelligence and account insight that sharpen strategy and accelerate deal progress
Slackbot	Slack	Gives teams fast answers, searchable context, and real-time collaboration without breaking flow
Origination Agent	Databook	Surfaces early buying signals and opportunity insight that help teams build pipeline sooner
Proposal Agent	WRITER, Claude, GitHub	Shapes what to propose, builds tailored content, and guides teams to the right solution for each customer
Opportunity Shaping Agent	Databook	Delivers contextual guidance — POVs, commercial and legal direction, and historical deal artifacts — to accelerate deal cycles

Early Signals from Live Use

Because agents operated inside Salesforce and Slack, impact showed up where it matters most: in how sellers work. They found relevant context faster, entered customer conversations with greater confidence, and spent less time navigating fragmented information before key meetings. That's not incidental — it's change management working.

The early numbers support it. Within the first 30 days, **91% of sellers adopted the Salesforce and Slack agent environment** — a milestone that typically takes six months or more in enterprise deployments.

Seller sentiment is moving in the same direction. In early surveys, 40% of sellers reported increased confidence that the new agentic capabilities will drive deal volume. Confidence precedes behavior change. Behavior change precedes business impact.



Seven Sales Agents, Four Business Outcomes

AGENT	RECLAIM SALES CAPACITY 1 day/week admin time saved	INCREASE DEAL VELOCITY 1-week faster deal cycle	IMPROVE WIN RATES 10–30% win rate lift	GROW QUALIFIED PIPELINE 30–50% pipeline growth
SALES AGENT	✓	✓		
SLACKBOT	✓	✓		
SALES PITCH COACH AGENT		✓	✓	
ACCOUNT RESEARCH AGENT	✓		✓	
ORIGINATION AGENT	✓		✓	✓
PROPOSAL AGENT	✓	✓	✓	
OPPORTUNITY SHAPING AGENT	✓		✓	

Targets represent anticipated ranges based on deployment trajectory.
Quantifiable metrics expected by month three.

✓ **Primary Impact**

✓ **Secondary Impact**

THREE LESSONS FROM BUILDING THE AGENTIC FRONT OFFICE

Running agentic workflows under real sales conditions sharpened our understanding of what holds up in production.

01

CONTEXT MUST EXTEND BEYOND THE CRM

Agents are only as effective as the context they can access. Limit them to CRM data, and you compromise the quality of every decision they make. Integration across BI tools, ERP systems, and support platforms isn't optional. Without it, performance drops, trust erodes, and adoption stalls.

02

DEFINE THE ROLE OF THE AGENT BEFORE YOU BUILD

Define clear personas for each agent: what it does, what it can't do, and where human judgment is required. Consolidate overlapping agents and split those with overly broad scope. This clarifies where agents belong in core workflows — such as account planning or opportunity records, available when sellers need them — versus those best invoked on demand.

03

DON'T MAKE EVERYTHING AN AI PROBLEM

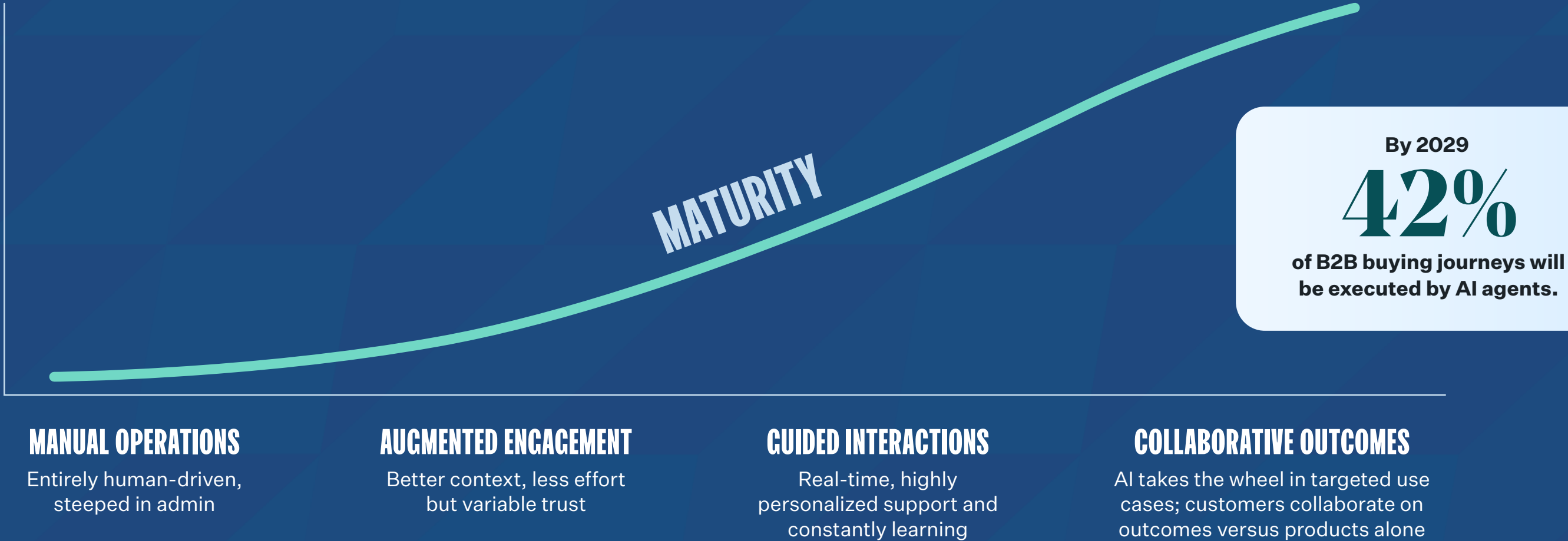
The highest returns come from applying agents selectively — where reasoning and autonomy create real advantage — and relying on automation, workflows, and dashboards everywhere else. That discipline reduces complexity, controls cost, and accelerates time to value.



PUTTING THE AGENTIC FRONT OFFICE TO WORK

Organizations advance by restoring selling capacity and reducing execution friction — not by adopting technology for its own sake. According to IDC’s FutureScape: Worldwide Agentic Experience Orchestration 2026 Predictions (Doc# US53858625, October 2025), **“By 2029, 42% of B2B buying journeys will be executed by AI agents navigating configuration, negotiation, and compliance autonomously, transforming sales with agentic AI augmentation.”**

As buyers change how they buy, front offices must change how they execute.



WHERE TO START — AND WHAT TO EXPECT

We don't sell you agents and walk away. We co-invest in outcomes — deploying agents into your live workflows, measuring what holds up under real execution pressure, and adjusting until the model works in production. This isn't a pilot. It's a partnership with revenue accountability.

We recommend three entry points — each designed to meet teams where they are and support progress from insight to impact:

FLASH DISCOVERY & ENVIRONMENT SCAN

Gain clarity on your front-office maturity, identify high-impact AI opportunities, and get a focused roadmap for where agents can deliver the fastest value — in days, not months.

OUTCOME-LED AGENTIC ACCELERATORS

Deploy targeted agents against your highest-friction revenue workflows — more qualified pipeline, faster proposals, sharper forecasting. We co-invest to make results last in daily operations.

AGENTIC SALES TRANSFORMATION

Drive end-to-end transformation with production-tested agent accelerators deployed across the full revenue lifecycle — pipeline and deal management, competitive intelligence, forecast, and sales coaching.

You're not too late for agentic transformation.

But organizations that embed intelligence into how work actually gets done will establish advantages others struggle to match. The decision is no longer whether to adopt AI — it's whether AI remains an experiment or becomes part of how your front office operates.





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