

# Noventiq Salesforce Agent

## RevSync AI - Powered by Noventiq

Noventiq's Salesforce Agent harnesses the power of Generative AI and Microsoft 365 Copilot to simplify, automate, and enhance interaction with Salesforce data. From updating lead statuses to generating comprehensive sales reports and analyzing customer feedback—this intelligent solution saves time, ensures accuracy, and boosts decision-making agility.

### Key Use Case Scenarios

#### A. Updating Lead Statuses

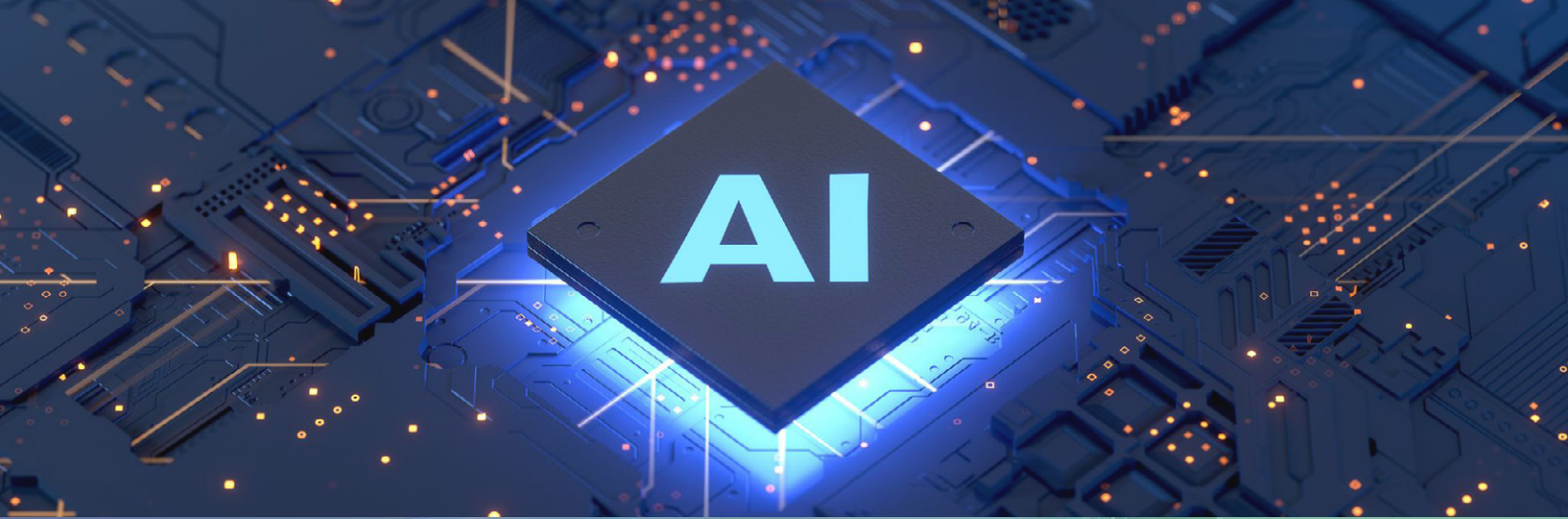
1. **Query via M365 Copilot** - Sales team requests lead details from Salesforce through the agent;
2. **Lead Status Update** - Team provides updated statuses; agent writes back directly to Salesforce;
3. **Outcome** - Time-saving automation with improved accuracy and better CRM hygiene.

#### B. Sales Report Generation

1. **Data Extraction** - Agent pulls sales data by region, product, or period via natural language queries;
2. **Automated Report Creation** - Agent compiles visual-rich reports with actionable insights;
3. **Outcome** - Timely and accurate reports for strategic decision-making.

#### C. Customer Feedback Management

1. **Data Retrieval** - Agent pulls feedback records, ratings, and resolution logs;
2. **Insight Generation** - Identifies sentiment trends, pain points, and improvement areas;
3. **Outcome** - Enables proactive service improvement and customer retention strategies.



## Customer Benefits

- ▶ **Reduce Manual Effort:** Automates tedious Salesforce interactions;
- ▶ **Accurate, Real-Time Data:** Ensures precise, up-to-date CRM insights;
- ▶ **Boost Operational Efficiency:** Frees teams to focus on selling, not data entry;
- ▶ **Seamless UX:** Native Microsoft 365 Copilot interface makes interaction intuitive;
- ▶ **Proactive Insights:** AI turns raw data into actionable intelligence;
- ▶ **Secure & Compliant:** Built with enterprise-grade controls and governance.

## Value Proposition

- ▶ **Accelerate Decision-Making** with real-time CRM insights;
- ▶ **Automate to Scale** without increasing operational overhead;
- ▶ **Empower Sales & Service Teams** with smarter workflows;
- ▶ **Reduce CRM Fatigue** and increase data reliability.

## Technical Stack

- ▶ Microsoft 365 Copilot;
- ▶ Salesforce APIs;
- ▶ Azure OpenAI.



## Use Cases

- ▶ Sales Lead Management;
- ▶ Real-Time Report Generation;
- ▶ Customer Feedback Analytics.



# Implementation & Investment

## Professional Services Deployment Scope

Phase	Duration	Key Deliverables
Discovery & Requirements	4-5 days	Current process map, use case prioritization, tech readiness assessment
Design & Workflow Config	5-7 days	Lead management automation flow, report generation templates, feedback analysis logic
M365 Copilot Prompt Engineering	Part of Design	Context-aware prompt design, user role configuration, integration connectors
Salesforce API Integration	8-10 days	API integration setup, field mapping & validation, secure authentication workflows
AI Workflow Development	7-9 days	Azure OpenAI integration, sentiment scoring, dynamic report generation
Testing & UAT	5 days	UAT script & report, error resolution, workflow refinements
Go-Live & Change Management	3 days	Go-live checklist, quickstart guide, training workshop & Q&A
Optional Support	Optional	30-day support window, enhancements backlog, issue tracking dashboard

**Total Timeline:** 4-5 weeks (20-25 business days)

## Investment Structure

Item	Cost (INR)
Core Professional Services (Fixed Scope)	₹6,50,000 - ₹8,00,000
Additional Copilot Prompt Packs	₹1,00,000 (optional per pack)
1-Month Post-Go-Live Support (optional)	₹1,50,000
Salesforce Custom Objects/Complex Logic Add-on	₹1,00,000 - ₹2,00,000 (based on scope)

**NOTE:** Final pricing may vary depending on number of Salesforce objects, business units involved, and data complexity.



# Why Choose Noventiq?

- ▶ **Global AI + CRM Expertise;**
- ▶ **Pre-Built + Customizable Use Cases;**
- ▶ **Enterprise-Ready with Security & Compliance.**

## Key Features Summary

- ▶ **Updates Salesforce records** via M365 Copilot;
- ▶ **Generates sales and feedback reports** on-demand;
- ▶ **Reduces manual Salesforce navigation;**
- ▶ **Real-time, voice-like queries** via M365 Copilot;
- ▶ **Faster insights, smarter actions.**



**Ready to Transform  
Your CRM Operations?**

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Custom proposal and demo  
available

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