

Agentforce Data Readiness Assessment

Is Your Enterprise Data Ready to Power Intelligent AI Agents?

Agentforce can only deliver meaningful business outcomes when it has access to the right enterprise context. Customer records, service history, product usage, operational signals, revenue data, and support activity often sit across Salesforce, Data Cloud, cloud platforms, data warehouses, and line-of-business systems.

When that context is fragmented, AI agents may automate tasks but still make decisions with an incomplete view of the customer or business.

This assessment helps you evaluate whether your Salesforce, Data Cloud, and enterprise data architecture are ready to support Agentforce at scale.

How It Works

For each question, select the option that best reflects your current environment, not your roadmap:

Disconnected – Data and context remain fragmented across systems, limiting what AI agents can access or trust

Partially Connected – Some systems and data sources are integrated, but gaps still restrict Agentforce performance

Enterprise Ready – Data access, governance, and context layers are mature enough to support AI agents across business workflows

Scoring Guide

Response	Points
Disconnected	0
Partially Connected	1
Enterprise Ready	2

Maximum Score: 10

The Assessment

1. Enterprise Data Visibility

Can your teams easily identify and access the customer, operational, service, and business data needed to support AI-driven decisions?

- Disconnected
- Partially Connected
- Enterprise Ready

2. Agentforce Access to Enterprise Context

Can Agentforce access relevant information beyond Salesforce CRM records, including operational, support, product, and business systems?

- Disconnected
- Partially Connected
- Enterprise Ready

3. Salesforce Data Cloud Readiness

How effectively does Data Cloud help create a unified view of customers, interactions, and business activity across the organization?

- Disconnected
- Partially Connected
- Enterprise Ready

4. Data Access Architecture

Can AI agents securely access trusted enterprise data without requiring extensive replication, duplication, or manual data movement?

- Disconnected
- Partially Connected
- Enterprise Ready

5. Governance & Data Trust

Are governance controls, security policies, and data lineage practices in place to ensure AI agents use trusted and reliable information?

- Disconnected
- Partially Connected
- Enterprise Ready

Your Agentforce Readiness Score

Add your total score.

Score	Readiness Level	Interpretation
8–10	Enterprise AI Ready	Your organization has established the data foundation required to support Agentforce and enterprise AI initiatives at scale. Focus on expanding use cases and optimizing business outcomes.
4–7	Context Gaps Present	Core capabilities exist, but limitations in data access, integration, or governance may prevent Agentforce from delivering its full value.
0–3	Limited AI Readiness	Fragmented data, disconnected systems, and governance challenges are likely restricting AI performance.

What Lower Scores Typically Indicate

Area	Potential Impact
Enterprise Data Visibility	AI agents lack access to complete business context, resulting in weaker recommendations and decisions

Agentforce Context Access	Customer, service, operational, and revenue signals remain isolated across systems
Data Cloud Readiness	Customer profiles and enterprise data remain fragmented, limiting personalization and automation
Data Access Architecture	Data duplication increases costs, governance complexity, and the risk of stale information
Governance & Trust	AI outputs become harder to validate, explain, audit, and scale across the organization

Why This Matters

Most Agentforce performance challenges are not model challenges—they are data challenges.

As organizations move from AI experimentation to production deployment, success increasingly depends on whether agents can access trusted, real-time enterprise context. AI agents perform best when they can connect customer, service, operational, and business data without creating new silos or governance risks.

Organizations that invest in connected data foundations are better positioned to:

- Deliver more personalized customer experiences
- Improve decision quality across sales, service, and operations
- Reduce data duplication and integration complexity
- Maintain governance and compliance requirements
- Scale Agentforce and future AI initiatives with confidence

Next Step

Use your assessment results to identify where enterprise context, Data Cloud maturity, governance, and data accessibility may be limiting Agentforce performance today.

The organizations seeing the greatest value from Agentforce are not necessarily deploying better AI—they are providing AI with better enterprise context.

To learn how your organization can improve Agentforce readiness, contact V2Solutions at **info@v2solutions.com**.