



SOLUTION BRIEF

Quoting agent for CPQ / RevCloud / RevCloud Advanced

Agentforce Quoting Agent turns CPQ from a bottleneck into a competitive advantage—faster quotes, fewer errors, and more closed deals.

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Solution overview

Service name: Quoting agent for CPQ/ RevCloud / RevCloud Advanced

One-line outcome: Agentforce Quoting Agent turns CPQ from a bottleneck into a competitive advantage—faster quotes, fewer errors, and more closed deals.

Audience: RevOps, CRO/Head of Sales, CIO/IT (secondary)

Partners: Salesforce

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Solution snapshot

What it does:

Agentforce Quoting Agent is a Gruve AI-powered digital agent embedded in Salesforce CPQ that automates and guides the quote creation process—turning complex, error-prone quoting into a fast, conversational, policy-compliant workflow.

Why it matters now:

Deal complexity and compliance needs are at an all time high. Sales Reps need to ramp faster, be less of a load on managers and decrease QTC time. In the modern era, time is the killer of all deals. Prospects will abandon “shopping carts” and vendors if they are waiting for quotes to review and countersign.

Time to value: Go live in 4–8 weeks with small production pilot using existing product scenarios and super users/teams.

Typical ROI:

- 50–80% faster quote creation
- Fewer pricing & configuration errors
- Reduced discount leakage
- Higher rep productivity
- Faster deal cycles → higher win rates



50-80%

faster quote creation

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Core value

Primary outcome:

Quote to Cash (QTC) cycle time measurable reduction and fewer defective quotes that need to be reworked. More \$ on every deal booked.

Secondary outcomes:

Lower Sales Rep ramp time, compliance adherence, fewer deals needing human intervention and oversight.

Why Gruve:

Gruve pairs application modernization with agent adoption realities (data readiness, security, operational excellence) so “AI-ready” is practical—not aspirational. We also use structured assessments and roadmaps (including Gruve’s AI readiness micro-assessment) to benchmark your starting point and produce a clear, sequenced execution plan.

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Key benefits

Vs. Manual CPQ

Manual CPQ	Agentforce
Click-heavy	Conversational
Error-prone	Policy-enforced
Slow	Instant
Depends on experts	Scales automatically

Vs. Non-Salesforce AI Tools

Other AI	Agentforce
External	Salesforce-native
Limited context	Full CPQ data access
Generic responses	Business-rule aware
Security gaps	Salesforce trust layer

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How it works

Tier 1 / Feature 1: Modernization & AI-readiness assessment (blueprint)

Who it's for & what it includes:

For organizations that need a clear, defensible plan before rewriting anything. We baseline the code and architecture, quantify debt hotspots, and produce a prioritized modernization roadmap that explicitly supports AI agents and microservices adoption (including security/compliance considerations).

Core features included:

- App + architecture inventory (dependencies, integrations, critical paths)
- Instrumentation + observability baseline (logging/metrics/tracing recommendations)
- Dead code + duplication identification; hotspot analysis; maintainability scoring
- Spec-and-doc generation from code (e.g., Tessl-assisted spec-driven artifacts)
- Target-state architecture and “agent-ready” integration patterns (APIs, events, modular boundaries, access control) aligned to enterprise agent adoption needs
- Modernization roadmap: quick wins (2-4 weeks) + phased migration plan (quarterly)

Typical objections vs real-world scenarios:

❗ “Our reps, system admins, and approver personas already know CPQ.”

→ Great—Agentforce makes them faster and more consistent, especially on edge cases and complex deals.

❗ “We can automate this with rules.”

→ Rules don’t explain themselves or adapt. Agentforce combines rules plus reasoning and guidance.

❶ **"Is this secure?"**

→ Yes—Agentforce runs within Salesforce's trust, profiles, permissions, and data model.

❷ **"Will this replace sales ops?"**

→ No—it removes repetitive work so ops can focus on strategy, not cleanup. This allows your teams to focus on the important / edge case deals where humans are needed to review deals. Let AI handle the "daily drivers".

About Gruve

Gruve partners with leading enterprises to transform data into measurable business impact. Our team brings deep expertise in enterprise data architecture, AI and analytics strategy, cloud modernization, and organizational change. We combine technical rigor with business acumen, ensuring recommendations are both architecturally sound and executable within your organizational constraints. With proven success across financial services, healthcare, manufacturing, and technology sectors, Gruve delivers data and AI solutions that drive growth, efficiency, and competitive advantage.

Learn more at www.gruve.ai.