

# Guide to the Agentic Enterprise Model

A comprehensive overview of the Agentic Enterprise and its implications for marketing teams.

**Persona:** RevOps Leaders

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## Why this guide matters

- **Decode the Agentforce narrative.** We translate Salesforce's Agentic Enterprise announcements into practical guidance for lifecycle marketing teams that need verifiable guardrails—not hype.
- **Bridge strategy and enablement.** Each chapter pairs the "why" (business problem) with the exact artifacts we deploy when running Automation Flight Deck engagements.
- **Set expectations with stakeholders.** Use the included talking points, ROI calculators, and governance briefs to explain investments to CMOs, RevOps, and Compliance.

## Inside the guide

### 1. Foundations of the Agentic Enterprise

- Clear definitions of agents, copilots, and orchestrators—and how they map to SFMC, Braze, and Iterable workflows.
- Capability heat map showing which decisions can be automated today vs. those that still require human review.

## 2. System Design Blueprints

- Data-layer diagrams with required tables, sync cadence, and observability checkpoints.
- AI policy templates covering tone, disclosure, approvals, and audit logging.

## 3. RevOps + Lifecycle Use Cases

- Three end-to-end engagements (lead acceleration, lifecycle rescue, partner onboarding) with process maps, SLAs, and KPI formulas.
- Case studies summarizing business outcomes and the instrumentation used to prove them.

## 4. Maturity Assessments & Roadmaps

- Rubric to score your current state across data readiness, automation, AI trust, and change management.
- 90-day sprint plan mapped to roles, backlog, and expected telemetry.

## How to use it

1. **Run the maturity assessment.** Align leadership on the current stage and target state using the provided scoring worksheets.
2. **Pick a pilot.** Choose one of the pre-modeled use cases, duplicate the included backlog, and assign owners.
3. **Operationalize.** Deploy the guardrail checklists, QA prompts, and executive dashboards so every run has traceability.
4. **Scale.** Use the roadmap template to layer in additional agents or channels without rework.

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