

Generative AI Data Prep Checklist and Considerations



Use this checklist to plan your data strategy for generative AI. The considerations listed below can vary by use case and business needs.

Determine Goal	Use Cases	Review Data Cloud	Ethical Use of Data	Sources and Integrations	Analyze Data	Identity Resolution	Data Model Requirements	Unify Data
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1 Determine the Goal

Determine the business outcome that you want to achieve.

Complete the [AI Strategy](#) Trailhead module.

Get familiar with generative AI features.

Complete the [Agentforce Key Components: Quick Look](#) Trailhead module.

Complete the [Agentforce for Service](#) Trailhead module.



2 Define Your Use Case(s)

Align your use case to the AI capabilities that can help you achieve your goal.

Complete the [Agentforce: Agent Planning](#) Trailhead module.

Explore the [Salesforce Agentforce Use Case Library](#) or the [Salesforce AI Use Case Library](#) for generative AI use cases.

USE CASE

DESCRIPTION

FEATURES

STAKEHOLDERS



3

Review Data Cloud Requirements and Permissions

Understand why [Data Cloud](#) is needed for Agentforce implementation.

Understand [data usage types that impact Data Cloud billing](#).

Complete the [Data Cloud Credit Consumption: Quick Look](#) Trailhead module.

Understand [Data Cloud Limits and Guidelines](#).

Review permissions to [manage agents](#).

Review permissions to give [agent users](#).

Review the standard Data Cloud [permission sets](#).

4

Review Ethical Use of Data

Complete the [Ethical Data Use Best Practices: Quick Look](#) Trailhead module.

Understand [ethics, privacy, and consent](#) and its impact on customer data usage.

Understand Data Cloud Governance features such as auto-tagging and classification.

Complete the [Data Cloud Governance: Quick Look](#) Trailhead module.



5

Identify Data Sources and Integrations

Consider [data types and formats](#), including the structure of date/time data types.

Complete the [Unstructured Data in Data Cloud](#) Trailhead module.

Identify your [data sources](#) and datasets.

Evaluate the use of [connectors](#) and Zero Copy to bring in external data.

Complete the [Data Cloud Connectors and Integrations](#) Trailhead module.

Complete the [Zero Copy in Data Cloud](#) Trailhead module.

6

Analyze Your Data

Create a data inventory to help you manage diverse data assets.

See [Data Fundamentals for AI](#).

Evaluate your data readiness

Review the [Data Quality Trailhead module](#).

Review your data sources and audit your data.

Evaluate data quality. Consider data duplication, missing values, outliers, inconsistencies, and other issues.

Consider issues related to the variables you decide to use.

Determine the scope of your historical data.

7 Consider Identity Resolution

Evaluate if you need to use identity resolution to [unify customer profiles](#).

Complete the [Data and Identity in Data Cloud](#) Trailhead module.

Review [data modeling requirements](#) to use individual entity rulesets.

Identify what data is shared across sources (examples: email, first name, customer ID, and so on).

Plan out match and reconciliation rules.

8 Understand Data Model Requirements

Complete the [Customer 360 Data Model for Data Cloud](#) Trailhead module.

Learn about [data model concepts](#) and what to consider when building a data model.

Learn about [data model objects \(DMOs\)](#) in Data Cloud Reference Guide.

Understand [data model subject areas](#).

Understand [mapping](#) requirements.



Connect, Ingest, Cleanse, Model, and Unify Data

[Connect data sources](#) and ingest data into Data Cloud.

[Prepare and model data](#).

Resolve data quality issues such as cleanliness, relevance, ethics, bias, and efficiency.

Learn more in [Data Cleansing and Preparation](#).

[Unify data with identity resolution](#) to create unified profiles.

Identify what [insights](#) your agents need.

Set up Retrieval Augmented Generation (RAG)

Complete the [Retrieval Augmented Generation: Quick Look](#) Trailhead module.

Learn about the options for [RAG setup](#).

Implement RAG in Data Cloud or in the Agentforce Data Library.

Now that you prepared your data in Data Cloud, you're ready to start building agents! Continue in [Set Up Your Agent](#).

