



CASE STUDY & KNOWLEDGE GUIDE

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# Agentforce on Slack Enterprise AI in the Flow of Work

A governance-first case study for direct query, thread invocation, and live chat escalation across Salesforce and Slack operating environments.

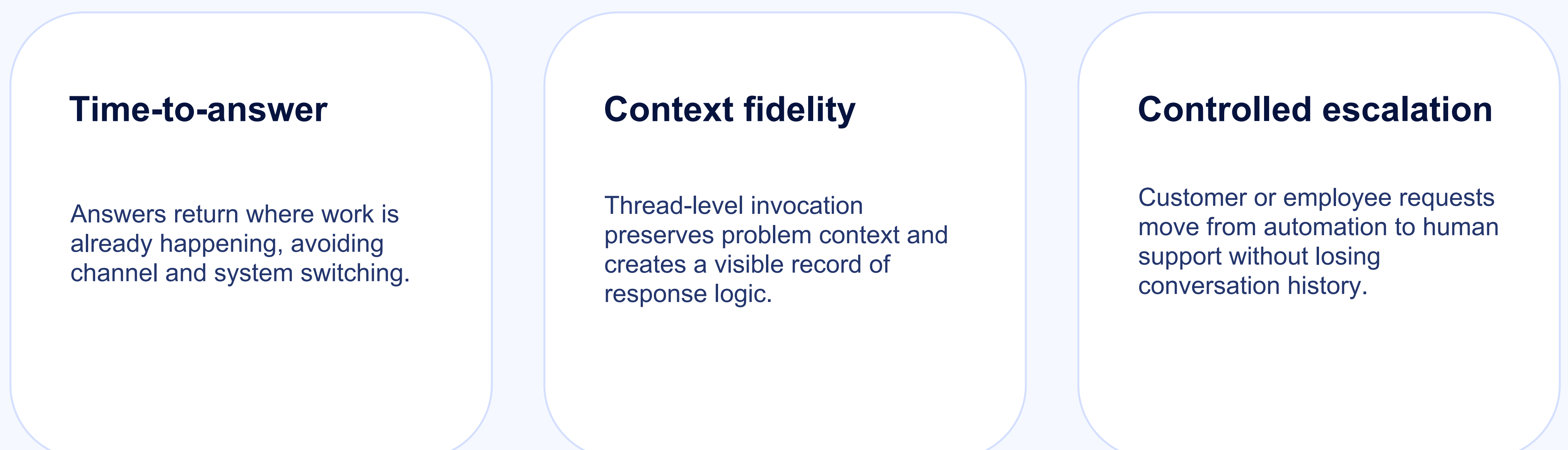
THE CXO QUESTION

# AI assistance without a new risk surface.

The Agentforce on Slack pattern reframes conversational AI as a governed operating layer. Employees stay in the channel where work already happens, while Salesforce remains the system of record for data, permissions, actions, and auditability.



## Executive value model

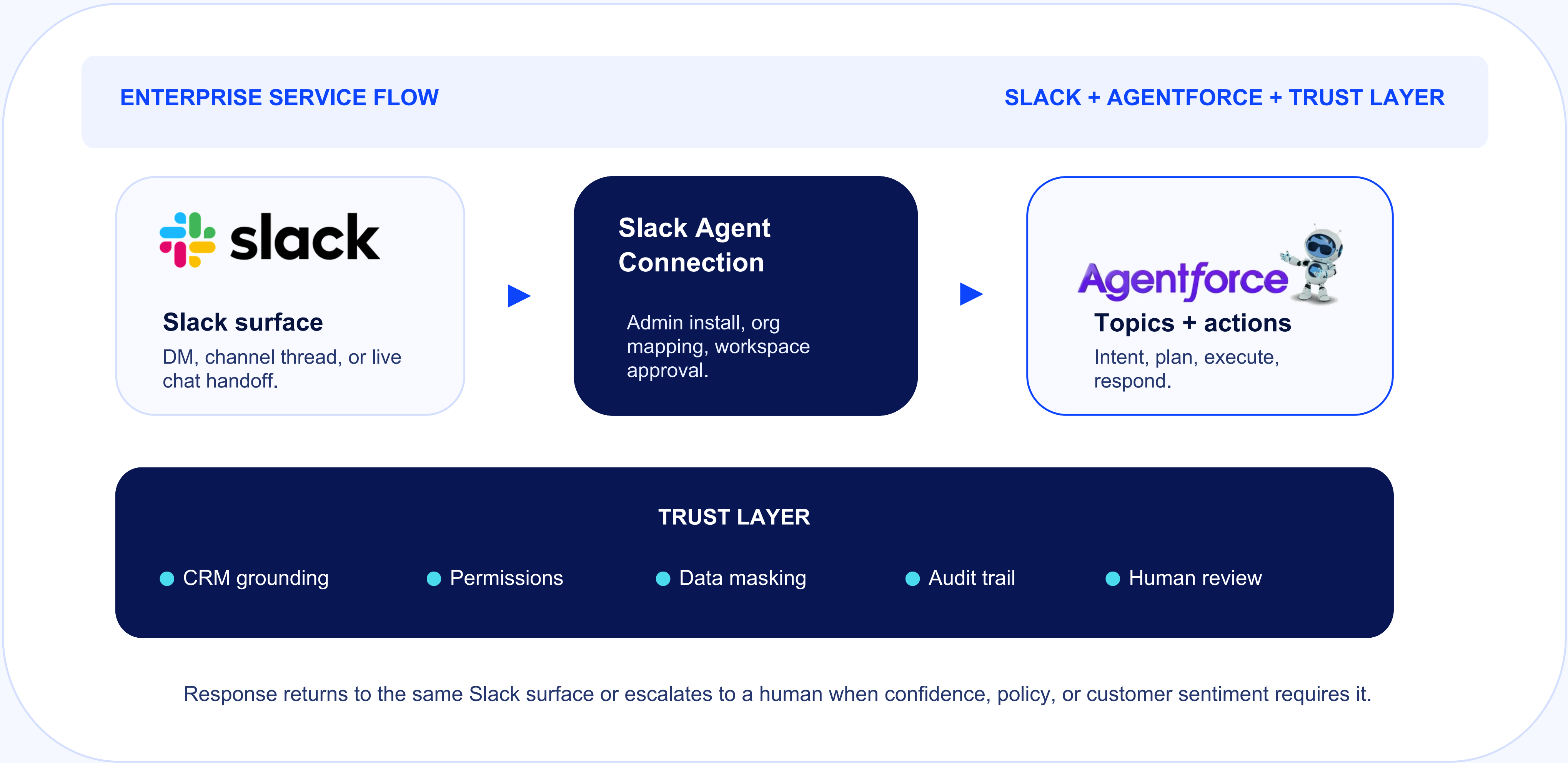


Source logic: Provided UX brief plus Salesforce and Slack official Agentforce-in-Slack documentation.

DEPLOYMENT MODEL

# Slack as the AI front door.

The solution pattern places Agentforce into the natural collaboration surface while retaining enterprise-grade control over data scope, permissions, topics, actions, and audit history.



## Governance controls that matter to leadership

| Control objective    | Implementation mechanism                                                   | Executive value                                              |
|----------------------|----------------------------------------------------------------------------|--------------------------------------------------------------|
| Access integrity     | Slack admin install, Salesforce org mapping, and role-aware member access. | Reduces exposure from unmanaged agent access.                |
| Answer integrity     | Ground responses in CRM, knowledge, and approved enterprise data sources.  | Improves trust in AI output and reduces unsupported answers. |
| Action governance    | Limit agent actions to approved topics, flows, APIs, and escalation paths. | Keeps automation within business policy boundaries.          |
| Continuous assurance | Track audit trails, feedback, escalations, and failure patterns.           | Creates an optimization loop for adoption and risk control.  |

References: [Salesforce Agentforce in Slack](#), [Slack Agentforce setup docs](#), [Salesforce Trust Layer developer guidance](#).

USE CASE BLUEPRINT

# Three operating motions in Slack.

The supplied UX brief maps the engagement model across direct query, thread invocation, and live chat escalation. The case study below converts those motions into business-operating patterns.

01  
Direct Query

Employee asks a service agent directly in Slack and receives the response in the same channel.

1

2

3

QuestionGroundAnswer

**BUSINESS VALUE**  
Fast self-service for repeatable internal questions.

02  
Thread Invocation

A team member mentions the agent inside an active thread so the answer stays with the issue context.

1

2

3

MentionRead contextReply in thread

**BUSINESS VALUE**  
No lost context between the problem and the answer.

03  
Live Chat Handoff

A site visitor requests human help and the conversation is routed to an internal Slack-based agent.

1

2

3

Bot limitRouteHuman resolves

**BUSINESS VALUE**  
Automation stops cleanly when empathy or judgment is needed.

## Decision matrix for CXO review

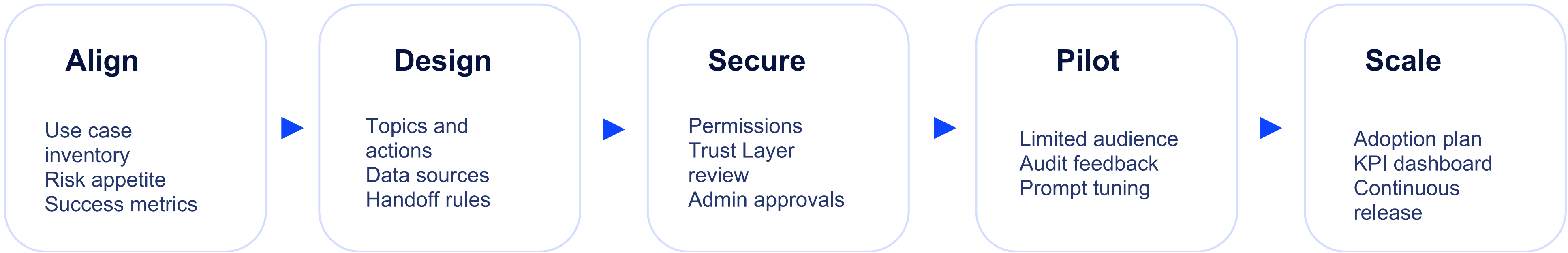
| Motion            | Best-fit use cases                                               | Primary governance question                                               |
|-------------------|------------------------------------------------------------------|---------------------------------------------------------------------------|
| Direct Query      | IT help, policy lookup, order/status checks, internal support    | Is the agent grounded in approved knowledge and user permissions?         |
| Thread Invocation | Delivery updates, case review, sales operations, incident triage | Can the agent interpret context without leaking thread data beyond scope? |
| Live Chat Handoff | Customer support, lead qualification, account assistance         | When does automation stop and the human path begin?                       |

ANTRAZAL DELIVERY LENS

# From demo to governed scale.

A production-grade rollout is not a chatbot launch. It is a controlled adoption program: start with high-confidence intents, limit the action surface, instrument outcomes, and scale only after proof of control.

## 90-day implementation roadmap



| Outcome               | Primary KPI                                           | Why it matters                                                         |
|-----------------------|-------------------------------------------------------|------------------------------------------------------------------------|
| Self-service adoption | Qualified queries resolved without ticket creation    | Measures whether Agentforce is removing avoidable demand.              |
| Speed to knowledge    | Median answer time and repeat-query reduction         | Shows whether teams are making faster decisions in Slack.              |
| Handoff quality       | Escalation completion rate and time to human response | Validates that automation does not trap complex or sensitive requests. |
| Governed action       | Approved actions completed without policy exception   | Confirms that automation remains inside defined operating boundaries.  |
| Trust and quality     | Feedback score, audit exceptions, and correction rate | Creates the control loop needed before broader enterprise rollout.     |