



CASE STUDY & KNOWLEDGE GUIDE

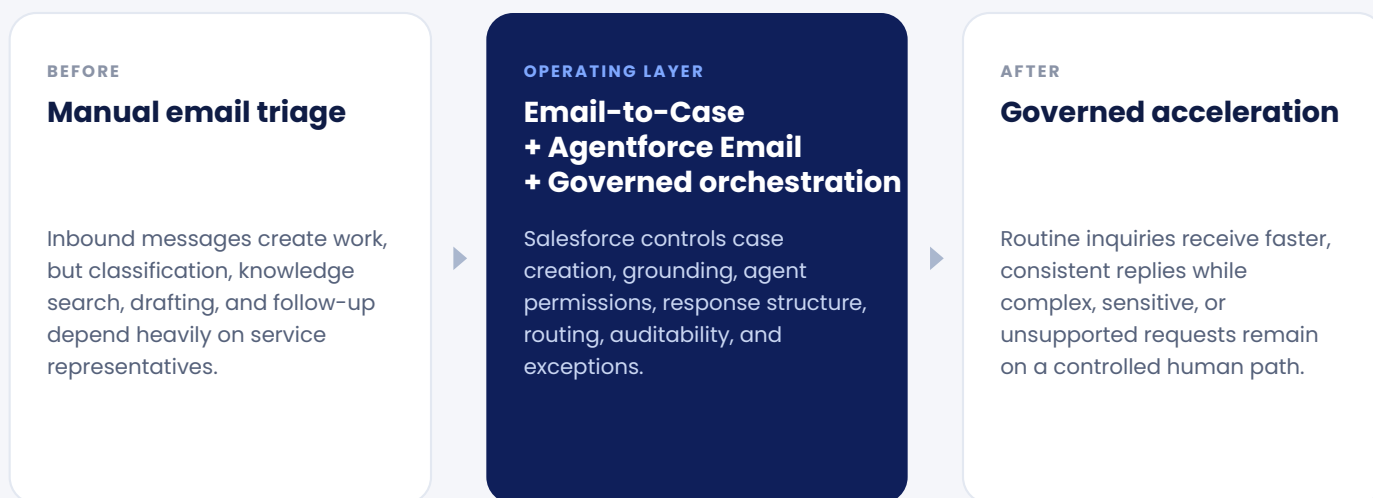
Agentforce Case-to-Email Governed AI Responses

A governance-first white paper for Email-to-Case intake, knowledge-grounded Agentforce responses, event-driven orchestration, and controlled customer email delivery.

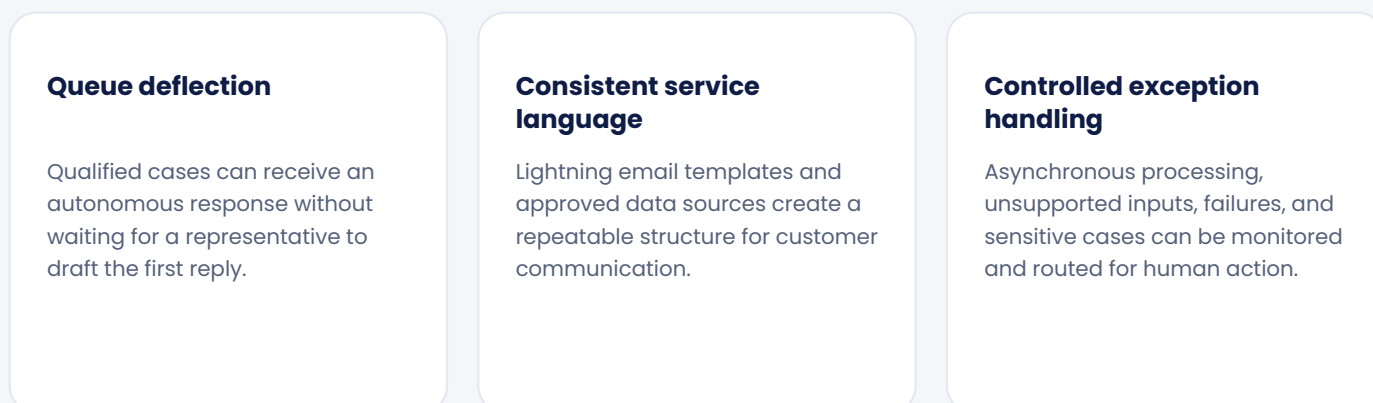
THE CXO QUESTION

Faster email service without losing control.

Email-to-Case turns inbound customer email into a Salesforce case. Agentforce Service Agent can then generate asynchronous, Data Library-grounded responses through an approved email configuration and template. Where custom orchestration is required, Apex and Platform Events can decouple the response workflow.



Executive value model

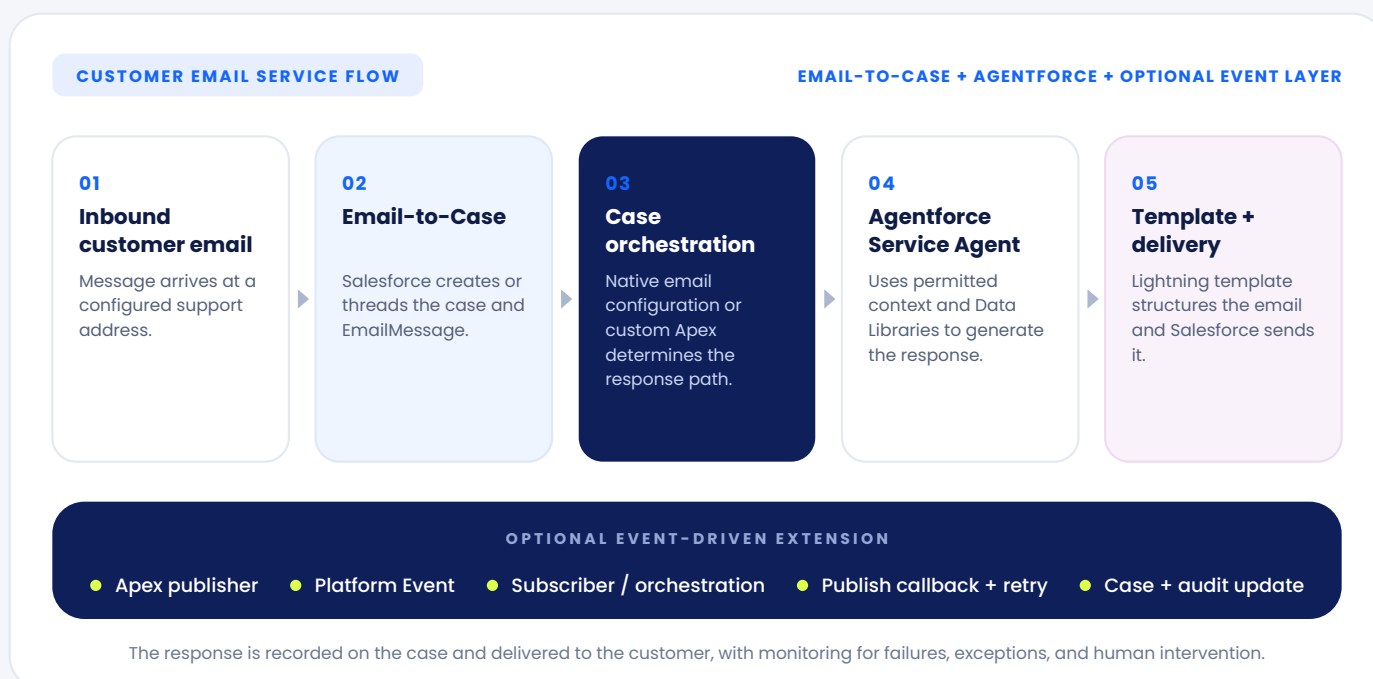


Source logic: Salesforce Help - Set Up Email-to-Case; Connect an Agent to Service Email; Create an Email Configuration for Agentforce Service Agent on Email.

DEPLOYMENT MODEL

A governed path from case creation to reply.

The core Salesforce pattern links an Email-to-Case routing address to an Agentforce email configuration and Lightning email template. Add Apex and Platform Events only when specialized enrichment or decoupled orchestration is required.



Governance controls that matter to leadership

Control objective	Implementation mechanism	Executive value
Intake integrity	Use verified routing addresses, secure threading, case ownership rules, and validated customer context.	Reduces lost, duplicated, or misrouted service requests.
Answer integrity	Ground the agent in approved Data Libraries and permitted Salesforce records; use defined agent instructions.	Improves consistency and lowers unsupported responses.
Event reliability	Bulkify publishers, track asynchronous publish outcomes, correlate failures, and define retry or dead-letter handling.	Prevents silent loss in custom event-driven processing.
Send governance	Use approved Lightning email templates, sender identities, monitoring, and human review criteria.	Protects brand, compliance, and customer trust.

References: Salesforce Help – Connect an Agent to Service Email; Create an Email Template and Email Configuration; Salesforce Developers – Platform Events and EventBus.publish guidance.

USE CASE BLUEPRINT

Three operating motions for email service.

The case-to-email model can be deployed as a native Agentforce email channel, an event-driven custom extension, or a controlled human-review path. The right motion depends on the risk, complexity, and required response logic.

01
Native autonomous response

A routing address is linked to an Agentforce email configuration and Lightning template. The agent responds using approved grounding.

1

2

3

CaseGenerateSend

BUSINESS VALUE
Best for high-volume, repeatable inquiries with reliable data and clear policies.

02
Event-driven orchestration

Apex publishes a Platform Event after case creation so a subscriber can enrich, sequence, or coordinate a specialized response.

1

2

3

PublishProcessUpdate

BUSINESS VALUE
Best when the response needs decoupled custom logic, multiple systems, or advanced controls.

03
Human review or exception

Low-confidence, sensitive, attachment-dependent, or failed cases remain with a service representative before email is sent.

1

2

3

DetectRouteReview

BUSINESS VALUE
Best where judgment, empathy, legal review, or unsupported content is involved.

Decision matrix for CXO review

Motion	Best-fit use cases	Primary governance question
Native autonomous response	Order status, appointment updates, policy guidance, repeatable support questions	Are the required facts available in approved data sources and safe for autonomous delivery?
Event-driven orchestration	Custom enrichment, multi-system coordination, delayed processing, specialist response assembly	How are event delivery, retries, idempotency, and final-send ownership controlled?
Human review or exception	Attachments, sensitive complaints, legal or financial issues, low-confidence or failed responses	What conditions stop automation, and what context must reach the service representative?

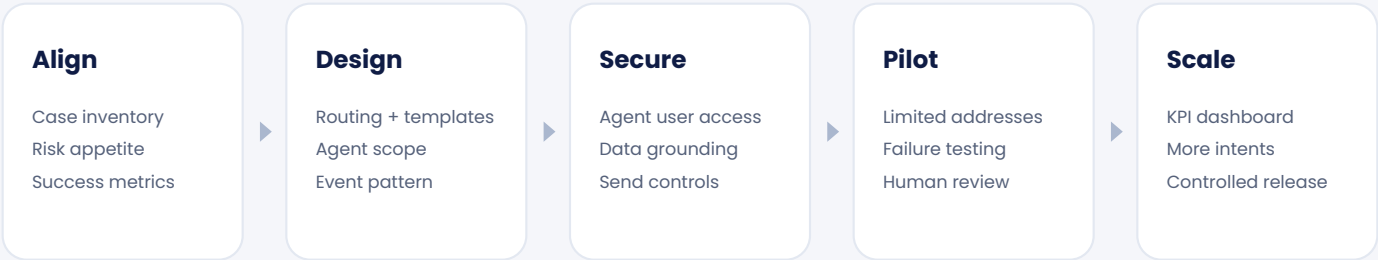
Design constraint: Agentforce Service Agent on Email processes the email subject and body text, not images or attachments; responses are asynchronous and should be monitored.

ANTRAZAL DELIVERY LENS

From response demo to governed scale.

A production deployment is not only an AI drafting exercise. It is a controlled service transformation: configure intake and threading, define response scope, secure data access, test asynchronous behavior, instrument exceptions, and scale after measurable proof.

90-day implementation roadmap



Outcome	Primary KPI	Why it matters
Autonomous resolution	Qualified cases answered without representative drafting	Measures whether Agentforce is removing avoidable response work.
Response speed	Median time from case creation to customer email	Shows whether asynchronous automation improves service responsiveness.
Grounding quality	Correction rate, unsupported-answer rate, and source coverage	Confirms that responses are based on trusted and relevant data.
Event reliability	Publish failure rate, retries, duplicate prevention, and completion rate	Validates the resilience of any custom Platform Event extension.
Exception quality	Human-review rate, escalation time, and context completeness	Ensures automation stops cleanly when a case requires judgment.

Official reference set: Salesforce Help - Set Up Email-to-Case; Connect an Agent to Service Email; Email Configuration, Template, Monitoring, and Considerations; Salesforce Developers - Platform Events and Apex publish guidance.