



CASE STUDY & KNOWLEDGE GUIDE

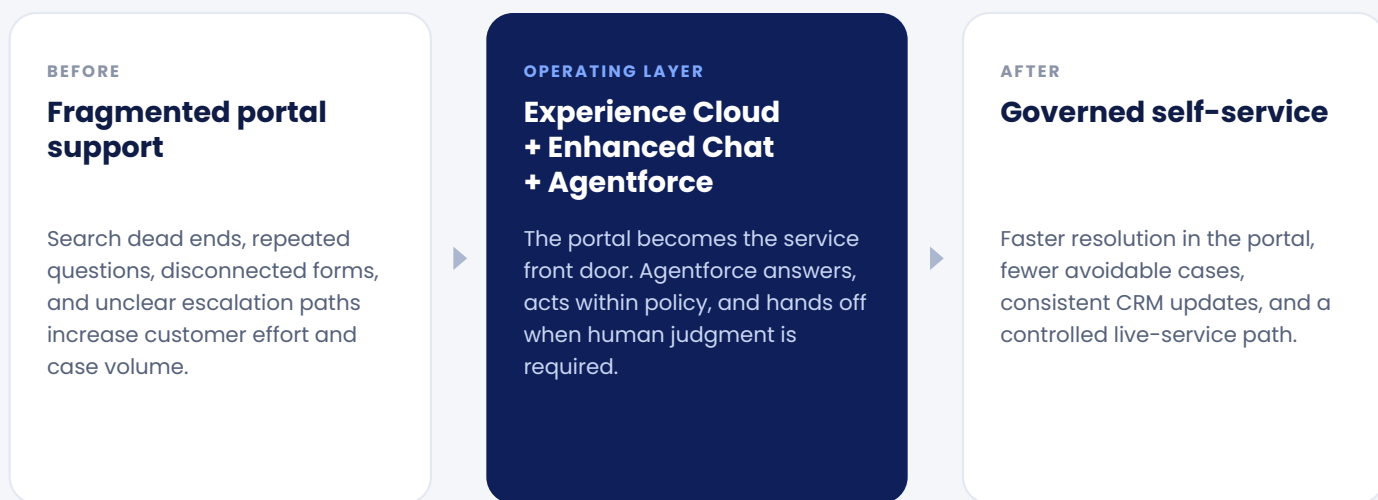
Agentforce on Experience Cloud Governed AI Self-Service

A governance-first white paper for knowledge-grounded answers, approved Salesforce actions, and controlled human handoff through Enhanced Chat and Experience Cloud.

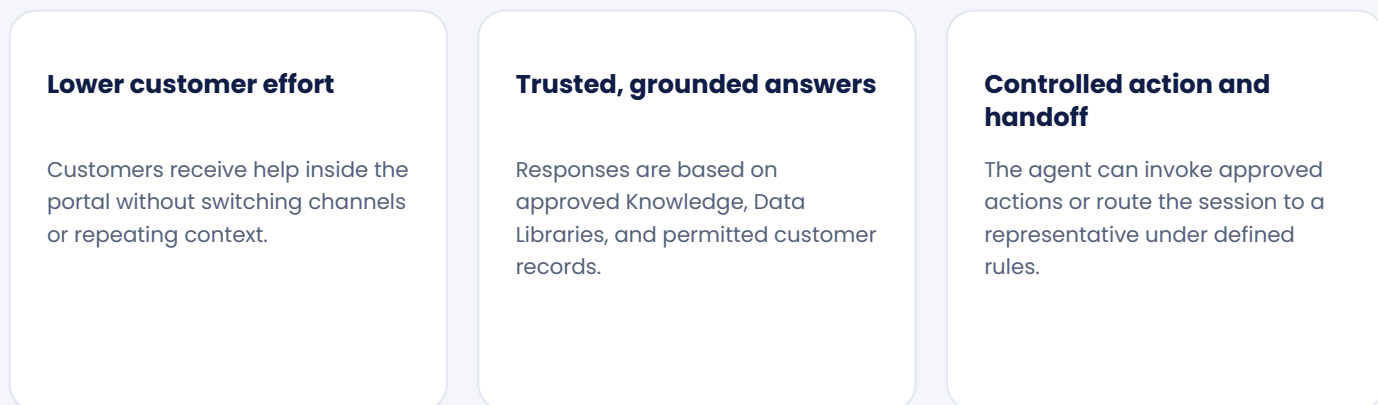
THE CXO QUESTION

AI self-service without a new trust gap.

The Experience Cloud pattern places Agentforce inside the customer portal while Salesforce remains the control plane for identity, knowledge, permissions, approved actions, routing, and the service record.



Executive value model

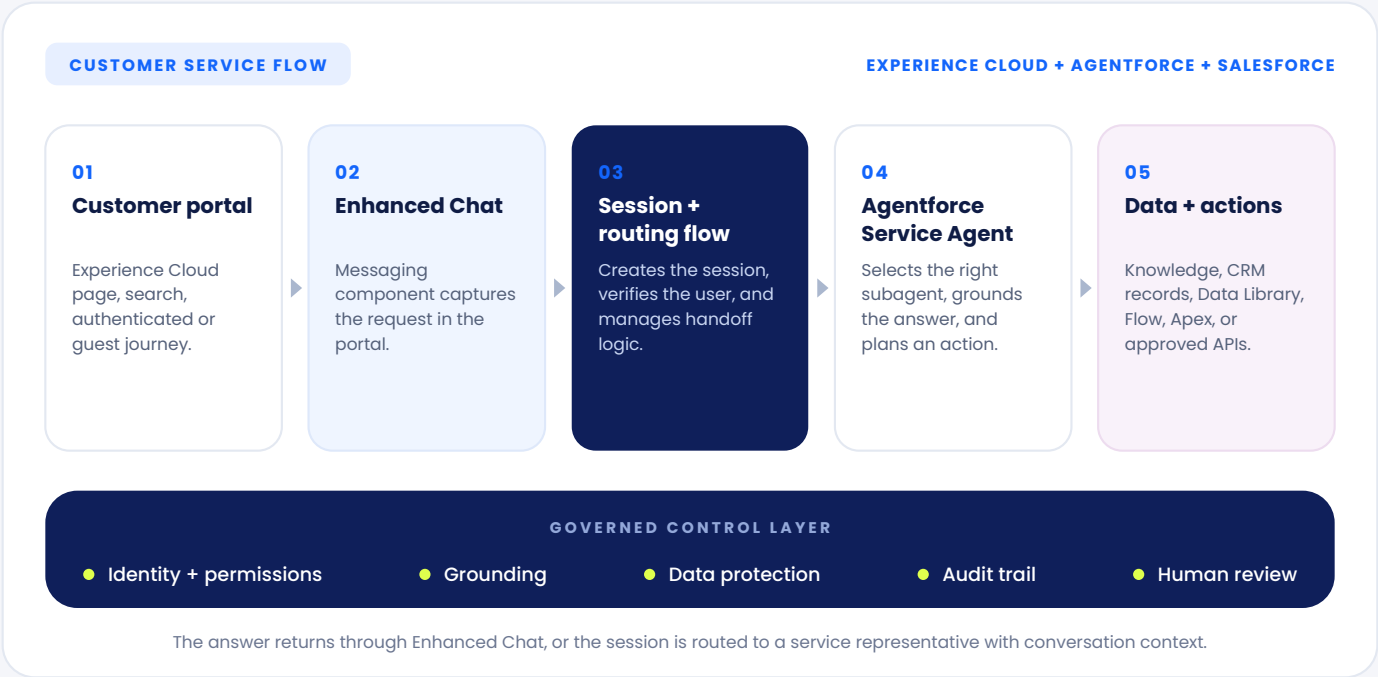


Source logic: Salesforce Help - Add an Agentforce Service Agent to Your Experience Cloud Site; Connect Your AI Agent to Customer Channels.

DEPLOYMENT MODEL

Experience Cloud as the AI support front door.

The reference pattern combines the portal, Enhanced Chat, a routing and session flow, Agentforce, and Salesforce data and actions. The response returns to the same portal surface or moves to a human path.



Governance controls that matter to leadership

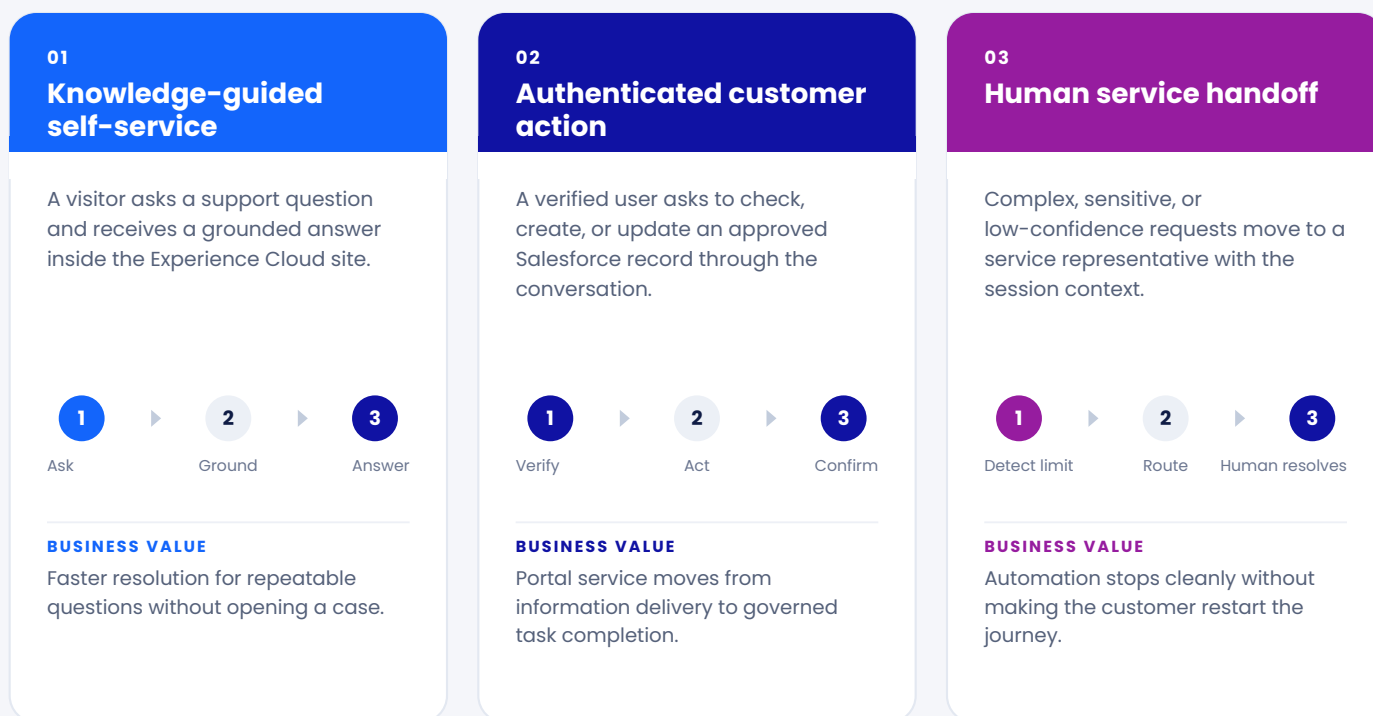
Control objective	Implementation mechanism	Executive value
Identity integrity	Use portal authentication, agent-user permissions, and verified session variables before sensitive actions.	Reduces unauthorized access to customer data or transactions.
Answer integrity	Ground responses in approved Knowledge, Data Libraries, and permitted Salesforce records.	Improves accuracy and reduces unsupported answers.
Action governance	Limit actions to approved Flow, Apex, named query, prompt, or API capabilities with least privilege.	Keeps automation inside defined business policy.
Routing integrity	Use inbound and outbound Omni-Channel flow logic for agent assignment and human escalation.	Prevents conflicting routes and preserves a reliable handoff path.

References: Salesforce Help – Connect Your Agent Using a Flow; Ground Agentforce in Your Data; Salesforce Developers – Build and Enhance Agentforce Actions.

USE CASE BLUEPRINT

Three operating motions in the portal.

The Experience Cloud service model can be organized into three repeatable motions: answer with trusted knowledge, execute an authenticated Salesforce action, or escalate with context when human judgment is needed.



Decision matrix for CXO review

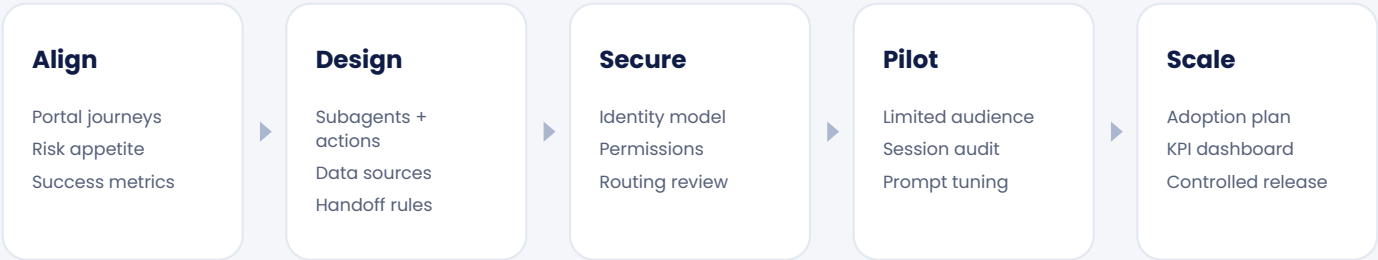
Motion	Best-fit use cases	Primary governance question
Knowledge-guided self-service	Policy lookup, troubleshooting, documentation, order or service guidance	Is the answer grounded in approved sources and filtered to the user context?
Authenticated customer action	Case creation, order or appointment updates, account requests, service forms	Which identity check, permissions, and confirmation are required before execution?
Human service handoff	Sensitive requests, exception handling, complex troubleshooting, complaint resolution	When must automation stop, and what session context must reach the representative?

ANTRAZAL DELIVERY LENS

From portal demo to governed scale.

A production rollout is not simply adding chat to a site. It is a controlled service program: define the journeys, verify identity and permissions, constrain the action surface, instrument outcomes, and scale after proof.

90-day implementation roadmap



Outcome	Primary KPI	Why it matters
Self-service resolution	Qualified conversations resolved without case creation or live transfer	Measures whether the portal is removing avoidable service demand.
Speed to resolution	Median time from first message to useful answer or completed task	Shows whether customers are reaching outcomes faster inside the portal.
Action reliability	Approved actions completed with valid identity, permissions, and confirmation	Confirms that task automation remains secure and predictable.
Handoff quality	Successful escalation rate and context completeness	Validates that complex requests reach a human without a broken journey.
Trust and quality	Correction rate, audit exceptions, feedback, and grounded-answer quality	Creates the control loop required before broader production scale.

Official reference set: Add an Agentforce Service Agent to Your Experience Cloud Site; Connect Your AI Agent to Customer Channels; Ground Agentforce in Your Data; Build and Enhance Agentforce Actions.