How to grow your small business with AI agents in Slack

Less Busywork, More Business: How Small Businesses Win Big with AI Agents in Slack

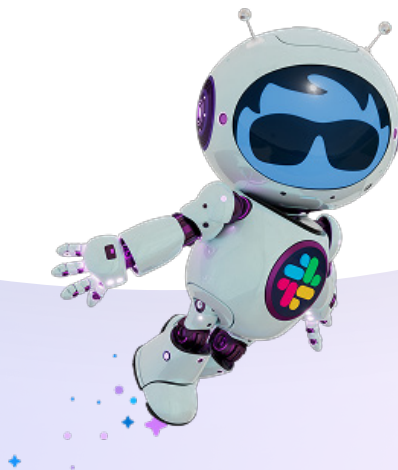**Sales Specialist**
Provides personalized sales coaching and offers resources to close deals.

# Contents

Introduction: Why AI agents, and why now

Speed is a small business's biggest advantage. Small teams make decisions faster, move quicker, and adapt with less friction. But as you grow, agility can slip. More employees, more tools, more complexity. What once felt like a sprint can turn into a trudge through clutter and miscommunication.

For small businesses facing big workloads with limited resources, AI agents offer a new and powerful way to keep that speed. While they don't replace the personal, creative edge that makes a small business special, they do remove the drag, taking on routine work, managing data, and connecting processes so your team stays fast and focused. They can update CRM records, assign support tickets, schedule onboarding sessions, and route approvals – freeing up your team to focus on real conversations, creative problem-solving, and a strong company culture as you take on more work and clients.

Importantly, AI agents now live in Slack. No new tools or complicated systems to learn. Just 24/7, actionable help where your team already loves to work.

That ease of use matters. When AI tools fit naturally into everyday processes, employees are more likely to adopt them and see real results. And adoption is accelerating: 71% of small businesses plan to increase their use of AI tools to gain efficiencies and automate routine work. Globally, IDC reports that 83% of companies are evaluating how to use AI agents to work faster and smarter.

This isn't about chasing trends. It's about achieving more with the same headcount, all without slowing down.
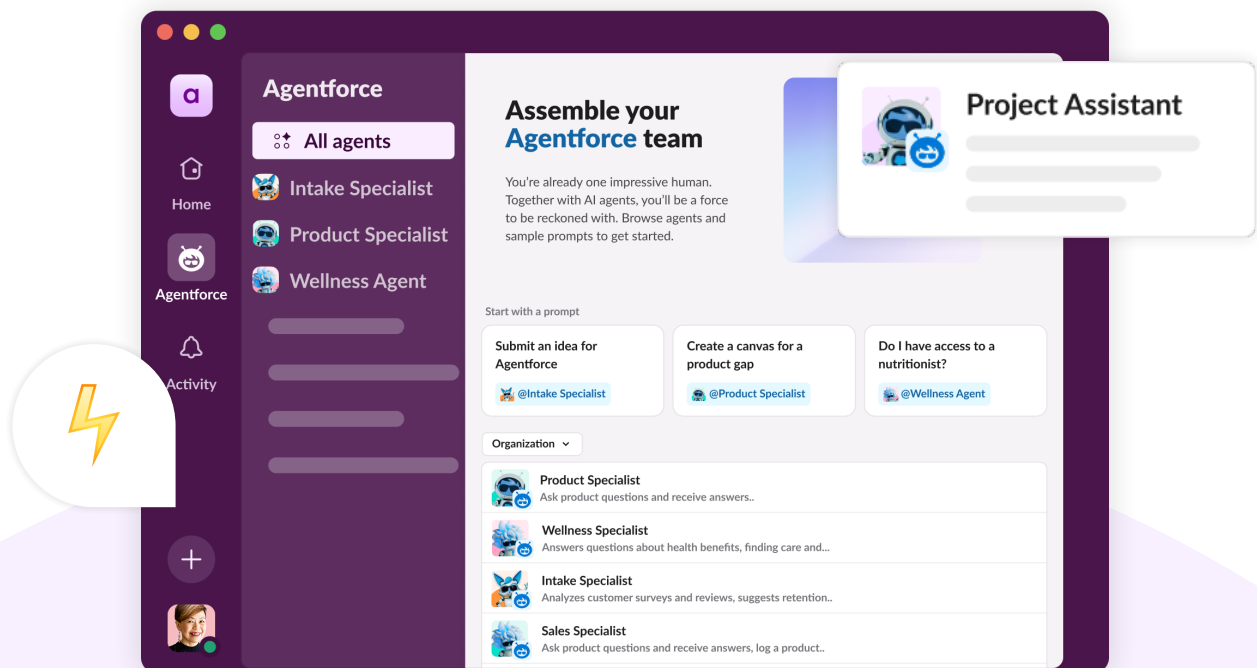
Chapter 1: What AI agents really are (and what they aren't)

Most people have used basic chatbots (scripts that answer simple questions) and large language models that generate text, code, or images. These tools help, but they still rely on humans to review, revise, and execute.

AI agents are different. They don't just suggest what to do. They act. Inside Slack, AI agents can connect directly to the data and tools your business already uses. This allows them to:

1 File and approve expense reports without human intervention

2 Draft sales plans based on real-time CRM insights

3 Provide customer support by answering questions from your knowledge base and escalating complex issues when needed

4 Update project status reports and assign follow-up tasks automatically

Where small businesses often lack the bandwidth for constant oversight, AI agents provide trusted, task-completing support. This frees your team to focus on the places where human judgment, creativity, and relationship-building are irreplaceable.

Not all AI agents are built the same. But Agentforce agents are designed with trust at the core. Built with strict security frameworks like the Einstein Trust Layer, Agentforce lets you deploy AI agents that are grounded in your business's real data, not random web content. They operate with permissions you control and can act autonomously or with human oversight, depending on the task. They show up in Slack like always-on teammates, ready to take action, not just give advice – and always within your set guardrails.

> **With AI agents, what once took four hours is completed in seconds with incredible accuracy.**
>
> **Vishrut Malhotra,**
> **CEO, Rexera**
>
> Rexera uses AI agents inside Slack to automate the collection, verification, and delivery of complex HOA paperwork.

Chapter 2: Where AI agents make the biggest impact

AI agents aren't generalists – they're specialists. And you can have as many of these specialists working with your employees, right inside Slack. The most valuable use cases for small businesses fall into a few key areas:

🚀 Sales

Sales teams lose a shocking 70% of their time to tasks unrelated to actual selling. To turn that around, AI agents can:

70%
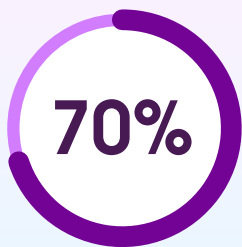
- Instantly update CRM records after a prospect responds

- Generate tailored proposals or discovery questions

- Surface upsell opportunities based on customer behavior

- Help qualify leads, schedule meetings, and follow up with potential customers

50% faster account planning, 50% more upsell bookings

Plative, a professional services firm, faced a challenge familiar to many small businesses: valuable time was being lost to manual sales processes. Account planning alone took up to eight hours per client per quarter, slowing down growth opportunities.

By integrating Slack AI, Plative connected its CRM, project management, and document tools into one centralized workflow. AI agents now automatically generate account plans and update customer insights in real time. As a result, Plative cut account planning time by half and saw a 50% increase in upsell bookings – all without adding new staff.

🗨 Customer service

Fast responses win customer loyalty, but meeting fast SLAs is only getting harder as products get more complicated and your customer base grows.

39%
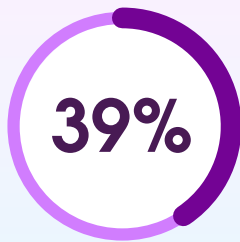
Reps spend only 39% of their time working directly with customers, and yet, a third of customer service engagements still end with unresolved issues. AI agents help small teams close that gap by:

- Handling a wide range of customer inquiries, from simple FAQ to more complex issues

- Providing 24/7 support and personalized assistance

- Escalating complex issues automatically to human agents

AI agents that keep deals moving across sales and customer service

Wahi, a digital real estate platform, set an ambitious goal: grow leads tenfold without growing headcount. To get there, they built Jean-Michel, a custom AI agent inside Slack. Using retrieval-augmented generation, Jean-Michel pulls real-time property updates and sends them directly to Realtors and clients.

Agents simply enter a property shorthand in Slack, and Jean-Michel handles the rest. Faster updates mean better client experiences and quicker decisions. Wahi's team can now focus on closing deals, while their AI agent keeps every conversation moving.

✉ Marketing

31%

Campaign testing, content generation, and data analysis often take weeks: Only 31% of marketers are fully satisfied with their ability to unify customer data sources. AI agents help small teams move faster by:

- Executing A/B tests without manual setup
- Adjusting ad spending in real time based on performance
- Suggesting campaign tweaks from live data trends

Marketing automation agents can also personalize campaigns, segment customers, and support lead generation, helping you reach the right audience and effectively convert leads.

For example, a small specialty coffee brand can use an AI agent in Slack to automatically set up and monitor A/B tests for email promotions, adjusting subject lines or images based on real-time engagement data. The agent can also track ad performance across platforms and recommend budget shifts toward the highest-performing channels.

▦ Operations and HR

Human resources is one of the most AI-ready areas for small businesses. AI agents can take on critical, time-consuming tasks that often pull teams away from strategic work. They can:

- Automate onboarding processes
- Set up accounts, deliver training materials, and schedule orientation sessions for new hires
- Schedule interviews and track employee engagement
- Help maintain compliance by monitoring key HR policies and workflows

To manage the full onboarding process, a small tech startup might deploy an AI agent to create email accounts, assign training modules, and coordinate orientation schedules. Agents can also assist with performance tracking, surface engagement trends, and even flag areas where additional support may be needed.

🏛 Finance

Managing finances can be one of the most time-consuming parts of running a business. AI agents can automate many of the most routine tasks, like:

- Scanning and categorizing expenses
- Automating bookkeeping and invoicing
- Generating audit-ready financial reports
- Tracking financial performance in real time

For example, a small consulting firm can deploy an AI agent to automatically generate invoices, track expenses, and prepare financial reports – tasks that would otherwise demand hours of manual work. The agent provides real-time insights into the firm's financial health, helping leadership make faster, more informed decisions.

> **Small businesses lose 24 days a year to financial admin.**
>
> **AI agents can help win that time back: Teams using AI agents spend 40% less time on admin compared to those who don't.**
>
> Sage research, 2025
> AI Agents are the Catalyst for a Limitless Workforce, Slack
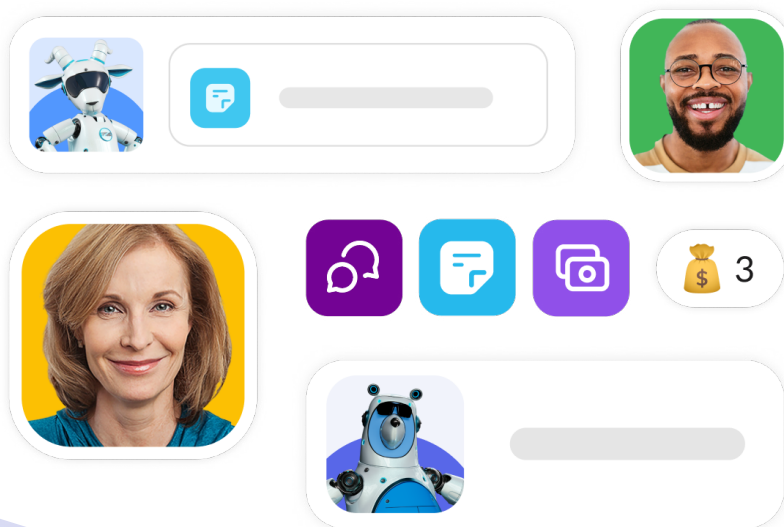
Chapter 3: How to get started using AI agents in Slack

You don't need a big budget, technical team, or months of planning to use AI agents. We already know one of the advantages small businesses have is the ability to move fast. The good news is, so can your AI rollout.

Slack gives you the foundation to build AI agents right into your daily work without needing to rip and replace your existing systems. And with Agentforce, you can deploy trusted, secure agents that connect directly to the tools and workflows your team already uses.

You'll want these three essentials to start:

① Trust and security

Before anything else, you need to know your data is protected. Slack is built with enterprise-grade encryption, granular admin controls, and strict compliance standards.
With [Agentforce](#), you can build and manage AI agents directly inside Slack, which means every agent operates behind the Einstein Trust Layer:

- Agents use data from your team's trusted sources to make decisions and recommendations

- Agents can't access information they're not permissioned to see

- There's no data retention after responses are generated

This is especially critical for businesses handling sensitive customer, financial, or HR data.

② Access to data

AI agents are only as good as the information they can work with. Slack makes it easy by integrating with the tools your business already uses: CRM platforms like Salesforce, support systems like Zendesk, storage tools like Google Drive, and project management apps like Asana or Jira.

The more connected your tools are in Slack, the more powerful your agents become. They can:

- Pull the latest customer records to update deal status

- Search knowledge bases to resolve support tickets

- Access employee data to automate onboarding steps

③ Flexible action

Slack's open ecosystem gives AI agents multiple ways to work. They can:

- Send messages and notifications in channels
- Update records in connected apps
- Route tickets or sales leads automatically
- Create tasks, kick off workflows, escalate issues automatically

All of this is possible through Slack's API, but you don't need to write code to benefit. With no-code tools like Workflow Builder and Agentforce templates, small businesses can automate work quickly and easily, right where teams are already working.

Getting started: Agentforce

Agentforce makes it easy to bring AI agents into Slack, whether you're starting with a template or building something custom for your team. Whatever you choose, agents are always designed with safety, permissions, and workflows in mind. You can:

- Choose templates for common tasks like lead routing, support triage, or onboarding
- Customize actions without developers
- Deploy agents directly into your team's Slack channels

Agents appear just like teammates. You can @mention them, chat with them, and they'll act based on real-time data from your systems
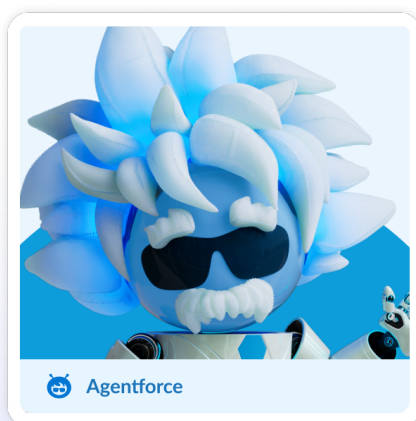
Agentforce

MIMIT uses Agentforce to save $200,000 annually

[MIMIT Health](), a healthcare provider, needed a better way to manage patient referrals and onboarding. Traditionally, recording details, scheduling appointments, and tracking new patients was manual with plenty of room for error.

By using Agentforce, MIMIT automated the entire workflow. Patient information, whether from email, phone, or web form, is entered once and instantly routed. Agentforce creates a lead in Health Cloud and a Slack channel where the care team can collaborate securely, all inside a HIPAA-compliant environment.

"Agentforce has revolutionized referrals, reducing manual effort while ensuring a smooth, secure, and efficient onboarding process," says founder Dr. Paramjit 'Romi' Chopra.

Already saving up to $200,000 annually, MIMIT is now expanding Agentforce to take on tasks like transcriptions, medical claims, and physician onboarding.

## Want to start even simpler? Try Workflow Builder

For businesses new to AI or automation, Slack's Workflow Builder is the fastest way to get started. It's a no-code tool that lets you:

- Drag and drop steps to create custom workflows

- Set up simple automation, like sending a welcome message to a new sales lead or routing a new IT request

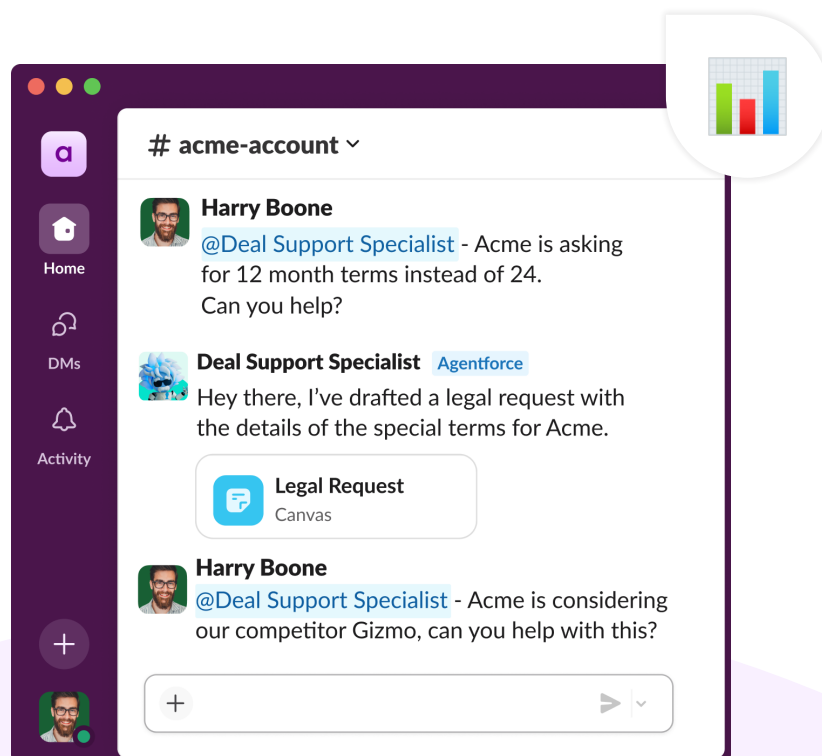- Use AI features in Slack to generate workflow templates automatically

Start small. Automate something simple like assigning inbound leads to sales reps, creating support tickets from customer messages, or sending daily standup prompts to your team. Each small automation frees up time and builds confidence for bigger AI agent deployments later.

The real gains: What SMBs get from AI agents

72%
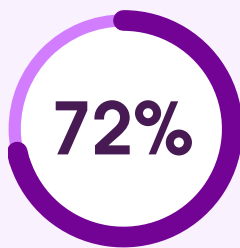
Across industries, small businesses are using AI agents to move faster and keep their teams focused. According to Slack's Workforce Index, **72% of employees who work with AI agents say they feel "very productive."** That means less time on repetitive tasks and more time on creative work and skill building.

acme-account ⌄

Harry Boone
@Deal Support Specialist - Acme is asking for 12 month terms instead of 24. Can you help?

Deal Support Specialist Agentforce
Hey there, I've drafted a legal request with the details of the special terms for Acme.

Legal Request
Canvas

Harry Boone
@Deal Support Specialist - Acme is considering our competitor Gizmo, can you help with this?

Chapter 4: Best practices for making AI agents work for you

Deploying AI agents is easy. Getting the most value from them requires deliberate choices. These best practices come straight from how top small businesses are already succeeding.

Start small and focused

Don't deploy agents across your entire business on Day 1. Instead, identify one specific workflow – something repetitive and time-consuming where the benefit will be obvious.

Take Plative: By automating account planning, they cut prep time in half and boosted upsells, without adding developers.

> **Tip:** Good first projects include CRM updates, customer ticket triage, or automating sales lead enrichment.

Build transparency and trust

Transparency builds trust in AI and strengthens your company culture. When employees understand how new tools fit into the big picture, it reinforces openness, collaboration, and shared success.

- Explain agent roles clearly: Agents automate the tasks that slow your team down – not the strategic, creative work humans do best

- Show what the agent does: In Slack, agents can report actions to channels so everyone sees the work happening transparently.

63%
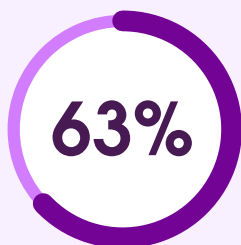
63% of workers say they trust AI more when it works alongside people — not instead of them.

2024 Salesforce research

Make experimentation a habit

AI agents thrive in companies where teams can experiment. The goal isn't to get everything perfect from the start, it's to learn fast:

· Hold "**demo days**" where teams show off how they're using agents

· Create a **#learning-AI** Slack channel to share tips, wins, and lessons

· Celebrate **fast failures**: Trying, learning, and adjusting will make your agents smarter, faster, and more effective

Companies like Canva encourage teams to test AI use cases freely rather than dictating a top-down approach, leading to faster innovation.

> **We've got learning programs run by our Canva University team that give people free rein to play and experiment.**
>
> **Samantha Garrett,**
> **Senior System Engineer, Canva**

Integrate your systems first

The more your agents can "see," the more powerful they become. Before deploying complex agents:

· Connect Slack to your CRM, ticketing systems, document stores, and HR tools

· Start with accessible data like customer records or support FAQs

61%
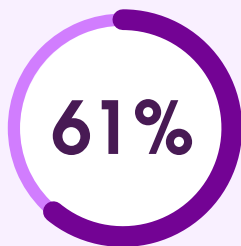
61% of companies see collaboration platforms like Slack as the hub where apps and data unify — making it easier for AI agents to act intelligently.

Metrigy's AI for Business Success: 2025–26 global study
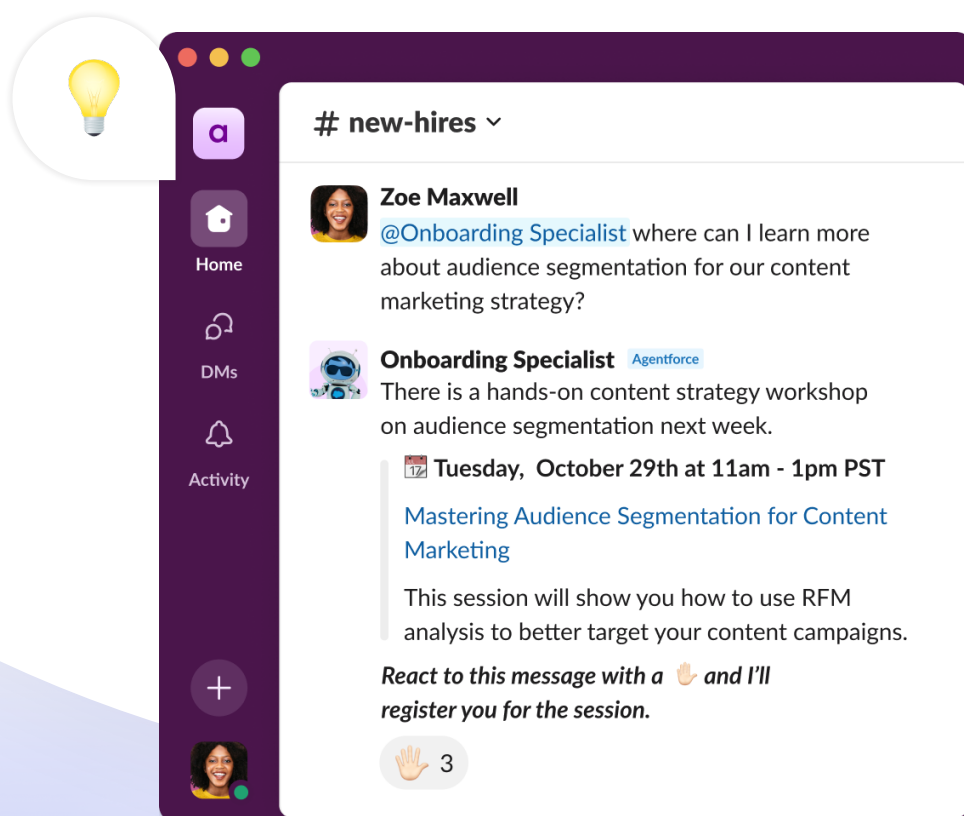
Invest in learning

One of the biggest challenges small businesses face today is [keeping pace with how fast technology evolves](#). **Gerald Kane**, Professor at the University of Georgia, calls this the "digital adoption gap," or the lag between how quickly technology advances and how slowly businesses adapt. "If we think that the speed of technological change is going to stop with AI, we're fooling ourselves," he said. "It's about having a growth mindset."

Kane's research found a clear business risk: Employees unhappy with their company's digital advancement are 30% more likely to leave within a year. Meanwhile, companies that offer digital upskilling, including training on tools like AI, see employees who are up to **15 times less likely to leave**.

For small businesses, even modest investments in training can pay off in retention, loyalty, and future-ready teams. Offer your team easy, free upskilling tools like [Salesforce Trailhead](#), and promote no-code tools like Workflow Builder to non-technical staff.

> ## Employees unhappy with their company's digital advancement are 30% more likely to leave within a year.
>
> [The 3 Tips You'll Need to Succeed in the Age of AI Agents](#)

new-hires ⌄

Zoe Maxwell
@Onboarding Specialist where can I learn more about audience segmentation for our content marketing strategy?

Onboarding Specialist Agentforce
There is a hands-on content strategy workshop on audience segmentation next week.

📅 **Tuesday, October 29th at 11am - 1pm PST**

Mastering Audience Segmentation for Content Marketing

This session will show you how to use RFM analysis to better target your content campaigns.

React to this message with a 🖐 *and I'll register you for the session.*

🖐 3

Chapter 5: Common concerns and how to handle them

Small businesses have fewer resources and less margin for error, so every new tool needs to work for your team, not against it. Based on real-world experience and research, here's how to address the most common concerns about AI agents.

1 "Will AI agents replace us?"

62%

No. AI agents don't replace people. They take over repetitive, rules-based tasks that drain your team's time and focus. They automate busywork like updating CRM records, routing support tickets, and processing forms so your employees can focus on closing deals, helping customers, and growing the business.

And employees recognize this: 62% of workers who expect AI to change their job believe their roles will become more strategic and creative.

2 "Is our data safe?"

Yes, but only if you choose platforms built for trust and security. Slack uses Agentforce and benefits from the Einstein Trust Layer to ensure:

- **Secure grounding**: Agents can only access the data they're permissioned to use

- **Zero data retention**: No third-party LLM retains your data after a response is generated

- **Audit trails**: Every agent action is logged and reviewable

AI agents in Slack inherit the same enterprise-grade security and privacy policies trusted by some of the world's most advanced companies – all without the complexity of setting up your own system.

3 **"Will it be too complicated to use?"**

Not with the right tools. Slack is designed for everyday users, not engineers. Tools like Workflow Builder let you create automations with simple drag-and-drop steps, no coding required. And Agentforce comes with ready-to-use templates for common small business tasks like:

- Assigning incoming leads to the right rep
- Routing support requests to the right team
- Automating account planning or ticket follow-ups

Plative built and launched their custom "Plaito" AI agent inside Slack with a small team and minimal coding – and used it to cut account planning time in half and boost upsell bookings by 50%. You don't need more developers. You just need a good use case and a little time.

AI agents: Your quick-start checklist

- ☐ Slack workspace with access to Workflow Builder and apps
- ☐ Agentforce enabled (for deploying AI agents securely)
- ☐ CRM, help desk, or document storage integration, like Salesforce, Zendesk, or Google Drive
- ☐ A simple, repetitive process to automate, like ticket routing or sales lead assignment
- ☐ Clear metrics for success (e.g., hours saved, time-to-response improved)
- ☐ A pilot team to test and refine workflows

Work smarter, move faster, keep clients happy

Small businesses thrive by staying fast, creative, and close to customers. But as work grows, so does complexity. AI agents help small teams maintain their speed and focus as they scale.

They don't replace what makes your business great – they protect it. With Slack and AI agents, teams can cut busywork, make time for what matters, and stay competitive without losing their edge.