How to Get Started with Agentforce in Slack

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Introduction

AI is challenging every leader to rapidly evolve their business, yet the very tools meant to make us more productive have created a foundation of disconnected technologies, processes, and people. Despite the push to embed AI across enterprise systems, a recent MIT study reports that 95% of AI pilots fail, driven largely by poor workflow integration and agents that deliver generic, low-value responses.

Slack addresses these gaps by giving AI the context it needs: bringing people, data, and tools into one connected workspace, and transforming conversations across channels, threads, and canvases into actionable institutional knowledge. This contextual foundation makes Agentforce markedly more relevant, insightful, and accurate – right where work already happens.

COMMUNICATION
5.6B
Messages sent weekly[1]

WORKFLOWS
30M
Workflows used weekly[1]

DATA
6.4M
Salesforce records shared into Slack monthly[1]

TOOLS
77K+
AI-powered apps deployed in Slack[1]

Teams using Slack see a 47%+ improvement[2] in productivity by spending less time switching between tools and more time working in a unified, context-rich space

Now, personalized AI meets you right where you work – understanding your role, your projects, and your conversations to deliver insights built around you. Let's explore how to get started bringing Agentforce to life inside your Slack platform.
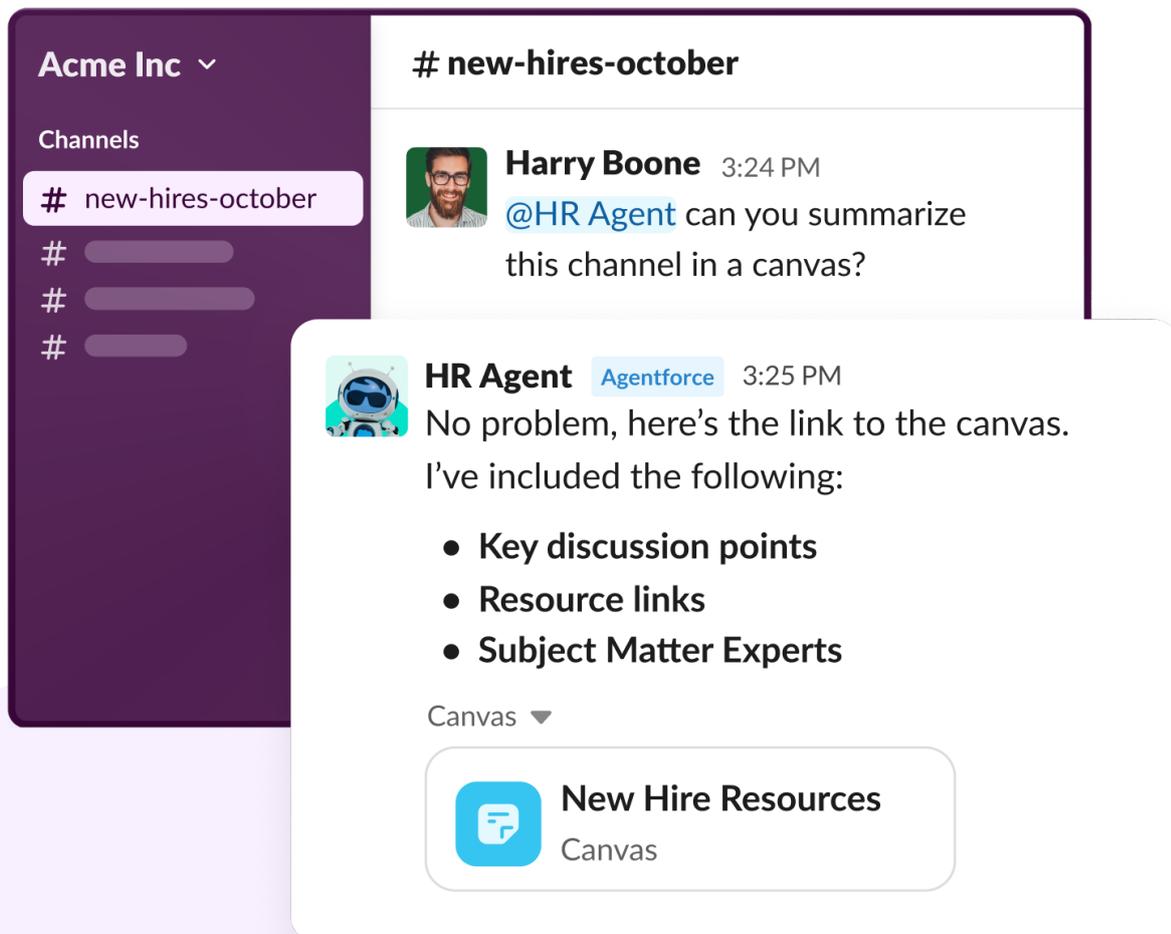
[1] Y25 Slack internal data, product usage analysis
[2] Slack Customer Survey 2024

Interact with agents just like any teammate

There's no need to log into another AI tool – Slack lets you bring agents directly into the flow of work. Plus, the platform's natural interface also allows you to interact with agents just like any teammate.

1 **DM an agent:** Start a private chat to request information, generate ideas, or get quick answers

2 **@mention an agent in channels:** Bring an agent into team discussions to provide a summary, share insights, or automate next steps

3 **Reply to agents in a thread:** Keep conversations organized by responding directly to an agent's message – questions, follow-ups, and actions can stay neatly in context

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Acme Inc ⌄

Channels

\# **new-hires-october**

\#

\#

\#

\# new-hires-october

Harry Boone 3:24 PM
@HR Agent can you summarize this channel in a canvas?

HR Agent Agentforce 3:25 PM
No problem, here's the link to the canvas. I've included the following:

- **Key discussion points**
- **Resource links**
- **Subject Matter Experts**

Canvas ▼

New Hire Resources
Canvas

Let agents take action on your behalf

Agents do more than answer questions. They can take action in Slack and Salesforce, saving you time and reducing manual steps in your day.

Ask an agent to:

1 **Find anything for you**: Use Slack's Enterprise Search to pull insights, files, or messages from across your organization

2 **Create and update canvases:** Have an agent start a new canvas for meeting notes or next steps for a project. It can even update an existing one with the latest context

3 **Create a channel:** Automatically create the right space for collaboration, complete with the right people, topic, and naming convention

4 **Send a message:** Draft or deliver updates to teams or channels without ever leaving your current conversation

5 **Create a project brief:** Have an agent generate a structured summary or kickoff doc using existing Slack messages or files

6 **Update objects in your CRM:** Instantly query, create, or update Salesforce records right inside the channel to bring insights into conversations, keep customer data current, and keep business processes moving

There's so much you can let agents handle so that you can focus on strategic or creative work.
Learn how to unlock greater productivity with agents.

> **By asking questions in a conversational form, Slack provides useful context and credible answers.**
>
> **Paul Kagoo**
> **GM of Enterprises & B2B, ReMarkable**
>
> **47,000**
> Searches
>
> **1,000**
> AI Summaries
>
> **3,000**
> Canvases

Have an always-on expert in every channel

Right out of the box, you can launch **Channel Expert** in just a few seconds. No setup or admin action is required if you're a channel manager. Channel Expert helps teams find trusted, personalized answers – powered by real-time Slack search and the content you choose, such as CRM data from Salesforce or other apps.

1 **Get instant answers:** Channel Expert fields repetitive questions and delivers accurate, approved responses grounded in channel-specific content and resources to ensure clarity around common team FAQs

2 **Save your experts' time:** It deflects everyday asks so your support, ops, and enablement teams can focus on higher-value work

3 **Stay current and trusted:** Each response is grounded in real Slack context and the sources you choose – ensuring it's always relevant

Get started launching a Channel Expert in our guide.
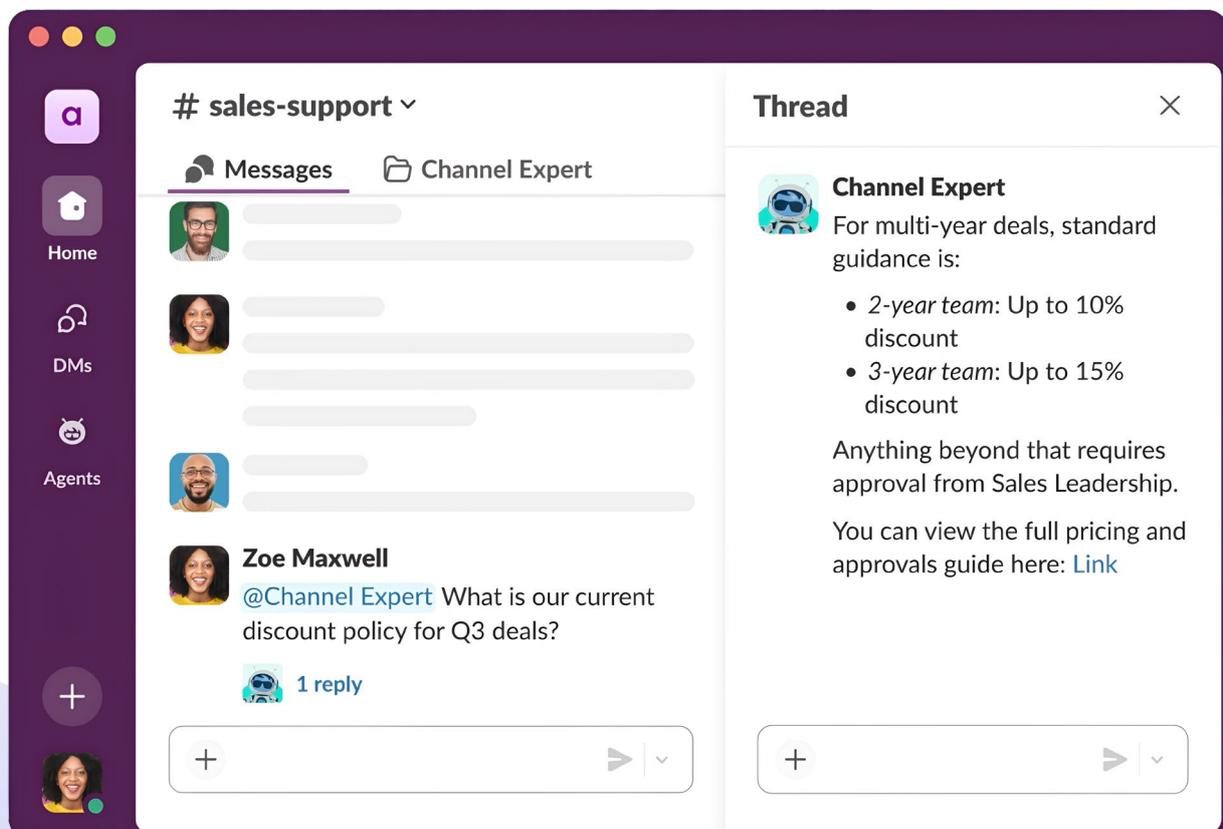
Launch specialized agents for every team

It can be challenging to get started with deploying agents without a solid foundation of use cases. That's where **Slack Employee Agent Templates for Agentforce** can help you get started building an agentic teammate that works for your team.

In Agentforce Agent Builder, you can find templates to get started building your own agents for:

1   **Employee Help:** Answers general FAQs using internal knowledge and public sites

2   **Analytics & Visualization:** Uses data, visualization, metrics, and reports to answer questions

3   **HR Service:** Automates leave requests, expense management, and direct deposits

4   **Pipeline Management:** Automates deal updates based on calls, meetings, and email data

5   **Onboarding:** Answers new employees' questions on internal policies and training

6   **Account Management:** Streamlines account research to guide the whole team right in Slack

7   **Marketing Intelligence:** Builds and shares on-demand insights and visualizations for campaign performance

8   **And more!**

Get started with Employee Agent Templates in our webinar.

> **Agentforce lets us connect workflows across systems. You ask a question in Slack, and the agent pulls from Box and Salesforce to deliver a complete answer. That's the kind of experience we want for our 115,000 customers.**
>
> **Aaron Levie**
> **CEO, Box**

Build agents for any job

Agent Builder gives you the tools to create custom agents for any use case. Built on the Salesforce platform, it lets you combine enterprise-grade data, logic, and workflows with the intuitive experience of Slack.

With Agentforce, you can design agents using:

1 **Prompts** grounded in enterprise data to deliver accurate, contextual responses

2 **Flows** to automate every process, from case creation to approvals

3 **MuleSoft** to connect any external system for a truly integrated experience

4 **Apex & JavaScript** to code custom actions unique to your business needs

5 **Actions** that update instantly in Slack workspaces, keeping everyone aligned

Embed real-time metrics into canvases to create a shared source of truth, ask agents natural-language questions for instant insights, and jump into deeper analysis in Tableau when you need to go further. No matter the job, you can build agents that work exactly the way your teams do. Get started developing a custom agent in our developer guide.
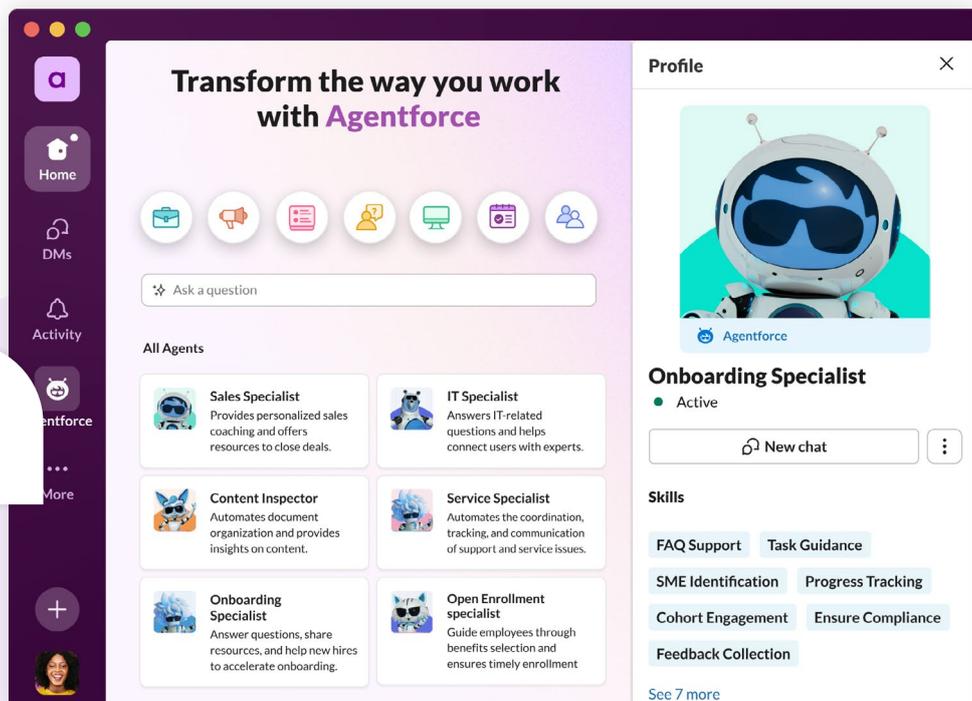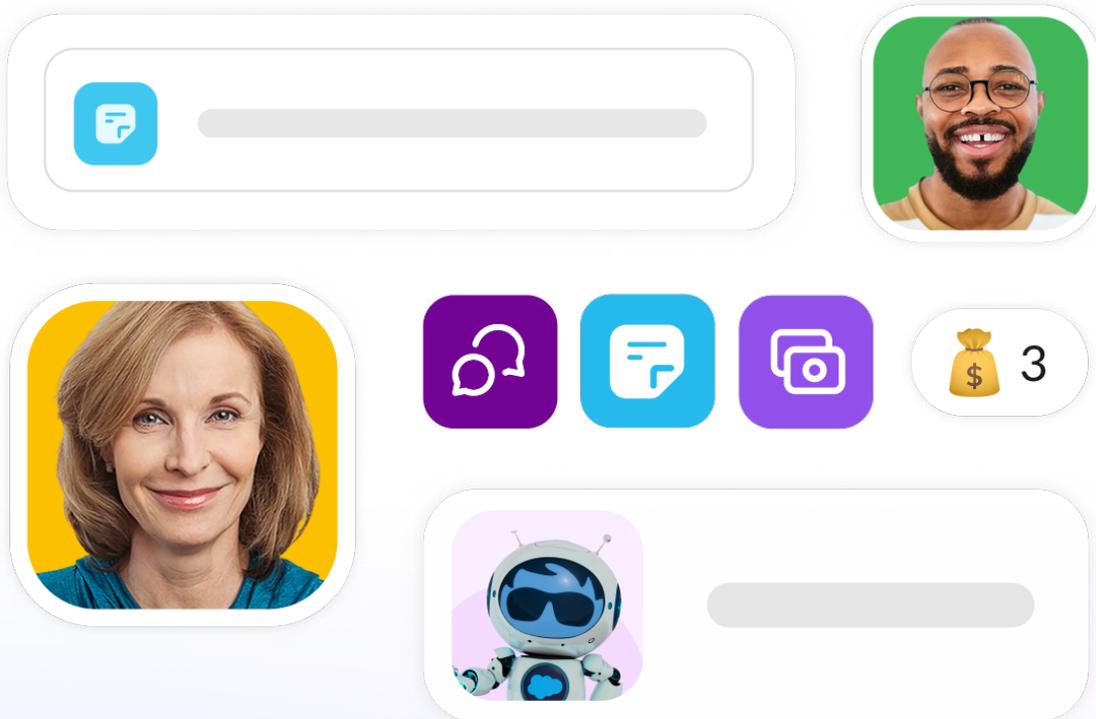
Unlock the power of Agentforce in Slack now

Slack is the best place to bring your agents to life – connecting people, data, and automation in one powerful workspace. To get started, take these next steps:

With Agentforce, you can design agents using:

1 **Connect Salesforce and Slack:** Bring your CRM data directly into Slack to empower agents with real-time information

2 **Install Channel Expert:** Launch the out-of-the-box Channel Expert across your channels right now to help answer questions and share insights instantly

3 **Build and deploy your own agents:** Use Agentforce to design custom agents that fit your organization's unique needs

Explore our collection of guides, demos, and tutorials to see how Agentforce in Slack can help your team work smarter from day one.