SALES AI USE CASE | PLAYBOOK

The CRM-in-Slack Playbook

How a fast-growing B2B technology company brought instant Salesforce insights into Slack with Agentforce and natural language.

Sales | Agentforce | Slack AI

TECHNOLOGY STACK

Salesforce Agentforce · Slack · Salesforce Sales Cloud (Leads, Accounts, Contacts)

EXECUTIVE SUMMARY

CRM answers where work already happens

The sales team spent its day in Slack, but every CRM question meant leaving the conversation to search Salesforce. Working with ABSYZ, a fast-growing B2B technology company integrated Salesforce Agentforce with Slack. Users now ask for lead details, record summaries or account information in natural language, and Agentforce securely retrieves the data, summarizes it with AI and replies right in Slack.

For sales reps
Lead and account details without leaving Slack

For the team
CRM context shared right in the conversation

For the business
Faster responses, with data kept secure

THE CHALLENGE

Two tools, constant switching

Finding the data

- **Constant context switching**
  Moving between Slack and Salesforce to look up leads, accounts and contacts broke focus.
- **Slow answers to simple questions**
  Even basic questions meant navigating records and related lists.

Sharing the data

- **Information overload**
  Full records held more detail than needed, making key points slow to find.
- **Fragmented collaboration**
  Teammates copied and pasted CRM details into Slack to share context.

INSIDE THE SOLUTION

From a Slack message to a CRM answer

1

Ask in Slack

A user asks Agentforce for lead, record or account information in plain language.

2

Understand

Agentforce interprets the request and identifies the records needed.

3

Retrieve securely

It retrieves the data from Salesforce securely.

4

Reply in Slack

AI condenses it into a concise answer, posted right in Slack.

What it looks like in Slack

Illustrative conversation; names are placeholders

sales-team

R **Sales Rep**
@Agentforce Get record details for [lead name]

A **Agentforce** APP
Here are the key details for [lead name]: company, status, source, owner and latest activity.

R **Sales Rep**
@Agentforce Summarize the account [account name]

A **Agentforce** APP
Summary of [account name]: industry, open opportunities, key contacts and recent activity.

R **Sales Rep**
How many contacts are associated with this account?

A **Agentforce** APP
[Account name] has [n] associated contacts. Want me to list them?

THE RESULTS

Faster answers, fewer tabs

Zero

app switching

to look up lead, record or account information

Seconds

to an answer

for common CRM questions, right in Slack

Up to 40%

less search time

spent finding routine customer information in Salesforce

One

workspace

for collaboration and CRM insights

Figures are indicative ranges for this type of solution. Actual results vary by business, data quality and adoption.

SELF-ASSESSMENT

Is your team ready for CRM in Slack?

Tick every statement that is true for your business today. Your answers can be saved with this PDF.

- [ ] Our sales team collaborates mainly in Slack.
- [ ] Reps switch to Salesforce several times a day just to look something up.
- [ ] Teammates paste CRM details into Slack to share context.
- [ ] Simple questions, like an account's contacts, take several clicks to answer.
- [ ] Reps skim long records when they only need the key points.

Ticked two or more?

Agentforce in Slack can likely give your team instant CRM answers without leaving the conversation.

The first question you'd ask Agentforce (optional)

LESSONS FOR SALES LEADERS

Four things to get right

01 Start with frequent lookups
Enable the questions reps ask most, like lead and account details.

02 Respect data access
Make sure answers follow the same permissions as Salesforce.

03 Keep answers concise
Summaries should surface key points, with a path to the full record.

04 Meet teams where they work
Bring CRM into Slack channels where deals are discussed.

Ready to bring Salesforce into Slack?

Talk to an ABSYZ expert about deploying Agentforce in Slack for instant, secure CRM insights.

Book a consultation

www.absyz.com

About ABSYZ: a Salesforce consulting partner helping businesses design, build and scale customer experiences across Sales, Service, Slack and AI.