EMPLOYEE AND INTERNAL OPS · AGENTFORCE EMPLOYEE AGENT

Policy & Handbook Q&A Agent

Answers staff questions about company policy directly from the handbook and policy documents, quotes the clause it used.

An Agentforce Employee Agent that answers staff questions about company policy directly from the handbook and policy documents, quotes the clause it used, and hands off to the policy owner when the documents do not cover the question. Fewer repeat questions to HR and operations, with every answer traceable to a document.



3	4	2	8
SUBAGENTS	ACTIONS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Policy answers
Policy questions answered from the library with a cited source.

Sensitive topics
Harassment, bullying, discrimination, whistleblowing and wellbeing. No policy summary, confidential contact given.

Policy owner handoff
Unanswered or personal questions logged and routed to the policy owner.

THE RULES IT FOLLOWS

- **Answer only from the Data Library**
  Never use general knowledge for policy.
- Never give legal advice or say what an employee is legally entitled to beyond the document text.
- **Every answer must carry a document name**
  If the grounding result has no source, return the "not covered" message.
- **Never reveal manager-only or salary information**
  Keep manager-only policies in a separate library that the agent does not use.

NOT INCLUDED

- Answering from policies that live only in email or chat.
- Legal interpretation of policies or local employment law.
- Multi-language policy documents.

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, Salesforce

RUNS ON
Agentforce, Data Library on Data 360, Slack for Salesforce

BEST FOR
Employees, new hires, team leads, HR teams and office managers

INDUSTRIES
Cross-industry · Professional services · Consulting firms · Agencies · Software companies · Healthcare practices · Nonprofits · Multi-site retail

WHAT YOU NEED

- ✓ Agentforce, Data 360 and Slack for Salesforce licenses in the org.
- ✓ Current policy documents and one named owner per policy area.

Coming soon. Designed in full and built to the same standard as the live agents.

Free scoping: a 60-minute review with an architect.

We map it to your org, your rules and your data, and give you a fixed plan before work starts.

salesforce PARTNER