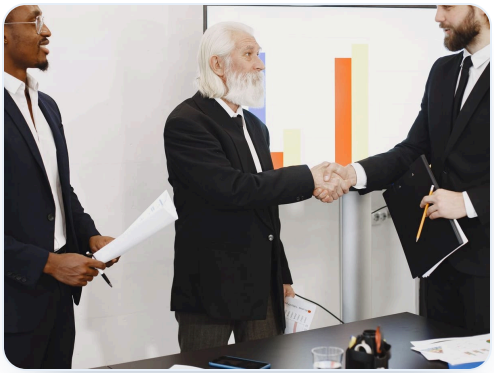
SALES AND REVENUE · AGENTFORCE EMPLOYEE AGENT

Post-Meeting Follow-up Agent

Turns a rep's dictated note or pasted transcript into proposed record updates, follow-up tasks and an email draft.

An Agentforce Employee Agent that turns a rep's dictated note or pasted transcript into proposed record updates, follow-up tasks and an email draft. Every write needs the rep's explicit accept. Call notes are in the CRM within a minute of the call ending.



3	6	6	2	8
SUBAGENTS	ACTIONS	OBJECTS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Capture meeting note
Reads the note and proposes changes.

Confirm and update
Writes accepted items.

Draft follow-up email
Drafts, never sends.

THE RULES IT FOLLOWS

- No record changes until the rep replies with an explicit accept for that item.
- Task due dates come only from dates in the note; otherwise ask.
- The email draft may not state prices, discounts or commitments that are not in the note.
- If the note mentions legal, HR or health matters, store nothing and tell the rep to log it manually.

NOT INCLUDED

- Call recording or transcription services.
- Sending emails automatically.
- Forecast changes and multi-account meetings.

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, Mobile app

RUNS ON
Sales Cloud, Agentforce, Salesforce mobile app

BEST FOR
Account executives, field sales reps, account managers, sales managers and customer success managers

INDUSTRIES
Cross-industry B2B · Software companies · Manufacturing · Medical devices · Distribution · Professional services · Financial services · Commercial real estate

WHAT YOU NEED

- ✓ Salesforce mobile app with Agentforce enabled.
- ✓ Your sign-off on the email tone and stage list.

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