AGENTFORCE AGENT · SALES AND REVENUE · NOVEMBER 2026

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.



STATUS
COMING SOON

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, Mobile app

CONTACT
contact@synconai.com

salesforce PARTNER

THE JOB IT TAKES ON

What the Post-Meeting Follow-up Agent takes off your team.

WHAT IT DOES

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.

WHAT CHANGES

Call notes are in the CRM within a minute of the call ending.



WHO USES IT Account executives, field sales reps, account managers, sales managers and customer success managers

WHAT IT DOES

Everything the Post-Meeting Follow-up Agent handles.

01

Capture meeting note

Reads the note and proposes changes.

02

Confirm and update

Writes accepted items.

03

Draft follow-up email

Drafts, never sends.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 No record changes until the rep replies with an explicit accept for that item.

02 Task due dates come only from dates in the note; otherwise ask.

03 The email draft may not state prices, discounts or commitments that are not in the note.

04 If the note mentions legal, HR or health matters, store nothing and tell the rep to log it manually.

TESTED BY REPLAY Scripted conversations, including the awkward ones, are replayed against the records they should create before go-live and before every change.

DELIVERY

Scoped with you, built in your org.

1

Scope with you

The actions it needs, the rules it follows and who approves what, in a fixed plan.

2

Build in your org

The agent, its Apex actions, objects and screens, as deployable Salesforce metadata.

3

Test by replay

Your own conversations replayed against your records before go-live.

4

Go live and hand over

A runbook, the test set and a walkthrough, so your team owns it from day one.

Deployable source
The agent, actions, objects and screens as Salesforce metadata.

Solution design
A Solution Design Document with UML for your architects.

Test suite
Apex tests plus replayed conversations, run before every release.

Least-privilege access
Permission sets for the agent user and for your staff.

Runbook and handover
How to run it, change its rules and roll back.

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

NEXT STEP

Get the Post-Meeting Follow-up Agent scoped for your org.

A free 60-minute review with an architect: what it would do in your org, what it needs and how long it takes.

EMAIL

contact@synconai.com

THE AGENT

synconai.com/ai-agents/post-meeting-follow-up-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER