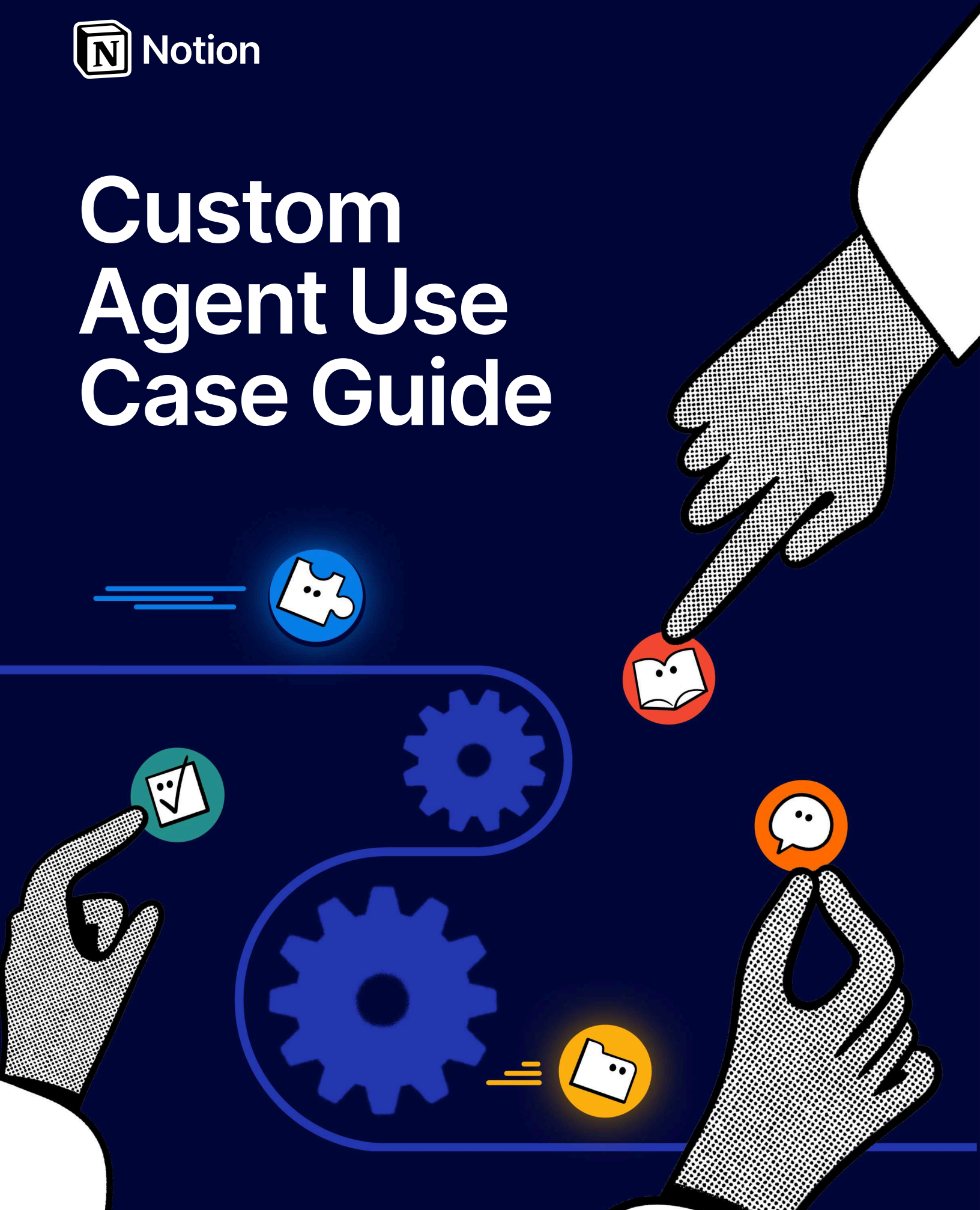
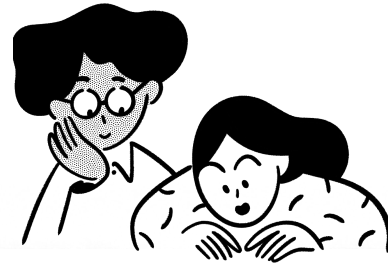


# Custom Agent Use Case Guide






# Three ways to automate your team's busywork

A guide to beating repetitive work with Custom Agents in Notion



In this guide, we'll show you how Custom Agents:

-  Answer **repeat questions** instantly
-  **Route and prioritize incoming tasks** without manual triage
-  Generate **status reports automatically** on your schedule

All while shifting teams from **repetitive busywork** to **focused, high-impact work**.

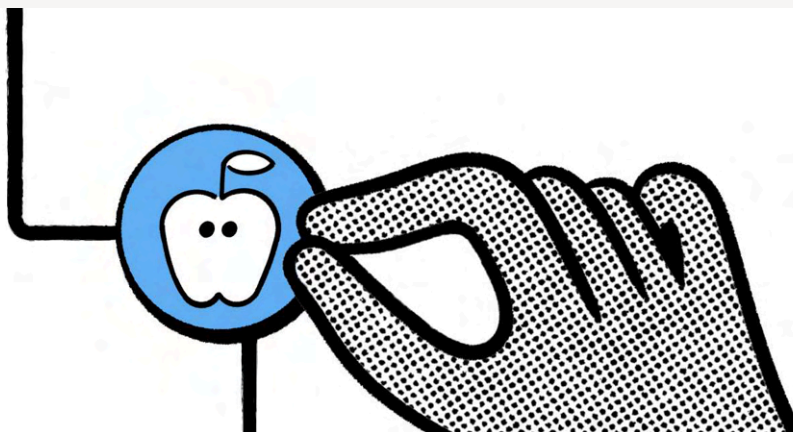
Your team is probably like most these days: **Buried in busywork**.

You know the kind. Answering the repeat questions that get asked ten times over in Slack, or managing the tasks that flood in faster than you can triage them, or writing the status reports that eat up entire afternoons

Everyone's already working hard enough at their day-to-day jobs, but they have to burn precious time and mental acuity on the important yet time-consuming manual tasks.

But with **Custom Agents** in Notion, you now have AI teammates that take on the repetitive workflows so you can get back to the things that matter, like building, solving, and creating. There are a near infinite way to use them, so where should you start?

Here are some examples of the most powerful Custom Agents teams are building to shift from busywork to real work.



# Answer repeat questions instantly



People ask the same questions over and over (and over) again:

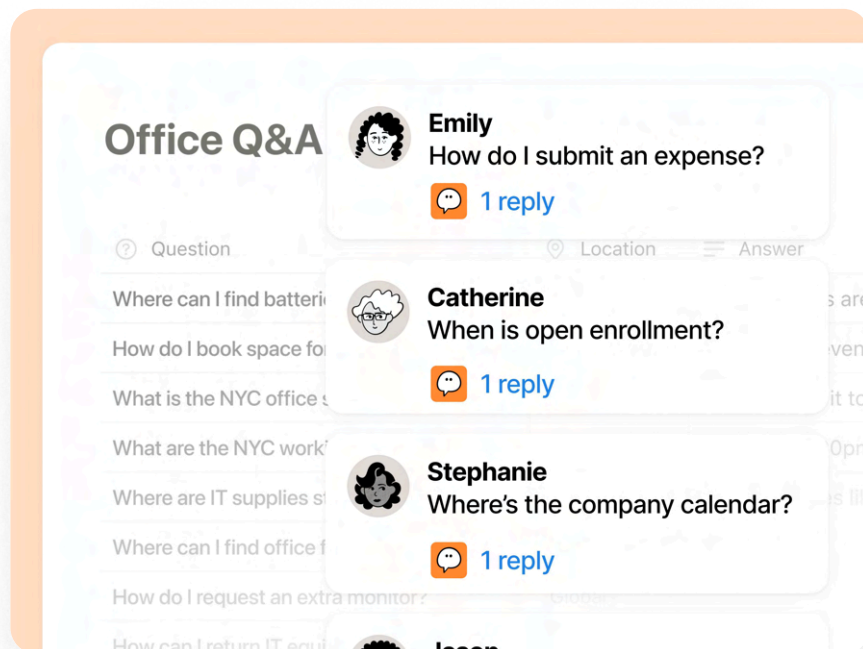
- “What’s our pricing model?”
- “How do I submit expenses?”
- “When are we officially launching that feature?”

You and your team have the answers. But when they’re buried in docs from six months ago, that one Slack thread last week, and help articles from your website, it takes too much time to track them down and write up a response.

With Custom Agents, you can answer questions instantly using the information you already have, no matter where it lives. Whether people ask a question in Slack or directly in Notion, they’ll get a response with citations. Instead of creating new content to answer questions, you’re making use of the content you already have.

**“Our Product Question Agent answers dozens of nuanced questions a day with a high success rate.”**

— Ben Levick, Ops & Internal AI, Ramp



## Q&A agents answer questions using existing info



### Product managers can route questions to an always-updated FAQ doc.

- Engineering, Marketing, and Customer Support are all asking why Product made a decision to build a feature the way they did. Thing is, it's already documented in the doc the team wrote three weeks back.
- Now, when someone asks “Why did we do that?” a Custom Agent replies with the answer and context on why. Your team may not even see the question come in.



### IT and HR teams can stop answering the same policy questions.

- Teams field the same questions about resetting passwords and time off policies hundreds of times a quarter. Each time, it requires someone pause work, type up and send a response, then spend the next five minutes trying to get back into flow state.
- Now, a Q&A agent replies to people in Slack with a step-by-step guide on how to reset their passwords and how much time off they're allowed this quarter. Flow state still flowing.



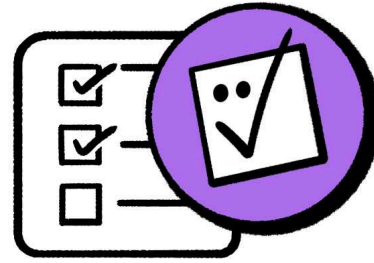
### Sales and Support teams can get consistent answers without waiting on specialists.

- Imagine this: A sales rep is on a call and is asked about the product roadmap. They post about it in the #ask-product Slack channel but don't get a response for three hours. The call ends without an answer, and the rep now has to follow up later—an endless back-and-forth email chain trying to get an answer.
- Instead, the rep can ask the Product Roadmap Custom Agent in Slack. It pulls from the latest Notion doc updated last week and quickly replies with a timeline.

What's the payoff? The time saved is nice, but it's also about **consistency** and **accessibility**. Everyone gets the same answer, so there's no more conflicting information because different people answer questions differently. And answers aren't bottlenecked by someone's calendar—the team is unblocked at 10am on Tuesday *and* midnight on Saturday. Whenever they need information, it's available. You can focus on new problems. Repeat questions handle themselves.



# Meet your task routing agent



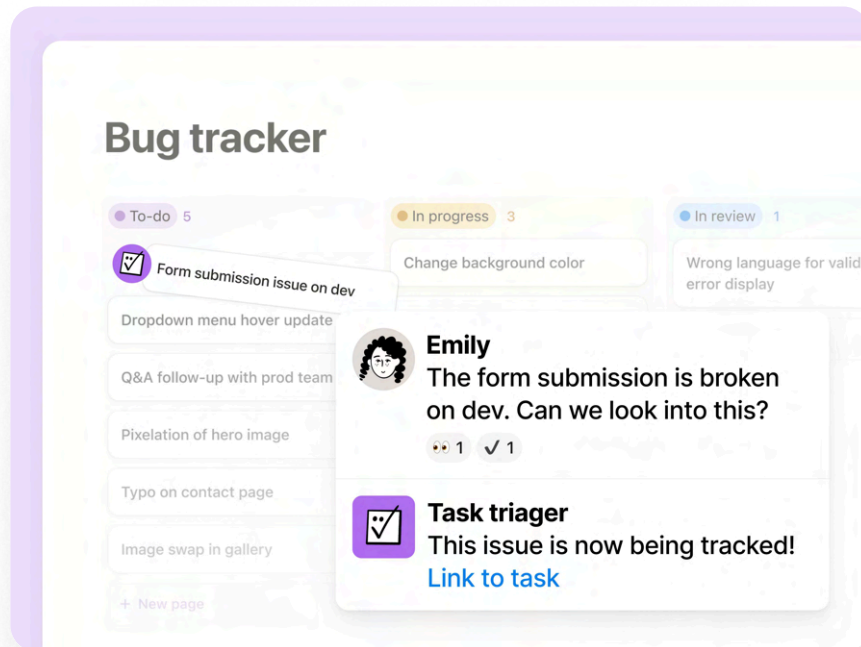
Every team has a version of inbox chaos. For Product, it's bug reports and features requests. For Customer Support, it's tickets and escalations. For Marketing, it's campaign requests and partnership inquiries.

Whatever's coming in, the pattern is often the same: Everything lands in one place, demanding attention, with no indication of what's actually urgent and what can wait. Someone will likely waste an entire morning sorting through it all—reading, categorizing, tagging, assigning. By the time they're done triaging, half the day is gone and nothing's been solved.

With Custom Agents, you can automatically capture, prioritize, and route tasks around the clock based on rules you set. That chaos becomes organized and work gets to the right people without anyone playing traffic controller.

**“Notion Custom Agents transformed our IT help desk and saved 20 hours per week.”**

— James Lawley, IT Ops Manager, Remote



## Routing agents keep work flowing 24/7



### Product and Engineering teams can auto-triage bugs and feature requests.

- A customer reports a login bug late one night after working hours. It sits in the inbox until the next morning when someone on the team finally sees it, reads through it, figures out it's critical, then manually assigns it to the right engineer and links it to similar issues. An hour of their morning, gone.
- With a Task Routing agent, by the time you check your inbox in the morning, it's already been tagged "critical", routed to a specific teammate, linked to two similar open issues, and added to the sprint board. You didn't touch it, and it's already in motion.



### Customer Success teams can route tickets to the right specialist.

- Customers often need specialized attention. But without automation, every ticket requires the manual detective work of digging through past conversations to figure out account details and piecing together context from scattered sources. By the time the right person gets it, they're starting from scratch. It doesn't seem very customer-centric when every interaction begins with "let me look into this."
- A Custom Agent can route tickets to the dedicated CSM automatically, flag the account tier, and surface important details like recent interactions and upcoming renewals. The CSM responds with full context immediately, keeping customers happy and informed of everything going on.



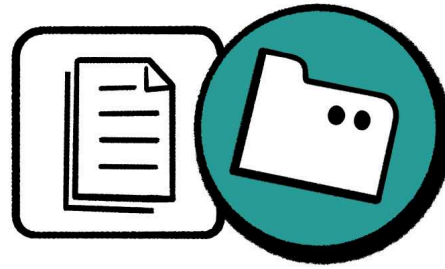
### Marketing teams can turn inbound requests into organized queues.

- With a Task Routing agent, all the inbound partnership requests your Marketing team gets are sorted automatically. Podcast appearances go to the content team with priority based on audience size. Sponsorship inquiries get flagged by budget tier and routed to the right decision-maker.
- Your team opens their queue each morning and sees exactly what needs attention, already organized by what matters most.

The shift here is from reactive chaos to proactive organization. Work that used to sit in limbo waiting for someone to notice it now gets routed instantly so nothing falls through the cracks. You spend your time solving problems, not deciding who should solve them.



# Reports, done on your schedule



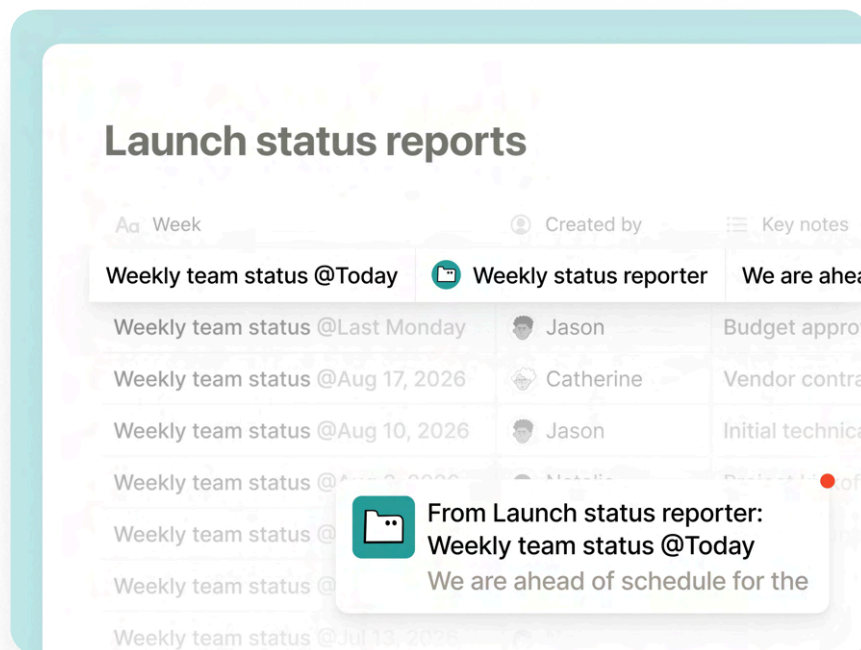
It's Friday afternoon, and you need updates for Monday's leadership meeting. So you ping five people on Slack for status updates and wait. A couple hours later, you're copy-pasting fragments from DMs and threads into a doc, then rewriting and adding more context so everything makes sense.

After hours, you finally have your status report. And you'll do it again next week. And the week after that.

Custom Agents can automate this entire process, from compiling updates throughout the week to gathering the latest from Slack and task trackers to actually writing a report, all based on whatever schedule you set.

**"I spent quite a bit of time combing through Slack channels and reading through all materials to make sure I'm up to date on things. With Custom Agents, a summary automatically pushes to me."**

— Willie Yao, Head of Engineering, Clay



## Keep everyone in the loop, automatically



### Engineering teams can compile sprint updates automatically.

- Every Friday, your engineering lead spends 90 minutes jumping between project trackers, Slack threads, and their own notes trying to piece together a sprint update report. If someone forgot to update a task status, it doesn't make it into the report.
- Instead, a Custom Agent can pull completed tasks from your project tracker, check Slack for context on blockers, surface in-progress work, and writes the summary, all in one go. Every Friday at 4pm, the sprint update is sitting in your engineering lead's inbox, formatted and ready to share. They review, tweak if needed, then ship it in 10 minutes.



### Operations teams can surface progress and risks across projects.

- Instead of spending weekends chasing updates, you can build a Custom Agent to do the work throughout the week. It can check in with project leads, pull from project docs and Slack updates, and scan task trackers for blockers.
- By Monday morning, you have a report that shows what's on track, what's at risk, and where patterns are emerging across the org. Leadership gets the full picture without anyone hunting down updates or stitching together fragments.



### Sales teams can generate pipeline summaries without chasing reps.

- Pipeline reporting is a weekly game of phone tag to figure out which deals moved, which stalled, and what the forecast looks like. Often that means pinging every rep individually. Some respond right away, some take hours, some don't respond at all until you follow up again.
- A Status Update agent scans your CRM for closed deals, stage changes, and next steps. It writes the summary automatically: "12 deals advanced this week, 3 at risk due to budget concerns, total pipeline up 8%. Top movers: Acme Corp to contract review, Vertex to final decision."

# What else can you automate?

Beyond Q&A, task routing, and reporting, teams are building Custom Agents for just about any workflow that eats their time:

**Meeting prep:** Compile recent context from docs and Slack before 1:1s so you're not scrambling to remember what you discussed last time.

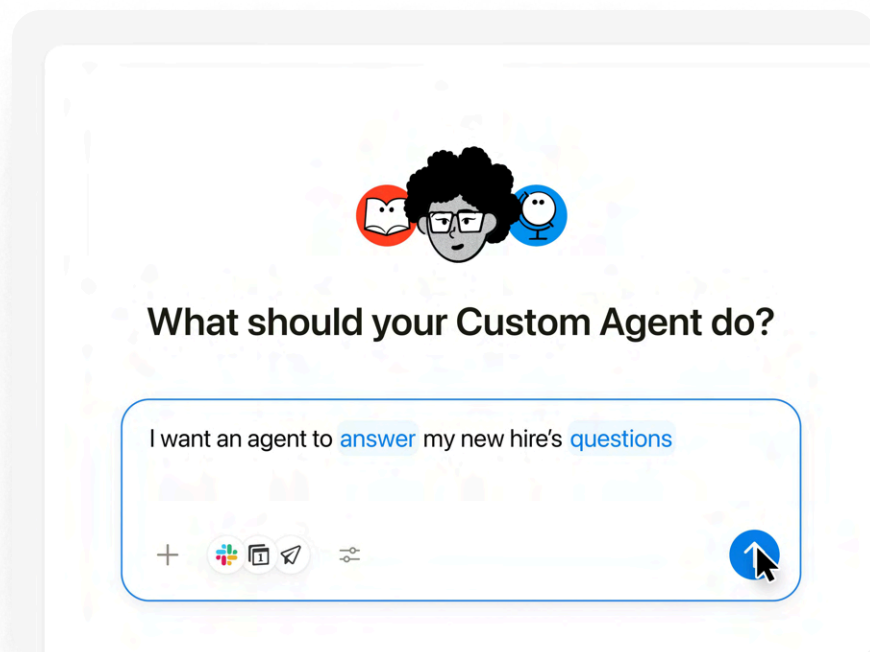
**Morning brief:** Start each day with a clear picture of what needs attention. Aggregate updates from tasks, meetings, projects, and Slack to see what's new, what's due, and what needs attention.

**Competitive intel:** Scan mentions of competitors in customer calls and sales threads, then summarize trends weekly.

**Content audits:** Flag outdated help docs or marketing pages that haven't been updated in months.

**Research synthesis:** Pull insights from customer interviews and feedback forms, then organize by theme so you can spot patterns.

If it's repetitive, time-consuming, and follows a pattern, you can probably build a Custom Agent for it.

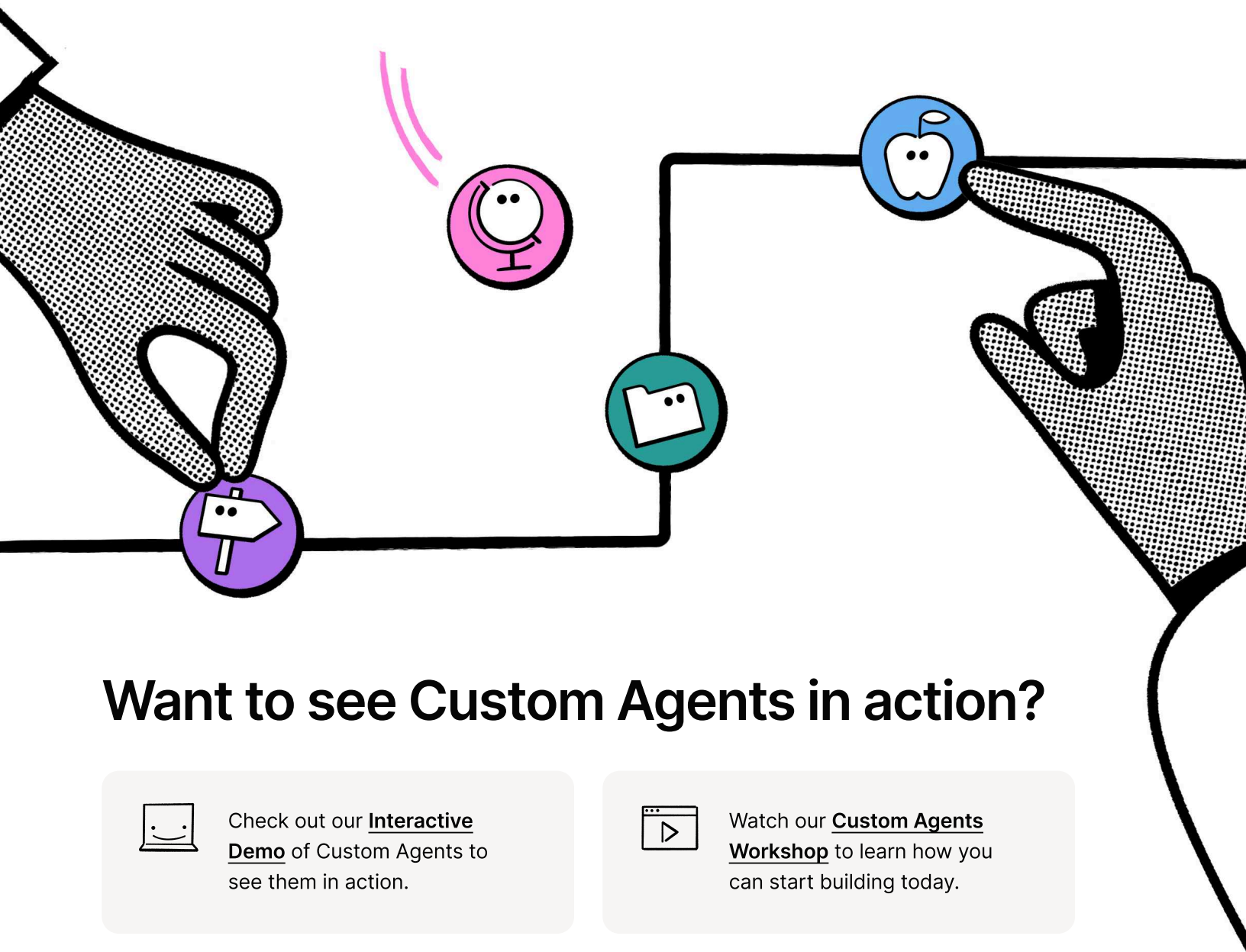


# From busywork to real work

You don't need to automate everything at once. Start with one workflow that's draining your team's time. Maybe it's the questions eating up your support team's day. Maybe it's the Friday afternoon scramble for status updates. Or maybe it's the inbox chaos that keeps your product team from actually building.

Leading teams are already using Custom Agents to get back the hours wasted on busywork every week so they can focus on work that actually moves things forward. Less time answering the same question for the tenth time. More time solving new problems. Less time chasing updates. More time acting on them.

That's the shift—from buried in busywork to focused on what matters.



## Want to see Custom Agents in action?



Check out our [Interactive Demo](#) of Custom Agents to see them in action.



Watch our [Custom Agents Workshop](#) to learn how you can start building today.