



# Reimagine **Service** With Trusted AI

The **#1** AI CRM for Service

**Fernando Gallego**  
Senior Regional Vice President  
[fgallego@salesforce.com](mailto:fgallego@salesforce.com)



# Forward Looking Statements

salesforce

This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, future financial performance, anticipated growth, industry prospects, environmental, social and governance goals, our strategies, expectation or plans regarding our investments, including strategic investments or acquisitions, our beliefs or expectations regarding our competition, our intentions regarding use of future earnings or dividends, and the expected timing of product releases and enhancements. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, Salesforce's results could differ materially from the results expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: our ability to maintain security levels and service performance that meet the expectations of our customers, and the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate performance degradation and security breaches; the expenses associated with our data centers and third-party infrastructure providers; our ability to secure additional data center capacity; our reliance on third-party hardware, software and platform providers; uncertainties regarding AI technologies and its integration into our product offerings; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy, cross-border data transfers and import and export controls; current and potential litigation involving us or our industry, including litigation involving acquired entities, and the resolution or settlement thereof; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including any efforts to expand our services; the success of our strategy of acquiring or making investments in complementary businesses, joint ventures, services, technologies and intellectual property rights; our ability to complete, on a timely basis or at all, announced transactions; our ability to realize the benefits from acquisitions, strategic partnerships, joint ventures and investments, and successfully integrate acquired businesses and technologies; our ability to compete in the markets in which we participate; the success of our business strategy and our plan to build our business, including our strategy to be a leading provider of enterprise cloud computing applications and platforms; our ability to execute our business plans; our ability to continue to grow unearned revenue and remaining performance obligation; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; our ability to limit customer attrition and costs related to those efforts; the success of our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations, including as a result of acquisitions; our ability to preserve our workplace culture, including as a result of our decisions regarding our current and future office environments or remote work policies; our dependency on the development and maintenance of the infrastructure of the Internet; our real estate and office facilities strategy and related costs and uncertainties; fluctuations in, and our ability to predict, our operating results and cash flows; the variability in our results arising from the accounting for term license revenue products; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; the impact of future gains or losses from our strategic investment portfolio, including gains or losses from overall market conditions that may affect the publicly traded companies within our strategic investment portfolio; our ability to protect our intellectual property rights; our ability to maintain and enhance our brands; the impact of foreign currency exchange rate and interest rate fluctuations on our results; the valuation of our deferred tax assets and the release of related valuation allowances; the potential availability of additional tax assets in the future; the impact of new accounting pronouncements and tax laws; uncertainties affecting our ability to estimate our tax rate; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property, including the tax rate, the timing of transfers and the value of such transferred intellectual property; uncertainties regarding the effect of general economic, business and market conditions, including inflationary pressures, general economic downturn or recession, market volatility, increasing interest rates, changes in monetary policy and the prospect of a shutdown of the U.S. federal government; the potential impact of financial institution instability; the impact of geopolitical events, including the ongoing armed conflict in Europe; uncertainties regarding the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; our ability to execute our share repurchase program; our ability to comply with our debt covenants and lease obligations; the impact of climate change, natural disasters and actual or threatened public health emergencies; expected benefits of and timing of completion of the restructuring plan and the expected costs and charges of the restructuring plan, including, among other things, the risk that the restructuring costs and charges may be greater than we anticipate, our restructuring efforts may adversely affect our internal programs and ability to recruit and retain skilled and motivated personnel, our restructuring efforts may be distracting to employees and management, our restructuring efforts may negatively impact our business operations and reputation with or ability to serve customers, and our restructuring efforts may not generate their intended benefits to the extent or as quickly as anticipated; and our ability to achieve our aspirations, goals and projections related to our environmental, social and governance initiatives, including our ability to comply with emerging corporate responsibility regulations.





Thank you



# Improving customer experiences is your top priority, but...

**68%**

of agents say balancing customer service speed and quality is difficult

salesforce



**Volume**



**Complexity**



**Expectations**



# We're in a **new era** of service

FROM

Manual Support

Disparate Platforms

Static Processes

Operational Summaries

TO

Generative Experiences

Connected Channels

AI-Powered Flows

Intelligent Data



# Challenges stand in your way

FROM

Agent Assisted

TO

Data & AI-Powered



Trust in AI

Process and Skills Gap

Fragmented Data

Siloed Applications



# Einstein 1 Service Cloud

#1 AI CRM for Service

From self-service to the  
contact center to the field

**30%**  
deflection

**+32%**  
CSAT

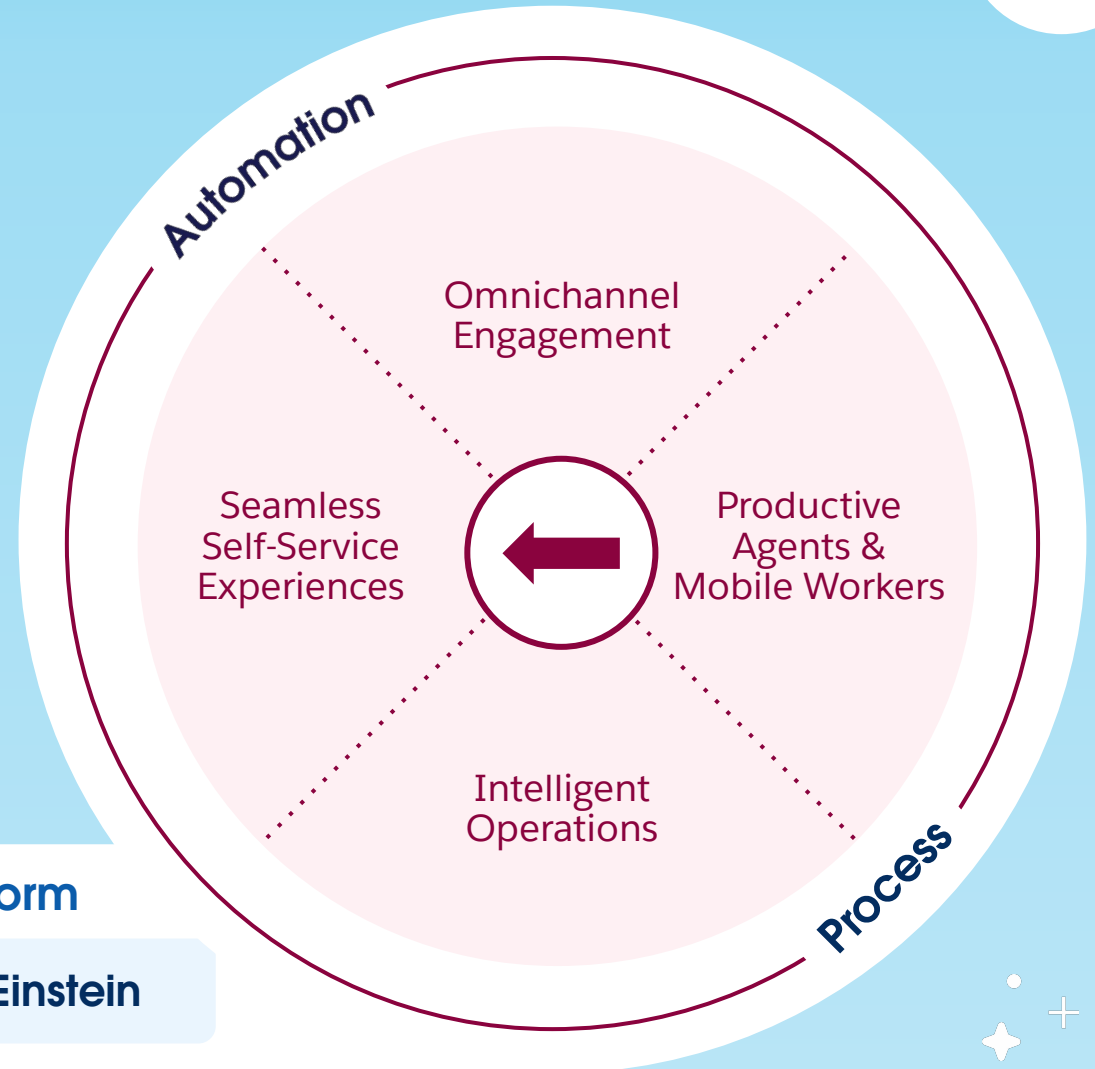


 Powered by the Einstein 1 Platform

Data Cloud

Customer 360

Einstein



# World's #1 AI CRM for Service

Every Industry



Every Type of Service

Self-Service

Service Desk

Employee Service

Contact Center

Field Service

Seamless Self-Service  
OmniChannel Engagement



## Productive Agents

Case Management

Knowledge Management

Capacity Management

Incident Management

Service Catalog

Agent Workspace

Contractor Management

Asset Management

Swarming process

## Effective Automation

Bots

Macros

Routing

Workflows

Actions

Classification

Orchestration

RPA

Scheduling

## Intelligent Operations

Reports

Conversation Mining

Dashboards

Feedback Management

Insights

Service Maturity

## Built on the Einstein 1 Platform

### Data Cloud

Personalization

Harmonization

Unified Data Lake

### CRM Apps



Sales



Service



Marketing



Commerce



Platform



MuleSoft



Tableau



Slack



AppExchange

### Einstein AI

AI Trust Layer

AI-Powered Chatbots

Predictive AI

Einstein Copilot

Generative AI

Prompt Studio

LLM Gateway

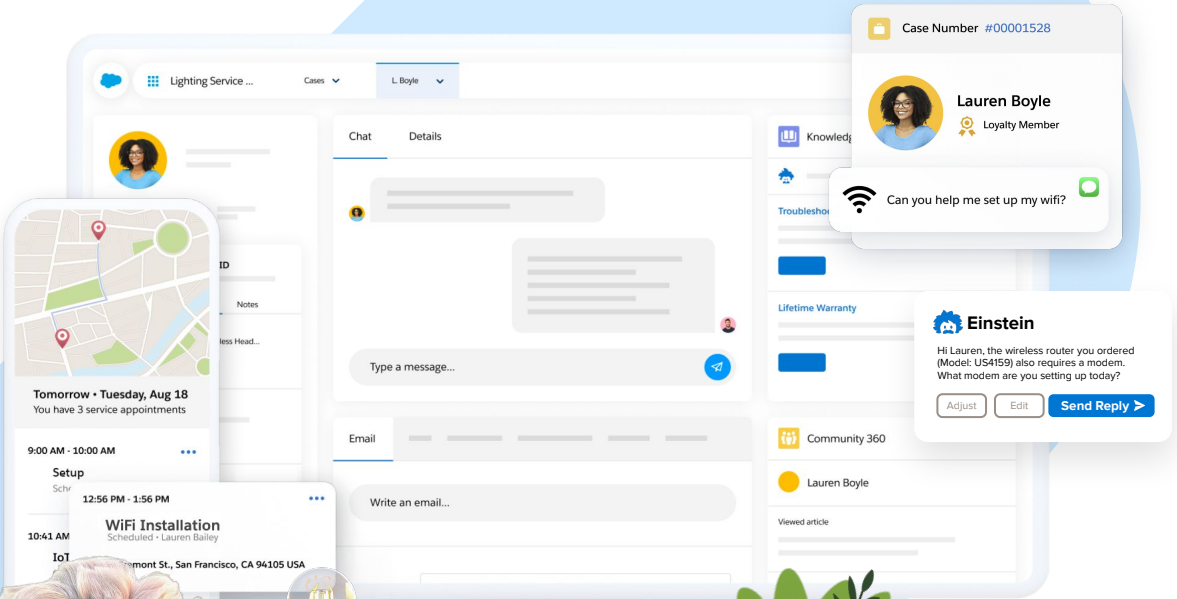




# Service Cloud

## Reimagine service from the contact center to the field with trusted AI

- Scale support across every customer touchpoint
- Boost agent & mobile worker team productivity
- Increase satisfaction with one unified AI platform



**30%** case resolution increase with AI

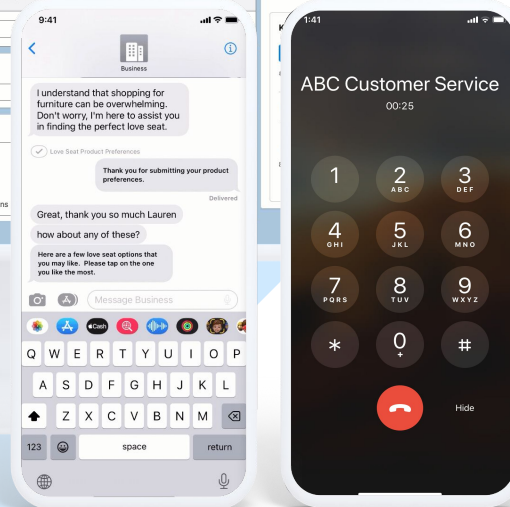
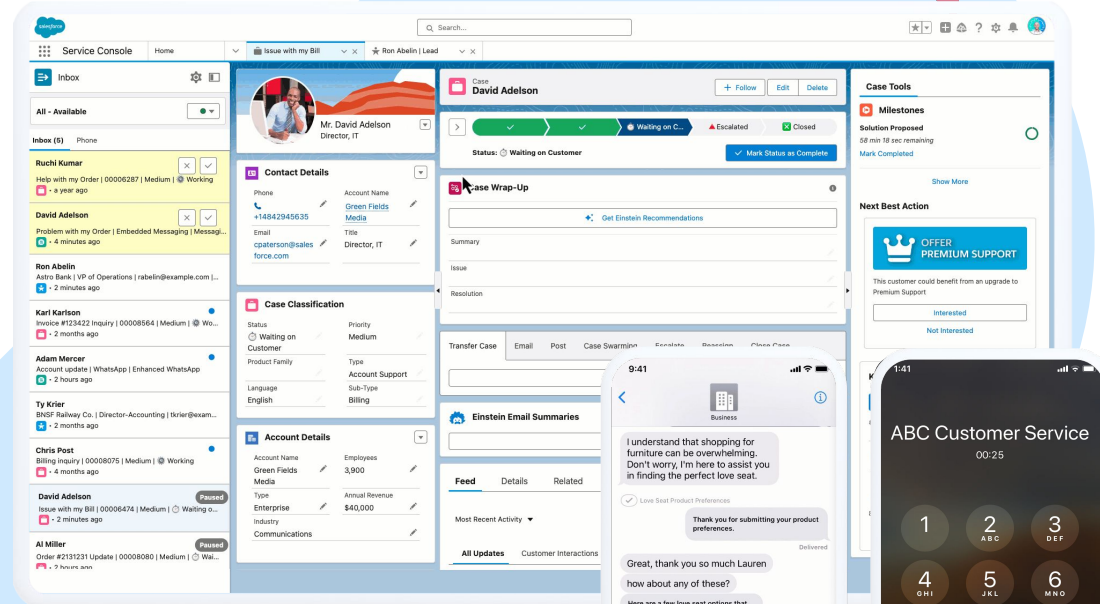
Einstein Copilot	Beta   Feb '24
Unified Knowledge	Beta   Feb '24
Field Revenue Generation	GA   Feb '24
Unified Messaging for WhatsApp	GA   Feb '24
Einstein 1 Field Service Edition	GA   Mar '24
Field Service for Government Cloud	GA   Apr '24
Process Orchestration	GA   Jun '24



# Reimagine Omnichannel Engagement

Create personalized, connected omnichannel experiences across the customer journey

- Connect voice, digital channels, and video on one unified platform
- Personalize every conversation at scale with trusted AI and automation
- Increase operational and agent efficiency with intelligence



**30%** case resolution increase with AI

Apple Messages for Business

GA | NOW

CX Cloud from Genesys and Salesforce

GA | NOW

Einstein Copilot

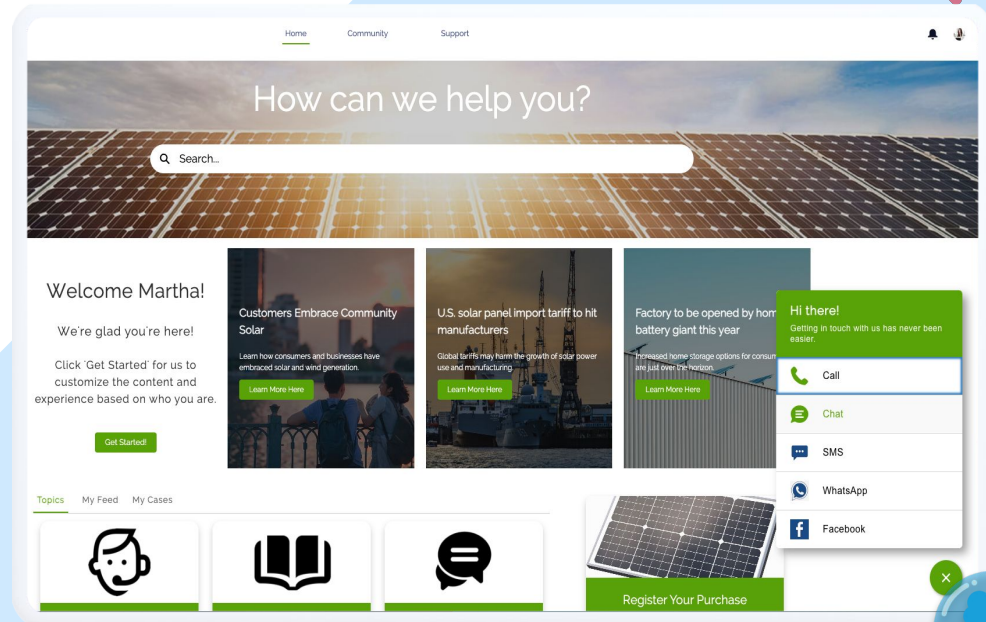
BETA | Feb '24



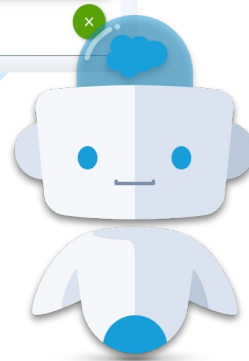
# Seamless Self-Service Experiences

Increase customer satisfaction and efficiency with AI-Powered self-service

- Connect customers to relevant answers fast
- Scale personalized support from anywhere
- Self-serve across any channel anytime



**30%** of cases deflected via self-service



Einstein Bots

Search Answers	GA   Feb '24
Unified Knowledge	GA   June '24

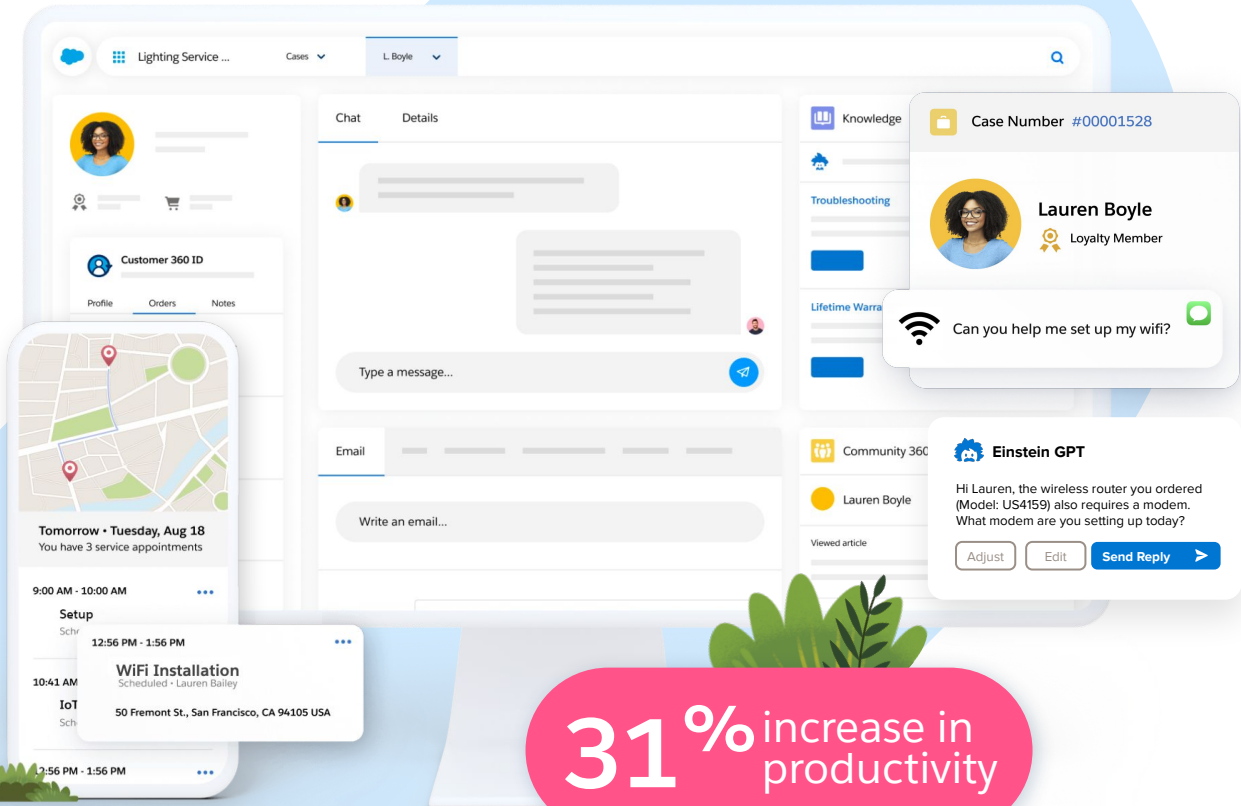




# Productive Agents & Mobile Workers

Increase service team productivity with one connected AI CRM

- Empower every team member to resolve issues quickly
- Manage every process with intelligent automation
- Personalize every interaction with trusted AI + data



Unified Knowledge BETA | Feb '24



# Service Automation & Process

Maximize service efficiency and customer satisfaction with trusted AI and automation

- Boost productivity with AI-powered recommendations
- Streamline processes and resolve cases faster with workflows
- Build once and take action across any touchpoint



**31%** faster case resolution

Service Intelligence

GA | Nov '23

Generative AI-Powered Search Answers

GA | Date

Einstein Copilot

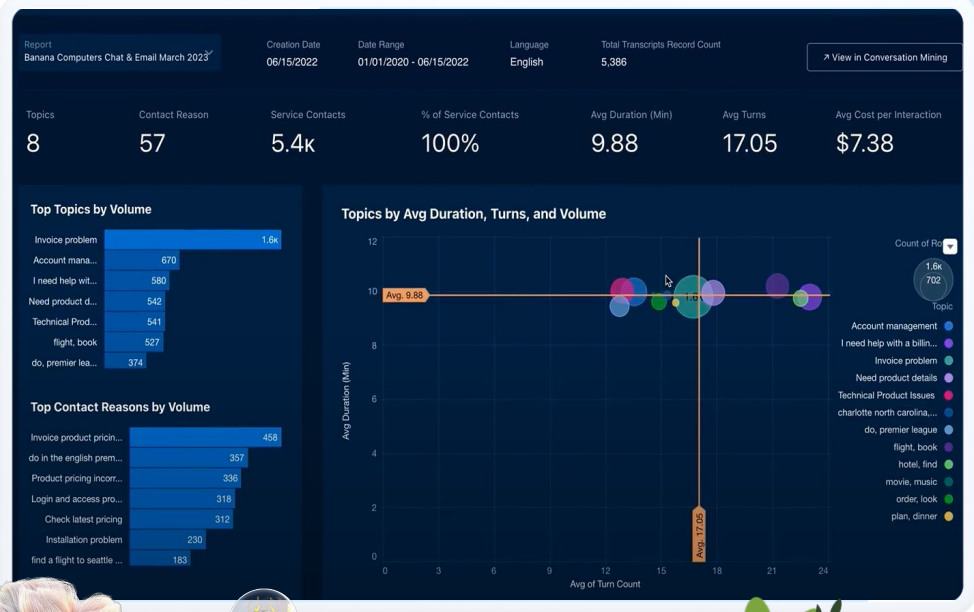
GA | June '24



# Intelligent Operations

## Streamline Service Efficiency with Trusted AI & Data

- Boost service productivity with AI-powered insights, metrics, and actions
- Leverage customer feedback to make faster decisions and improve CSAT
- Discover new impactful service capabilities that will help you achieve your service vision



20% decrease in average case age

Service Intelligence	GA   Nov '23
Gen-AI Survey Generator	GA   Feb '24
My Service Journey	OPEN BETA   June '24



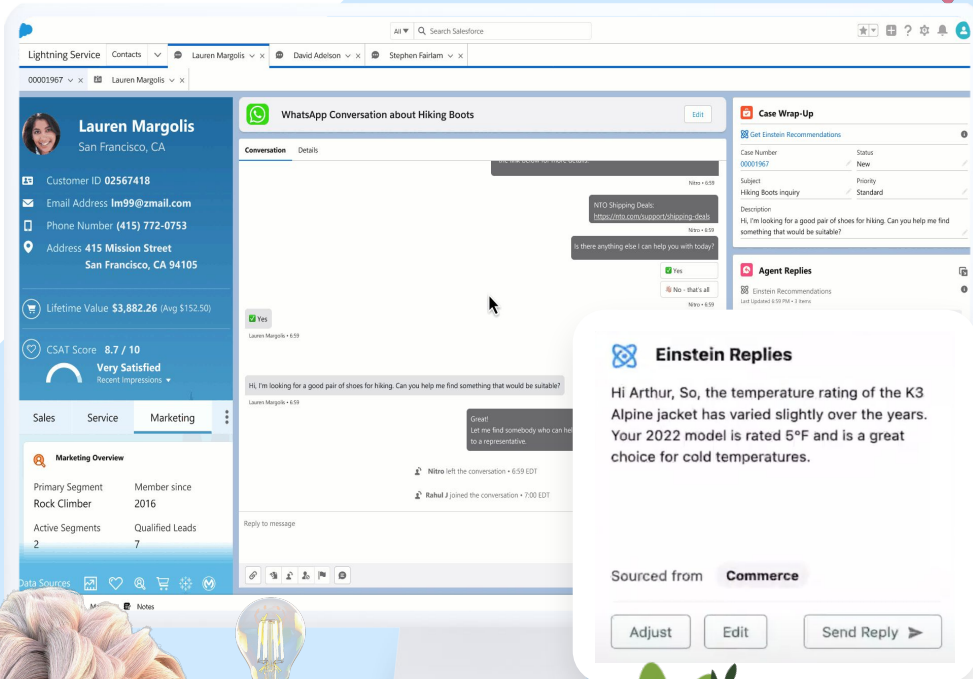


# Reimagine Contact Center

## Deliver efficiencies and resolutions with AI

- Provide omni-channel support
- Resolve issues faster and smarter
- Scale with automation and AI

Service Replies	GA   Now
Conversation Summaries	GA   Now
Knowledge Generation	GA   2024



**30%** case resolution increase with AI



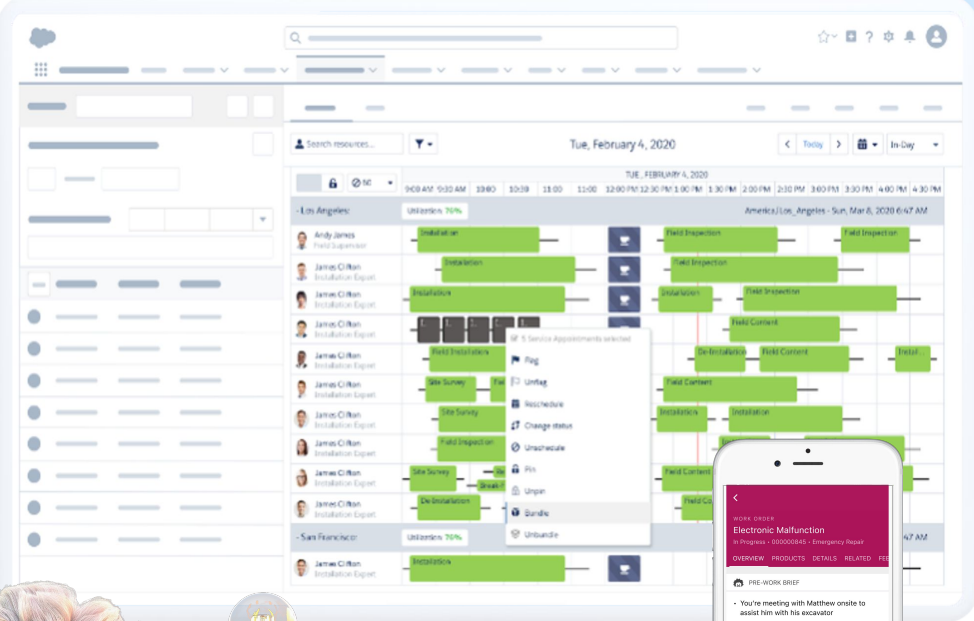
# Salesforce Field Service

Power the future with trusted AI + Data

- Redefine how your customers engage with real-time personalization
- Rethink how your teams work on one connected platform
- Reinvent your field visits with trusted AI



**32%** increase in mobile worker productivity





# Einstein Copilot



One Conversational AI Assistant across Every App

Setup Home

Search Salesforce

Einstein Copilot Studio

- Model Builder
- Prompt Builder
- Skills Builder
- Copilots

Getting Started with Skills and Actions

Choose an option from our carousel to learn more about Einstein Skills and Actions

**The Power of Actions, Skills & AI**  
Skills empower AI to use your current Salesforce Actions..

**Configuring a Skill for AI**  
Skills are easy to configure, here are the steps..

**Using Existing Skills**  
AI can now understand and...

Skills Actions Learn

**Suggested Skills**

We have compiled some useful Skills for you based on the actions currently in your Salesforce Org. Simply select the plus button to add and we will compile them for you.

- Purchase Product** (4 Actions)  
With its intuitive interface and secure payment integration, purchasing products is a breeze.
- Location Verification** (6 Actions)  
Seamlessly combining advanced geolocation technology with real-time data.
- Send Discount** (3 Actions)  
Delivers exclusive discount codes straight to your inbox, helping you unlock new opportunities.
- Send Form** (Custom)  
Whether for surveys or feedback, effortless data collection is made possible.

entities that autonomously interact to achieve desired goals.

Commerce Search Skills

Einstein

Placeholder

Save

I need a description for the Schellack account record. Create one for me.

Here is a description for the R. Schellack Company account.

The R. Schellack Company is leading provider of Enterprise Services based in the Atlanta area.

Refine Add to Description Field

What was the last record I updated?

Here is the last record you updated

**Vandelay Industries**

Contact: **Art Vandelay**  
Phone: **415-555-5555**  
Email: **avandelay@vandelay.com**  
Days Since Last Activity: **5**

View Record

Describe your task or ask a question...

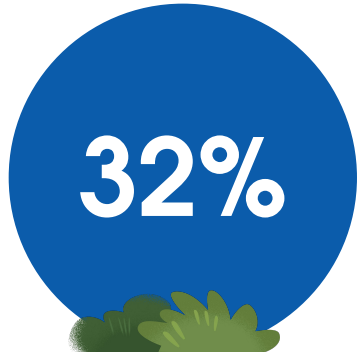
Reason through asks, then securely take action to get work done

GA | Spring '24



# Salesforce Drives Service Success

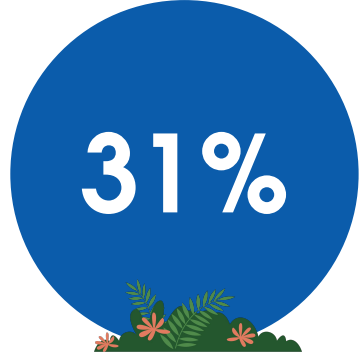
## Average Customer Success Metrics Achieved After Implementing Salesforce



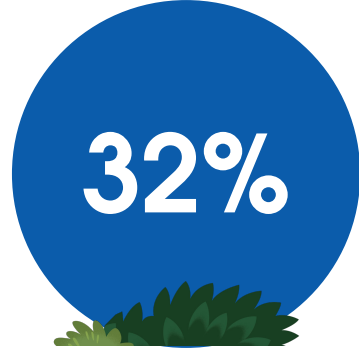
Improvement in **Customer Satisfaction**, Customer Effort, or NPS Score



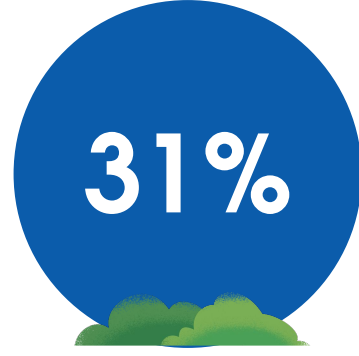
Increase in **Revenue Sourced by Service/Support Organizations**



Increase in **Customer Retention**



Increase in **Customer Service ROI**



Improvement in **Agent Productivity**



**Decrease in Service/Support Costs**



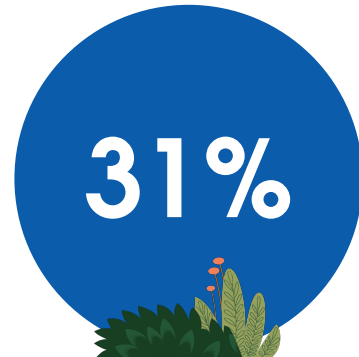
Current % of Cases Deflected via **Self-Service**



**Decrease in Case Resolution Time**



Average Number of **Minutes Saved Per Case**



**Faster Case Resolution Due to Automation**

\*The mean is higher than the 75th percentile, indicating a right-skewed distribution. See [Global report](#) for more. Source: FY24 Customer Success Metrics. Question text in notes section. Base: Total n=658-698.



# Salesforce Recognized as a Leader in CRM Customer Engagement Center

## Gartner

### Magic Quadrant™ for CRM Customer Engagement Center

Pri Rathnayake, Wynn White, Drew Kraus

November 2023



A LEADER  
14 Years in a Row

This graphic was published by Gartner, Inc. as part of a larger research document and should be evaluated in the context of the entire document. [The Gartner document is available upon request from Salesforce](#). Gartner does not endorse any vendor, product or service depicted in its research publications, and does not advise technology users to select only those vendors with the highest ratings or other designation. Gartner research publications consist of the opinions of Gartner's research organization and should not be construed as statements of fact. Gartner disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose. GARTNER is a registered trademark and service mark of Gartner and Magic Quadrant is a registered trademark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and are used herein with permission. All rights reserved.

# THANK YOU

