



AI, without the Angst

Trusted enterprise AI. Built for CRM.

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Forward Looking Statements



This presentation contains forward-looking statements about, among other things, trend analyses and future events, future financial performance, anticipated growth, industry prospects, environmental, social and governance goals, and the anticipated benefits of acquired companies. 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: impact of, and actions we may take in response to, the COVID-19 pandemic, related public health measures and resulting economic downturn and market volatility; our ability to maintain security levels and service performance meeting 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; 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 such as Tableau Software, Inc. and Slack Technologies, Inc., 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, including our July 2021 acquisition of Slack Technologies, Inc., 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 work-from-home 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 develop 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 the transfer and the value of such transferred intellectual property; uncertainties regarding the effect of general economic and market conditions; the impact of geopolitical events; uncertainties regarding the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; the 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; and our ability to achieve our aspirations, goals and projections related to our environmental, social and governance initiatives.

Forward Looking Statements



We sell many things.
I might talk about others;
Buy what we sell now.

Safe Harbor
in 34 syllables

ce, anticipated growth, industry prospects, environmental, social and governance

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
Internet; our real estate and office facilities
term license revenue products; the perform
portfolio, including gains or losses from over
our brands; the impact of foreign currency
tax assets in the future; the impact of new
transfers of intellectual property, including
geopolitical events; uncertainties regarding
our debt covenants and lease obligations; t
environmental, social and governance initiati

Risks, uncertainties:
These might cause our projections
to be incorrect.

WHAT WILL BE
THE IMPACT OF
CHATGPT ON
OUR BUSINESS?



THERE'S
A LOT WE
DON'T KNOW
FOR SURE...

LIKE HOW
MUCH OF
WHAT IT SAYS
IS MADE UP...

OR IF IT WILL
TAKE AWAY
OUR JOBS...

salesforce

OR THE
SECURITY
RISKS...



OR IF IT COULD
DAMAGE OUR
REPUTATION...



WHAT DO
WE KNOW
FOR SURE?



ONLY THAT WE
WANT TO ADOPT IT
EVERYWHERE AS
FAST AS WE CAN.



Salesforce Gen AI Survey - Sept 2023



68% of employees say generative AI will help them better serve their customers.

67% say generative AI will help them get more out of their other technology investments, like other AI tools and machine-learning models.

Employees estimate saving an average of five hours a week — the equivalent of one month per year for full-time employees — using generative AI.**





Generative AI...

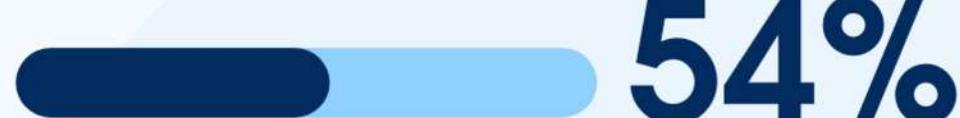
introduces new security risks



outputs are biased



outputs are inaccurate





Requirements to Use Generative AI



Addressing concerns and the AI Trust Gap

Source: 2023 Gartner CEO and Senior Business Sur

AI is the
#1
priority for CEOs

Privacy
Hallucinations
Data Control
Bias
Toxicity

But
59%
of customers don't
trust companies with
their data



Source: Twilio 2023 State of Personalization Report

Tenets of Trusted AI

Your data is not our product

Data residency & compliance

Customer control & privacy

Enterprise scale

Built-in security

Ethical in design and practice

**Accurate, Safe, Transparent,
Empowering, Sustainable**



Managing the Risks
of Generative AI

Salesforce Einstein: Pioneering AI for CRM Since 2014

1 Trillion+
predictions a week



2016
Salesforce
Einstein

SFDC AI
Research
Founded

RelateIQ
Acquired

Acquired
PredictionIO
& MetaMind

Vision and
Language

Bots

Paved way for
prompting with
DecaNLP paper

Prediction
Builder

Acquired
Bonobo

Conversation
Insights

Einstein
Search

Recommendation
Builder

CodeGen
LLM

Einstein GPT

Slack
GPT

ProGen
Paper

Tableau GPT

CodeTF &
CodeT5+
LLMs

210 AI
patents

227 AI research
papers

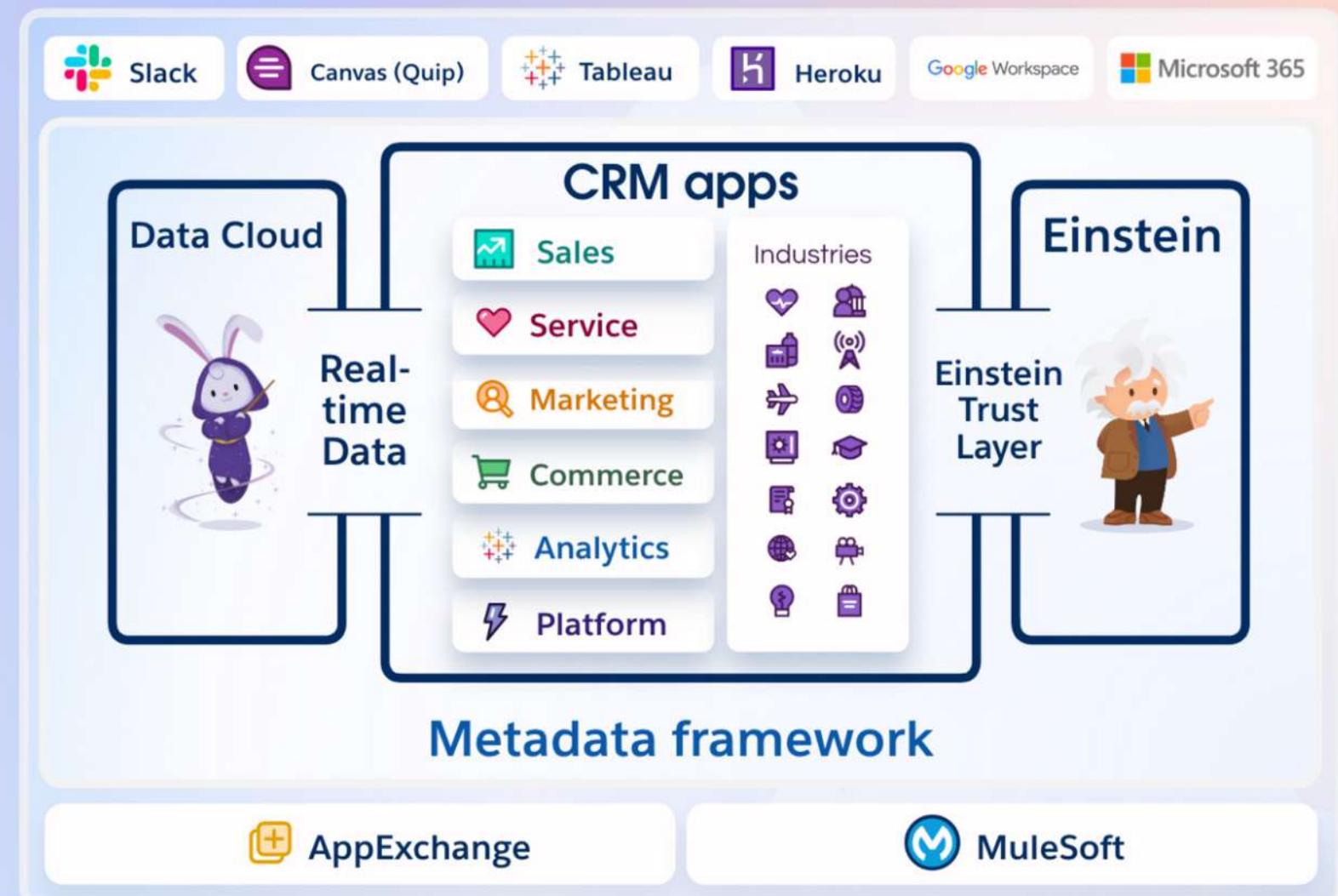
2014 2015 2016 2017 2018 2019 2020 2021 2022 2023



Einstein Platform

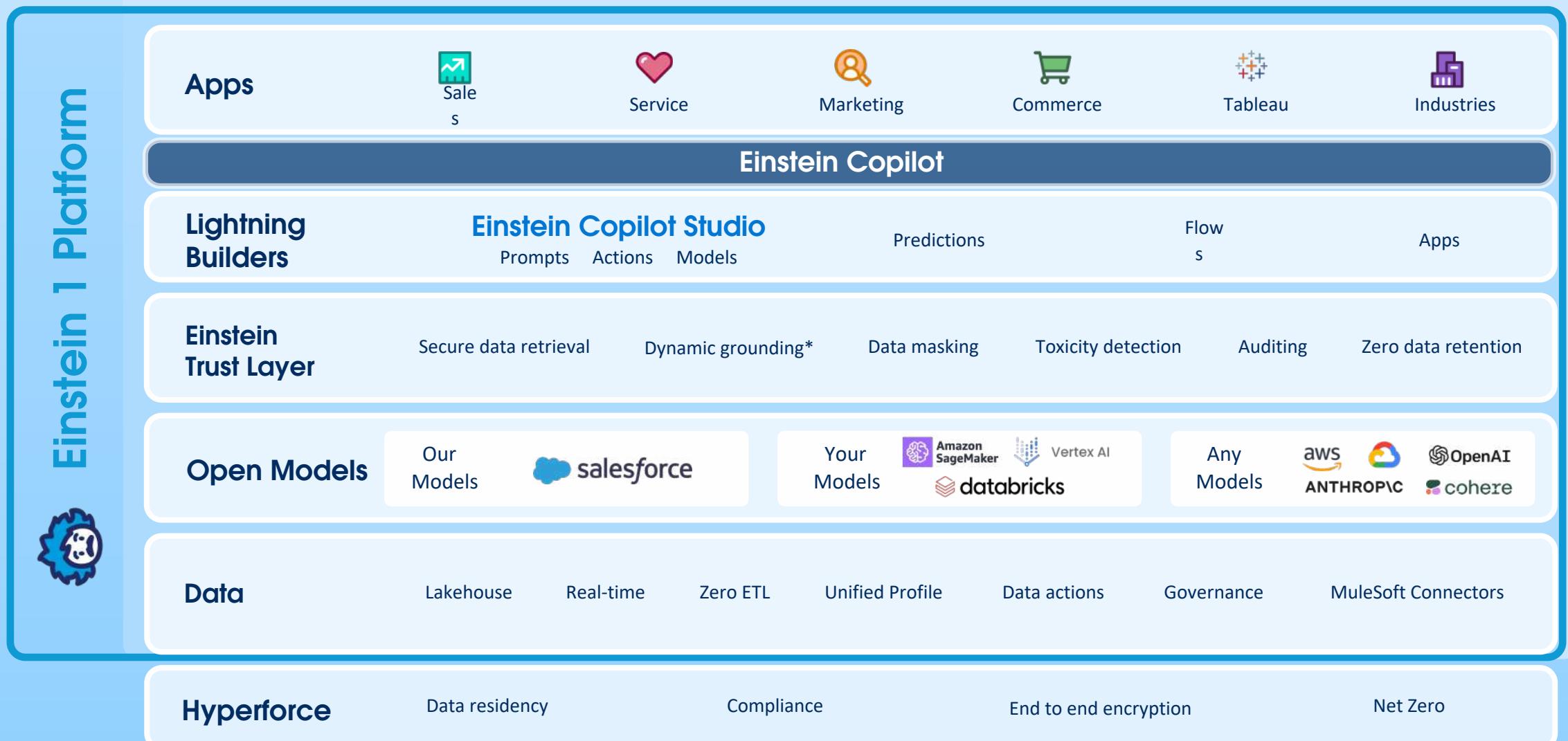
The Trusted AI Platform for Customer Companies

Integrated
Intelligent
Automated
Low code & no code
Open



Trusted AI Architecture

Unified Metadata Framework



"Future functionality. Any unreleased services or features referenced here are not currently available and may not be delivered on time or at all. Customers should make their purchase decisions based upon features that are currently available."

The Einstein Trust Layer Keeps Your Data Safe



Stored Data in CRM, Data Cloud

Stored data

Structured & unstructured

Row & field-level security



Einstein Trust Layer

Secure data retrieval

Dynamic grounding

Data masking

Toxicity detection

Auditing

Zero retention

LLMs

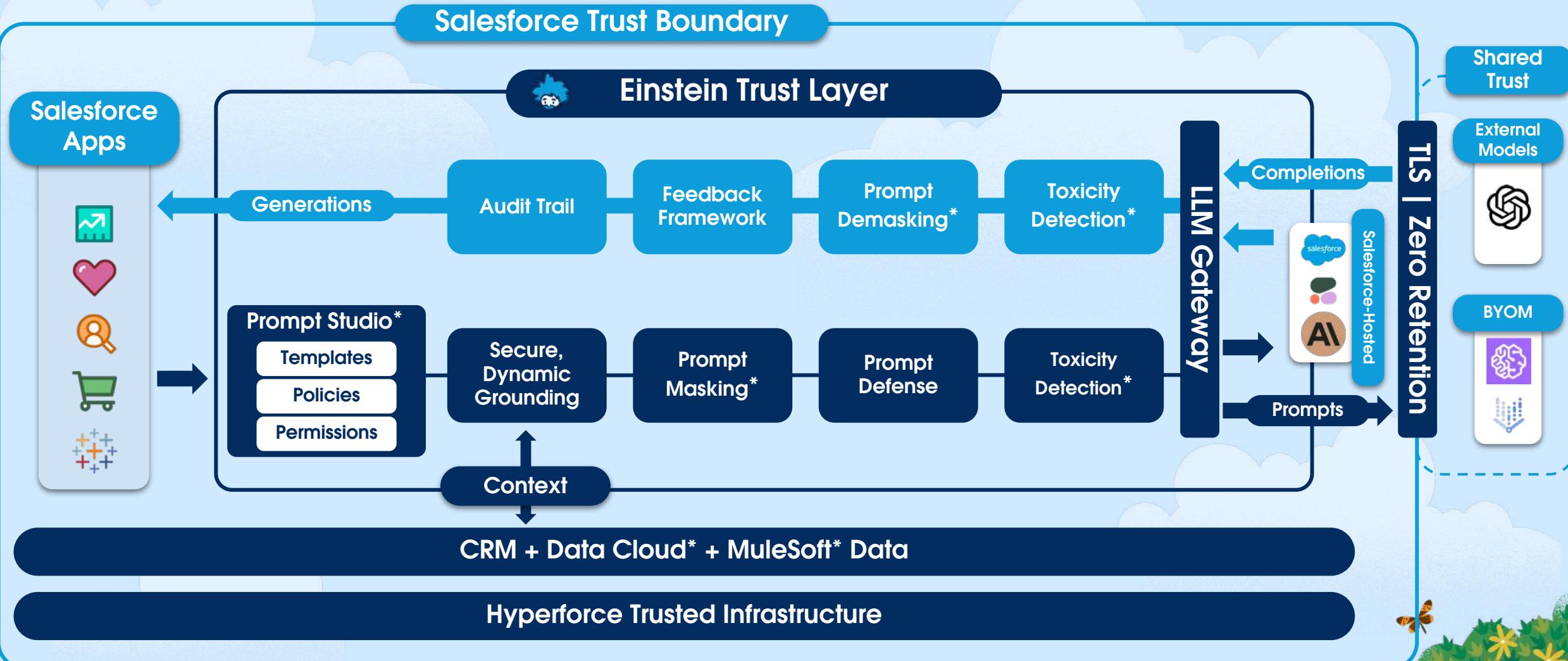
Learned data

Neural network

No control over recall



Deep Dive of the Einstein Trust Layer





Announcing

salesforce

Einstein Copilot

One Conversational AI Assistant across Every App

The screenshot shows the Einstein Copilot Studio interface. On the left, a sidebar lists "Setup" and "Home" under "Einstein Copilot Studio", with "Skills Builder" selected. Under "Suggested Skills", three cards are shown: "Purchase Product" (4 Actions), "Location Verification" (6 Actions), and "Send Discount" (3 Actions). Below this, a section titled "Skills" lists various Einstein Skills, including "Order Handling" (4 Actions), "Verify Customer" (3 Actions), "Knowledge" (System), "Event Scheduler" (System), and "Meeting Prep". A large callout bubble on the right contains a screenshot of the Einstein AI assistant window. The window has a placeholder field and a "Save" button. It shows a conversation where the AI asks "What was the last record I updated?" and responds with "Here is the last record you updated" followed by details about "Vandelay Industries" (Contact: Art Vandelay, Phone: 415-555-5555, Email: avandelay@vandelay.com, Days Since Last Activity: 5). A "View Record" button is at the bottom.

Reason through asks, then access trusted tools to get work done

Pilot | Feb '24

Generative AI, Built Into the Flow of Work



Supercharge productivity with trusted AI *on one platform*



Sales

Close deals faster

Sales Emails

Call Summaries

Account Overview

Deal Insights



Service

Deliver proactive service

Service Replies

Work Summaries

Knowledge Articles

Search Answers



Marketing

Create more resonant content

Email Content Creation

Segment Creation

Campaign Assistant



Commerce

Increase conversion rates

Product Descriptions

Smart Promotions

Commerce Concierge



IT

Develop faster

Code Completion

Natural Language to Code

Chat-based Coding Assistant



The Right LLM for the Right Task



Shared Trust

Data retained in Salesforce
with joint moderation



GA

Salesforce Hosted

Globally on Hyperforce



ANTHROPIC



Available starting
July '23

Bring Your Own Model

Your model, your infrastructure



Available November '23



Accelerate Growth Now with Sales AI

Sell Faster with AI and Automation

Sell Smarter with Data

Sell Efficiently on One Platform



Sales Emails

GA Now



Call Summaries

GA Now

A screenshot of the Microsoft Outlook inbox interface. A large white callout bubble in the top right corner displays the text "+29% increase in seller productivity". The inbox shows several email messages from Junhui Luo, Hanna Charles, Microsoft Viva, and others. On the right side of the screen, the "Compose" ribbon tab is selected. A sidebar titled "Einstein GPT Sales Emails" is open, showing a list of suggested actions: "Introduce Myself", "Send a Meeting Invite", "Nudge for Follow-Up", "Check In", and "Reconnect". Below this, there are sections for "Email Templates" (with a dropdown menu), "Email Tracking" (with a toggle switch turned off), "Text Shortcuts" (with a dropdown menu), and "Send Later Using Salesforce" (with a toggle switch turned off). The overall theme is integration of AI-generated sales emails and automation features directly within the Outlook environment.

Scale Now with Service AI



Personalize every interaction with trusted CRM data

Boost service productivity & drive faster resolutions

Drive efficiencies on one, connected platform

Service Replies

GA July 19

Work Summaries

GA July 19

Knowledge articles

Pilot Now

Search answers

Pilot Now

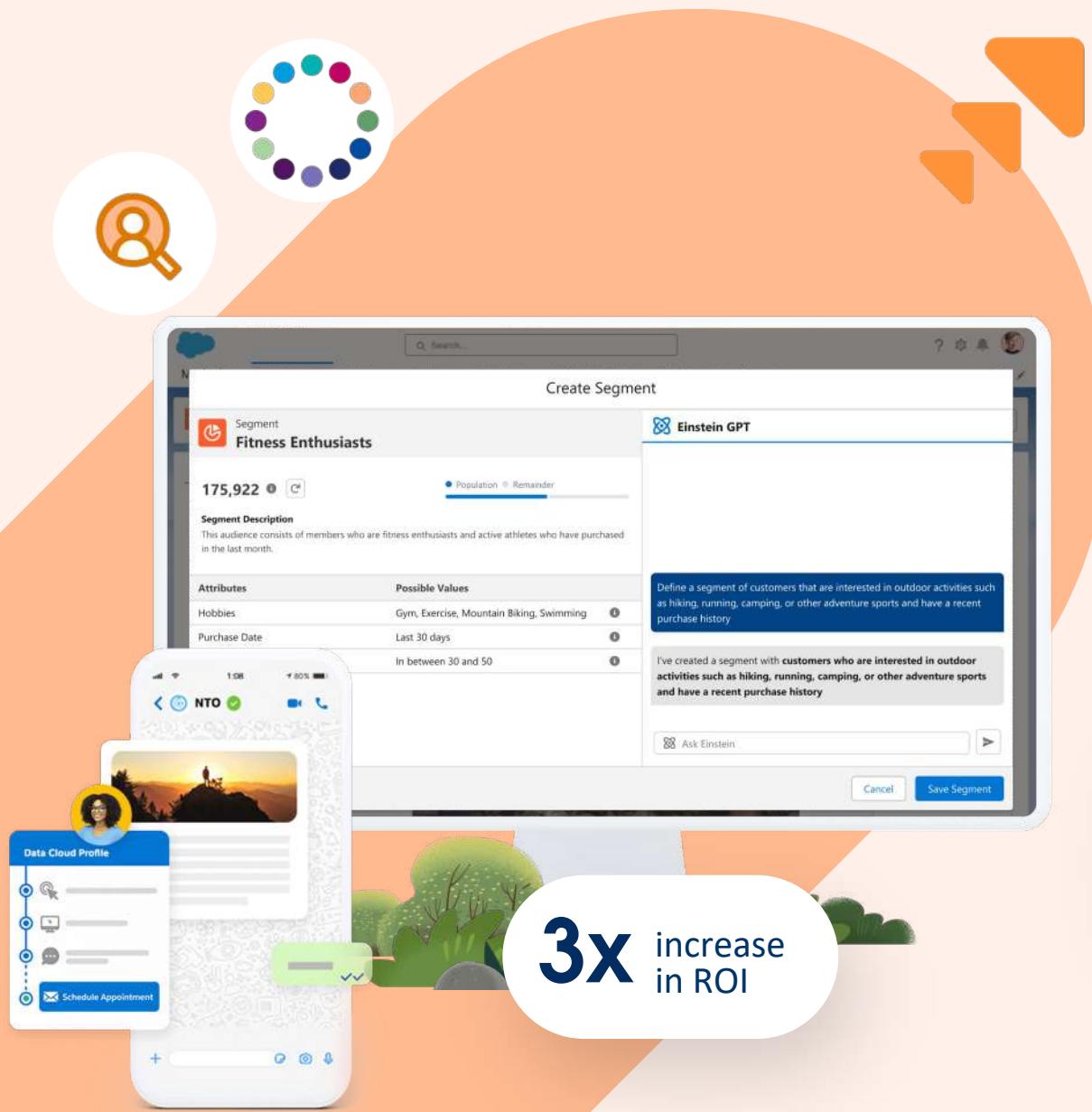
Mobile work briefings

Pilot Now

The screenshot shows a Salesforce Service Cloud interface. A customer message reads: "I have a question about family plans". An admin response follows: "Hello, and thanks for being a P... Melissa, how can I help?". The Einstein Replies sidebar suggests: "Hi Arthur, So, the temperature rating of the K3 Alpine jacket has varied slightly over the years. Your 2022 model is rated 5°F and is a great choice for cold temperatures." Other sidebar options include "Einstein Recommendations" and "Last Updated 12:05:55 AM - 2 Items".

+30%

case resolution
increase with AI



Introducing Marketing AI

Make every moment count with AI + Data + CRM

Fuel creativity with data-driven answers

Unlock efficiency with GPT-powered campaigns

Redefine the limits of personalization at scale

Segment Creation
Pilot | Summer '23

Email Content Creation
Pilot | Winter '24



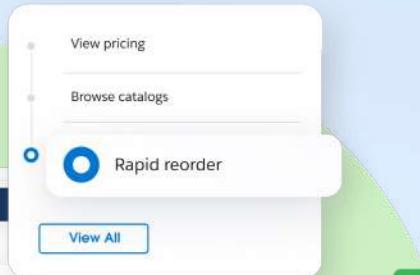


NEW SUPER HERETIC BIKE AVAILABLE NOW

SHOP NOW | LEARN MORE

2B unique shoppers in 2022**

* FY23 Customer Success Metrics
** Salesforce FY22 Platform Data



Introducing Commerce AI

Power commerce everywhere with AI + Data + CRM

Fuel growth with the power of trusted AI

Personalize at scale with real-time, harmonized data

Sell on every customer touchpoint with the #1 CRM

Embedded Apps for Sales and Service

Embedded Apps for Social

Hybrid Storefront

GPT-Powered Product Descriptions

GPT-Powered Concierge

GPT-Powered Promotions

GA | Now

GA | Now

GA | Now

GA | Aug. '23

Pilot | Oct. '23

Pilot | Oct. '23



Einstein for Developers

Unleash developer productivity with generative AI for Salesforce languages

Q4 CLOSED PILOT

CLOSED PILOT



Build custom apps at lightning speed with AI-driven coding

Ship best-in-class CRM code with AI-suggested improvements

Uplevel dev expertise instantly with AI-paired programmer



Apex GPT

Closed Pilot | Now



LWC GPT

Closed Pilot | Sept '23



Code Builder

GA | Oct '23



90 mins per week saved by developers internally at Salesforce

```
1 public with sharing class ContactController {  
2     // create method that returns a list of contacts with name and co  
3     // limit the query to 10 records picture should not be null  
4     < > Accept Tab Accept Word X → ...  
5  
@AuraEnabled(cacheable=true)  
public static List<Contact> getContactList() {  
    return [  
        SELECT  
        Id,  
        Name,  
        FirstName  
        LastName  
        Title,  
        Phone,  
        Email,  
        PhotoU  
    ]  
}
```

ASK EINSTEIN: APEX

Hello, how can I help you?

Hello please explain user mode

This is a great question. Let me explain how WITH USER_MODE works.

User mode means the user's permissions and Sharing access are respected while the Apex code is running.

For example, if the logged-in user does not have access to an object or record, then the Apex code will not be able to access it either.

Data + AI + CRM + Trust Roadmap



Sales Cloud

Sales Email	GA Now
Call Summaries	Oct GA
Account Overview	Feb Pilot
Deal Insights	Feb Pilot



Service Cloud

Service Replies	GA Now
Work Summaries	GA Now
Knowledge Email	Pilot Now
Global Search Answers	Pilot Now
Knowledge Creation	Aug Pilot
Conversations Catch Up	Oct Pilot



Marketing Cloud

Email Content Creation	August Pilot Oct GA
Campaign Assistant	Sept Pilot



Commerce Cloud

Product Description	Pilot Now Aug GA
Smart Promotion Creation	Aug Pilot
Plugin Builder	Aug Pilot
OMS Return Optimizer	Oct Pilot
Commerce Concierge	Oct Pilot

[Data Spaces](#) | GA Today

[BYOL - Data Sharing with Snowflake](#) | GA Today

[Data Cloud Triggered Flows](#) | GA Oct '23

[Data Cloud Enrichments](#) | GA Oct '23

[Reports & Dashboards for Data Cloud](#) | GA Oct '23

[Segment Creation](#) | GA Oct '23

[Data Graphs](#) | GA November '24

[Prompt Grounding with Data Cloud](#) | GA Feb '24

Data



[Einstein Copilot](#) | Pilot Feb '24

[Einstein Copilot Studio:](#)

[Prompt Builder](#) | GA Feb '24

[Skills Builder](#) | Pilot Feb '24

[Model Builder - BYOM with SageMaker](#) | GA Today

[Model Builder - BYOM with Vertex AI](#) | GA Oct '23

[Model Builder - BYOM with Databricks](#) | Pilot Oct '23

[Model Builder - No-Code Model Builder](#) | Pilot Oct '23

[Einstein for Developers](#) | Beta Today

AI



[Dynamic Grounding](#) | GA Feb '24

[Data Masking](#) | GA Today

Trust

[Zero Retention](#) | GA Today

[Toxicity Detection](#) | GA Today

[Audit Trail](#) | GA Today

salesforce

Thank you

