Task: Find executive/board leadership changes for Salesforce (ticker: CRM).

Timeframe: Last 12 months + today.

Source hierarchy (in this order):

1) SEC Filings (EDGAR): 8-K (Item 5.02 first), then 10-K/10-Q, then DEF 14A.

2) Earnings call transcript (only if leadership changes are explicitly discussed).

3) Reputable news wire/press release (Reuters, WSJ, Bloomberg, company IR) — ONLY if no SEC 8-K yet for the same event.

For each leadership change, return the following fields:

- Role: [CEO/CFO/Director/etc.]

- Person: [Full name]

- Action: [Appointed/Resigned/Retired/Interim/Committee change]

- Effective\_date: [YYYY-MM-DD]

- Announcement\_date: [YYYY-MM-DD]

- Source\_tier: [SEC 8-K | SEC 10-K/10-Q | DEF 14A | Earnings call | News/Press]

- Citation: [Filing type + Item + filing date OR transcript date + section OR news outlet + timestamp]

- SEC\_status: [“Confirmed in SEC” | “Not yet in SEC — see News”]

- Lag\_vs\_event\_days: [integer]

- Notes (2–3 sentences, max ~300 chars): Provide both mechanics (e.g., transition plan, advisory agreement, interim role)

AND strategic context (e.g., impact on governance, AI strategy, investor concerns).

Rules:

- Always search EDGAR first. Filter for 8-K Item 5.02 in last 12 months; then scan 10-K/10-Q and DEF 14A.

- If SAME-DAY announcement is found in news but no SEC 8-K yet, include it and set SEC\_status = “Not yet in SEC — see News”.

Compute Lag\_vs\_event\_days = days between announcement and nearest related SEC filing.

- If both SEC and News exist, keep the SEC record as primary and only note news as secondary; do not duplicate.

- Deduplicate by [Person + Role + Effective date].

- Exclude blogs, social media, or unverified sources. Do not infer titles or dates.

- Timezone: America/Toronto. Print dates in YYYY-MM-DD.

Here’s the same set of **Salesforce leadership changes** with **richer two-line context** in the notes field:

* **Robin L. Washington** — Appointed **President & Chief Operating and Financial Officer**
  + Effective date: March 21, 2025
  + Announcement date: February 5, 2025
  + Source: SEC Form 8-K, Item 5.02 (filed Feb 5, 2025)
  + Notes: This is a newly created combined COO/CFO role. Washington remains on Salesforce’s board and is tasked with integrating operations and finance.
* **Brian Millham** — Retired / Stepped down as **President & Chief Operating Officer**
  + Effective date: March 21, 2025
  + Announcement date: February 5, 2025
  + Source: SEC Form 8-K, Item 5.02 (filed Feb 5, 2025)
  + Notes: Transition plan outlined; Millham will stay until May 1, 2025 as an employee advisor, then move to a non-employee advisory position. His departure marks the end of a 25-year Salesforce career.
* **Amy Weaver** — Transitioned from **President & CFO** to **Special Advisor to the CEO**
  + Effective date: March 21, 2025
  + Announcement date: February 5, 2025
  + Source: SEC Form 8-K, Item 5.02 (filed Feb 5, 2025) and 10-K (filed Mar 5, 2025)
  + Notes: Weaver stepped aside from day-to-day CFO duties to focus on advisory work. An amended agreement (Mar 4, 2025) extended her transition package and clarified her ongoing role with Marc Benioff.
* **Amy Chang** — Appointed **Director**
  + Effective date: July 9, 2025
  + Announcement date: July 9, 2025
  + Source: SEC Form 8-K, Item 5.02 (filed Jul 9, 2025)
  + Notes: Brings expertise in AI and enterprise growth, aligning with Salesforce’s Data + AI push. Strengthens board diversity and product strategy oversight.
* **David Kirk** — Appointed **Director**
  + Effective date: July 9, 2025
  + Announcement date: July 9, 2025
  + Source: SEC Form 8-K, Item 5.02 (filed Jul 9, 2025)
  + Notes: Adds financial and audit committee experience. His appointment supports Salesforce’s ongoing governance refresh following activist pressure.