

Drive Growth & Service Excellence with a Unified AI Strategy

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Forward-looking statements

This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, anticipated growth and industry prospects, and our strategies, expectation or plans regarding 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, results or outcomes could differ materially from those 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 consummate the proposed Informatica acquisition on a timely basis or at all; our ability to meet the expectations of our customers; uncertainties regarding AI technologies and its integration into our product offerings; the effect of evolving domestic and foreign government regulations; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including related to AI and Agentforce; our ability to execute our business plans; the pace of change and innovation in enterprise cloud computing services; and our ability to maintain and enhance our brands.



20+
years
as a
trusted
partner

Service is
evolving.

Together, we're
evolving faster.

AI is rewriting the rules on how customers engage with brands

salesforce

Smarter

More intuitive

On demand

Faster

sms



The fundamentals
have not changed.
The tools have.

costs **5-7x**

more to acquire a
new customer than
to retain an existing
one

Service Cloud is now

Agentforce Service

Connected service on every channel.
Service that never sleeps.

-26%

Support
costs

+33%

Customer
satisfaction

Source: FY26 Salesforce Customer Success Metrics



salesforce

Self Service
Assisted Service
Service Insights

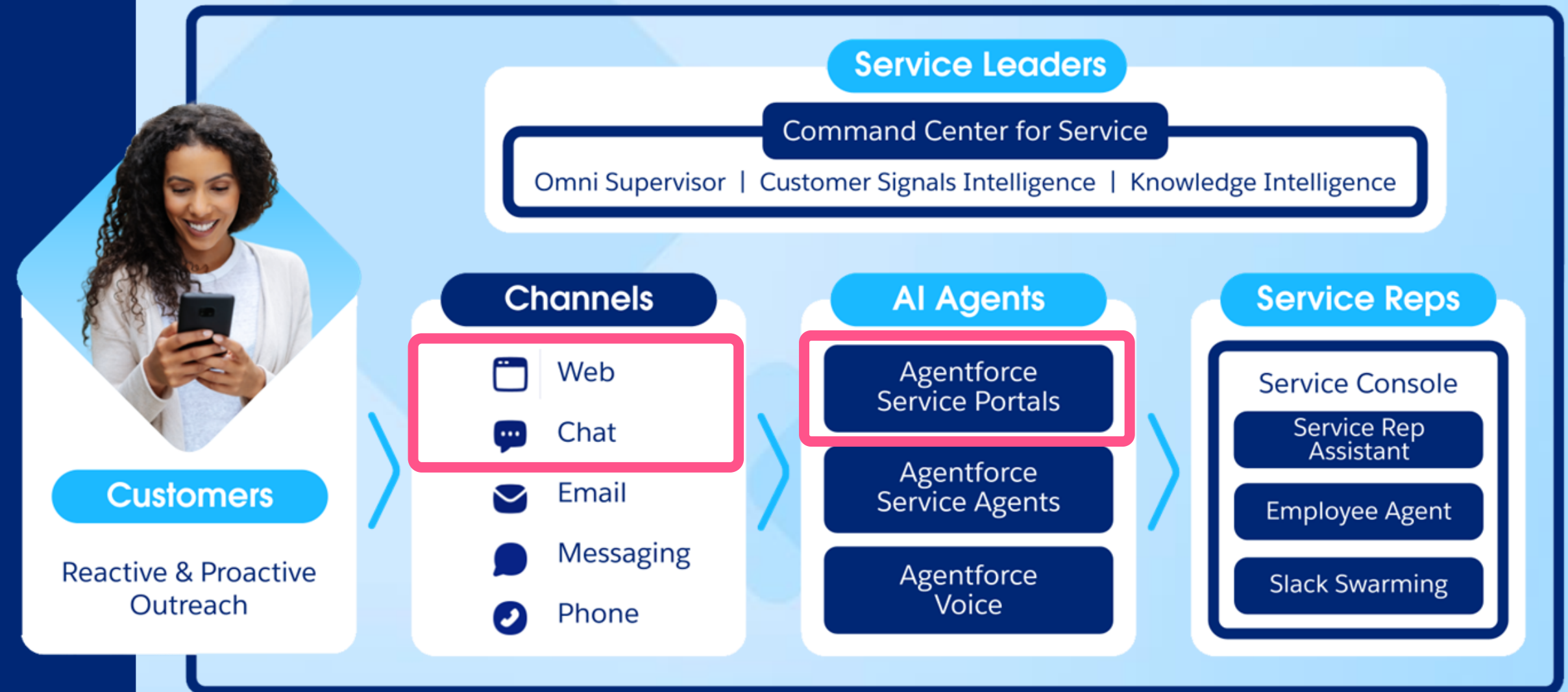


Contact Center | HR Service | IT Service | Field Service

Unified Knowledge + Customer Data + Channels

Salesforce Metadata Platform

AI Powered Self-Service



Self-service **expectations** are higher than ever

salesforce

Then

Google

Search Google or type a URL



Now

How can I help you?

 ChatGPT

AI Agents

+700M
weekly active
users on ChatGPT,
up 4x year over
year



Why it matters

Instant Personal Answers

1:1 Personal Support 24/7

Fast and Effortless



A 'set it and forget it' portal is **failing** your customers

salesforce

Minimal branding

 **welo**



how do I file a claim?

No customer profile data

Overwhelming search and navigation

200+ Results

How to file an insurance claim

Information required for home insurance claims

From file a Claim

Service only resolves

14%

of customer issues

Static FAQs

Welo Bot

Hello! I need to file an auto insurance claim

Hi, please explain your issue.

I'm an Elite member. Where can I claim insurance?

Please visit our website.

I am on your website! Please connect me with support.

Contact support at [this link](#).

Type your message...

One-size-fits-all Bot

Missed context for personalisation

High-effort transitions

AI Powered Service Portal

Turn your portal into a concierge experience

salesforce

The screenshot displays the Oceanic Airways website with a navigation bar including Home, Check-In, Book, Support, Flight Status, About Us, and a Contact Us button. The main heading reads "Enjoy the best of travel with Oceanic Trident status", followed by a subtext: "Oceanic Airways Trident status offers the highest level of travel comfort and flexibility. You made it to the top – now enjoy every moment."

Below this, there are two knowledge sections:

- KNOWLEDGE SUMMARY**: A text block describing the benefits of Trident Tier status, such as complimentary lounge access, priority check-in, and baggage handling. It includes two buttons: "Request lounge guest pass" and "Redeem flight credits".
- KNOWLEDGE Q&A**: A section with expandable questions. One question is "Can I bring more than one guest into the lounge?". Another is "Can I access the lounge if I'm flying economy?", which is expanded to show the answer: "Yes – your Trident status grants access regardless of cabin class, as long as you're flying with the airline or a qualifying partner".

At the bottom, there is a "Get to know" section with a "Premium cabin upgrade" offer. A chatbot interface is overlaid on this section, showing a user query: "Please book me three hours before my flight". The chatbot responds: "Yes I can help schedule car service before your trip to Greece on Flight #1920 on 11/20/25. What time would you like to be picked up?". The user has entered "Schedule pick up for 10:30am".

26%
decrease in
service costs

Humans + Agentforce
Resolve Issues Faster

Roadmap | Agentforce Service Portals

Personalized Portals

GA | Feb '26



PERSONALIZED HOME PAGE

ACTION ITEMS

ACTIVITY TIMELINE

Cumulus

CasesClaimsAccount

Sara Taylor

Welcome back, Sara

Search our help options and FAQs

Have a Question? Try our new smart search

Q Search

Quick Actions

View/Modify Policy

Submit a Claim

Make a Payment

Trending Articles

Suggested for you

Insurance dispute policy

Viewed 2 days ago

Claim guide

Viewed 15 mins ago

Billing dispute policy

Viewed 2 days ago

Your 5 Tasks Awaiting Action

Mon, 8 Sep

Reschedule Inspection

Coordinate and confirm a home inspection appointment with your insurance adjuster to assess property damage.

Take Action

Review Your Documents

Provide documentation to support your home insurance claim.

Take Action

Upload More Photos

Provide clear photographic evidence of property damage to support your home insurance claim.

Take Action

Claim Refund

Coordinate and confirm a home inspection appointment with your insurance adjuster to assess property damage.

Recent Activities

Case Summary

Your home insurance claim has been registered and is currently pending inspection. The adjuster will assess damage to the living room ceiling, kitchen floor, and a crack in the bedroom wall. All required documents have been uploaded, and the property is ready for review. The claim will move forward once the inspection is complete.

Inspection Scheduled

On 10th Sep, 9:00 AM

2:00pm | 10/10/25

Document Submission

Under Review

12:30pm | 10/10/25

Case #4829 Created

John registered a claim request

11:30am | 09/10/25

Claim Request Submitted

Mail sent to John Smith

10:00am | 09/05/25

January 2025

February • 2025

This Month

Show All Activities

Chat

Recent Activities

Case Summary

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January 2025

February • 2025

This Month

Show All Activities

Chat

Schedule Inspection

Yes, I'd like to know when someone can come

I found some available slots. Select one to schedule.

Wednesday 10th Sep

9:00 AM - 9:30 AM

Thursday 11th Sep

9:00 AM - 9:30 AM

Friday 12th Sep

10:00 AM - 10:30 AM

Submitted

Great! Your inspection is scheduled for Thursday, Sept 12th at 10 AM. You'll receive a confirmation email and SMS reminder.

Type your message...

PERSONALIZED ASA INTERACTIONS

Roadmap | Agentforce Service Portals

Agentforce Search

GA | June '26



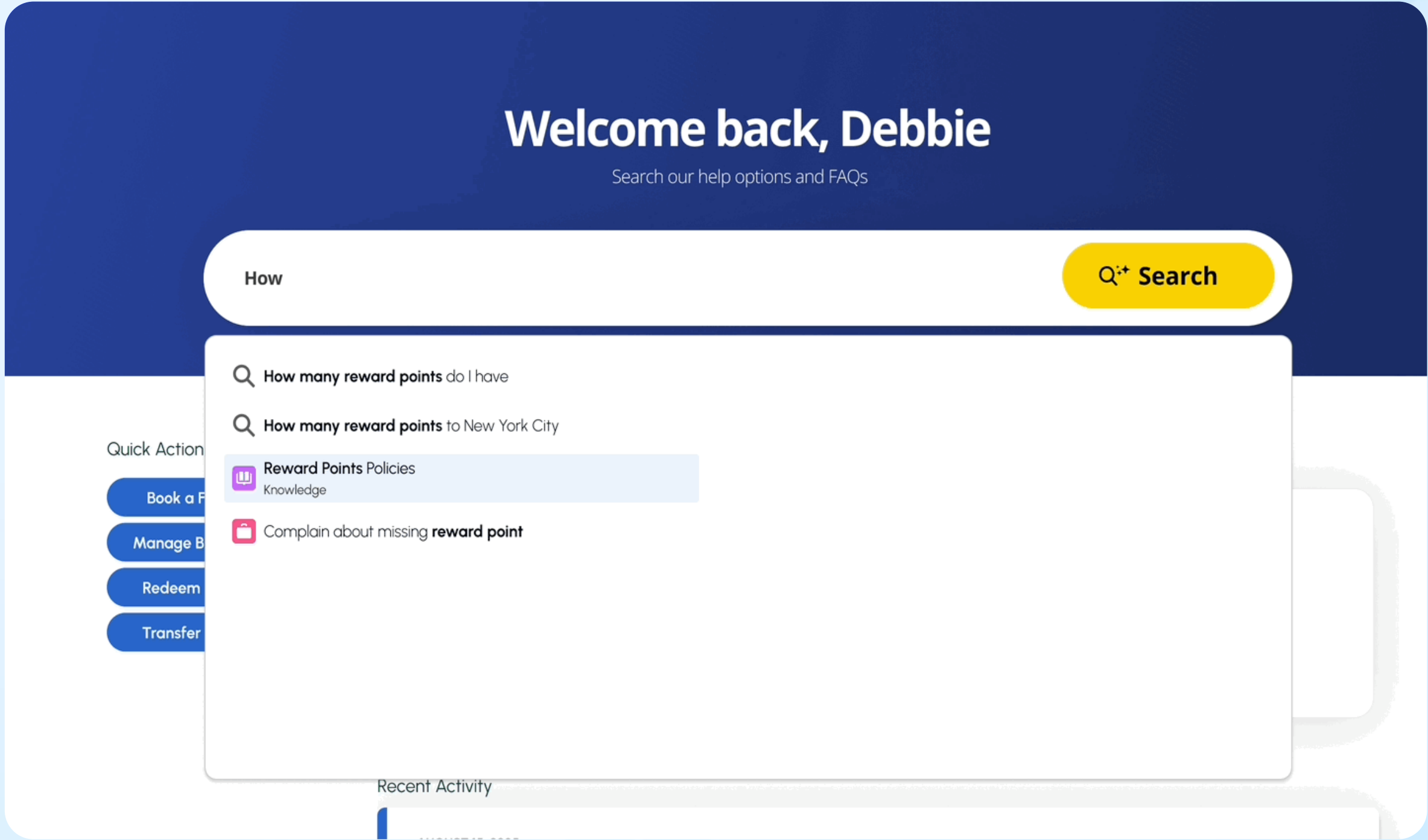
CONTEXT AWARE ANSWERS

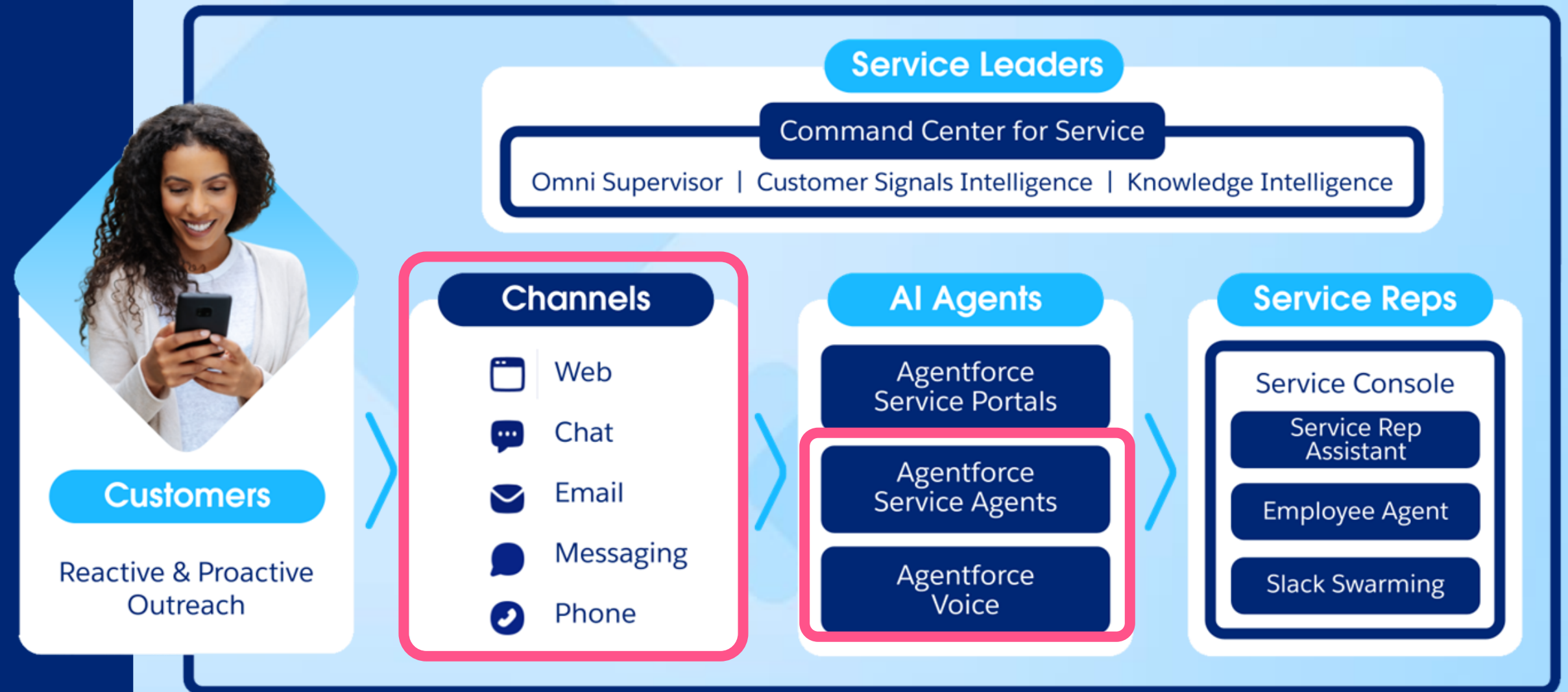
CONVERSATIONAL SEARCH

TRIGGER ACTIONS

SEAMLESS HANDOFF TO A HUMAN

THE AGENTIC AI FRONT DOOR FOR CHANNELS





Channels



The background is a vibrant blue gradient. It features several overlapping geometric shapes: a large light blue triangle on the right, a medium blue triangle at the bottom right, and a dark blue triangle at the top left. There are also several white, four-pointed starburst shapes scattered across the image, particularly around the text. The text is centered and reads:

There is no such thing
as a “bad” channel.
It all depends on the
contact reason.

Agentforce Across All Your Channels

salesforce

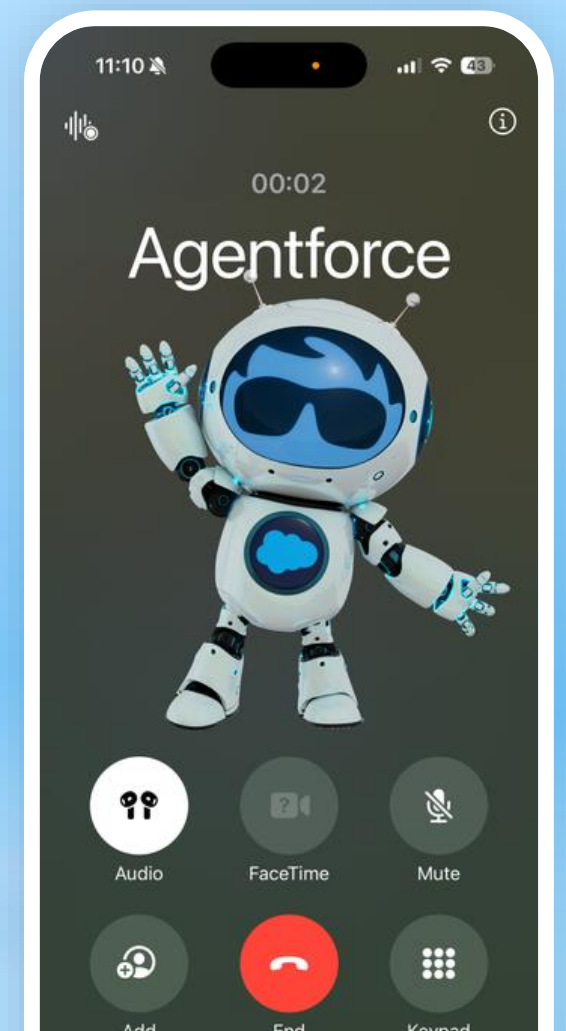
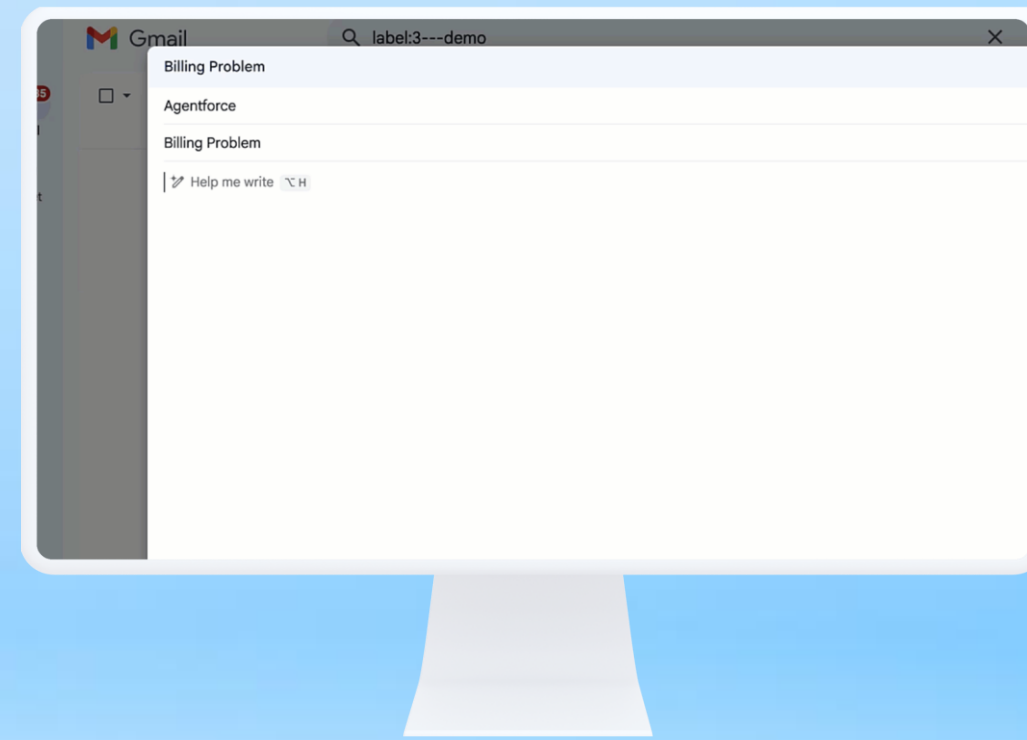
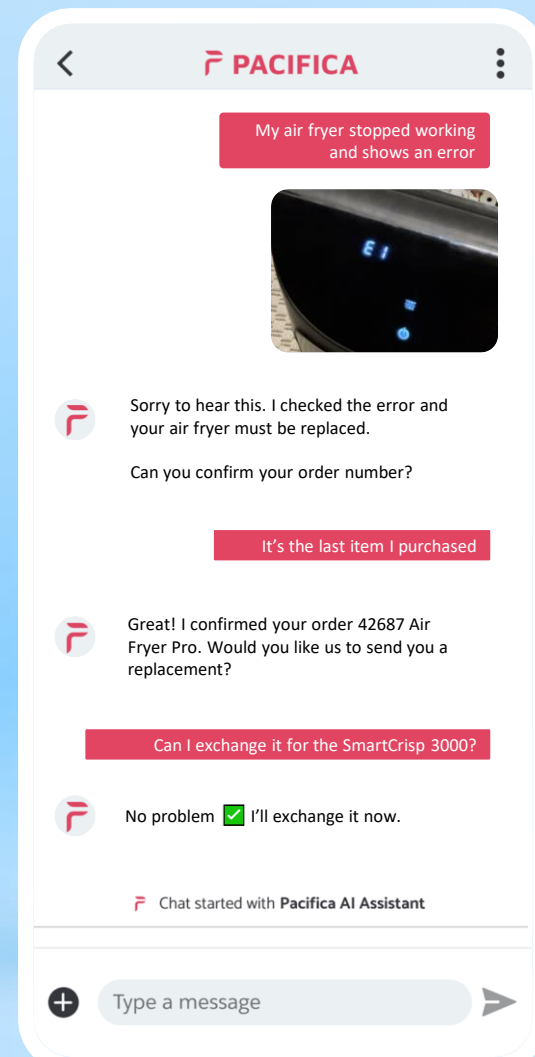
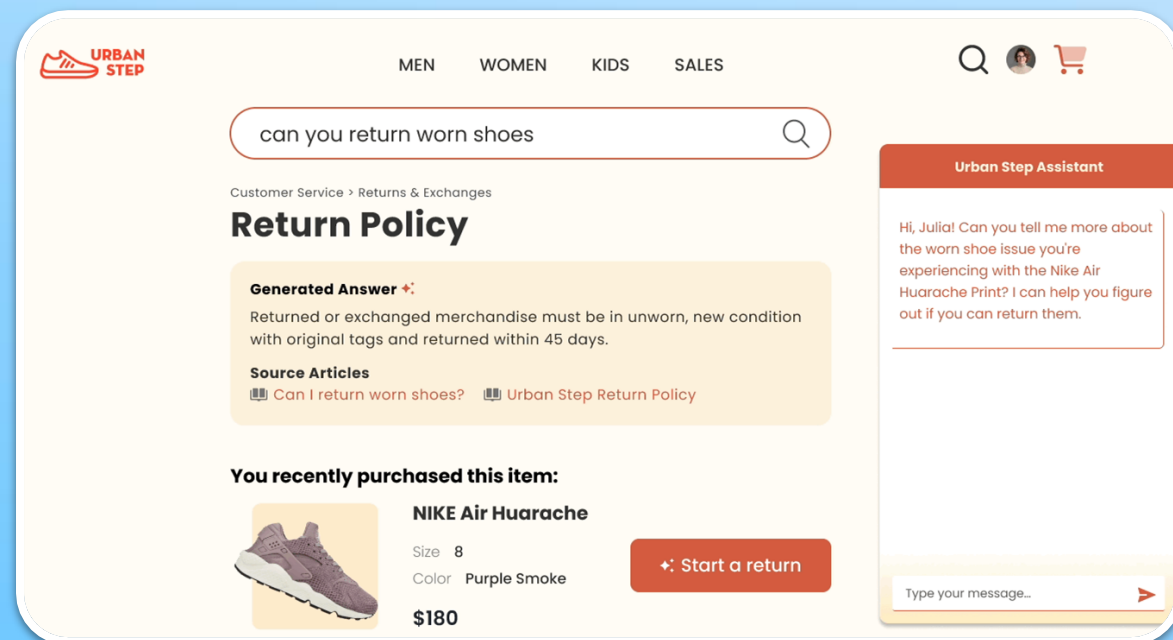


Help Center & Portals

Digital Channels

Email

Phone



GA | Dreamforce '25

salesforce

Agentforce Voice for the Phone Channel

Reduce costs, increase resolutions

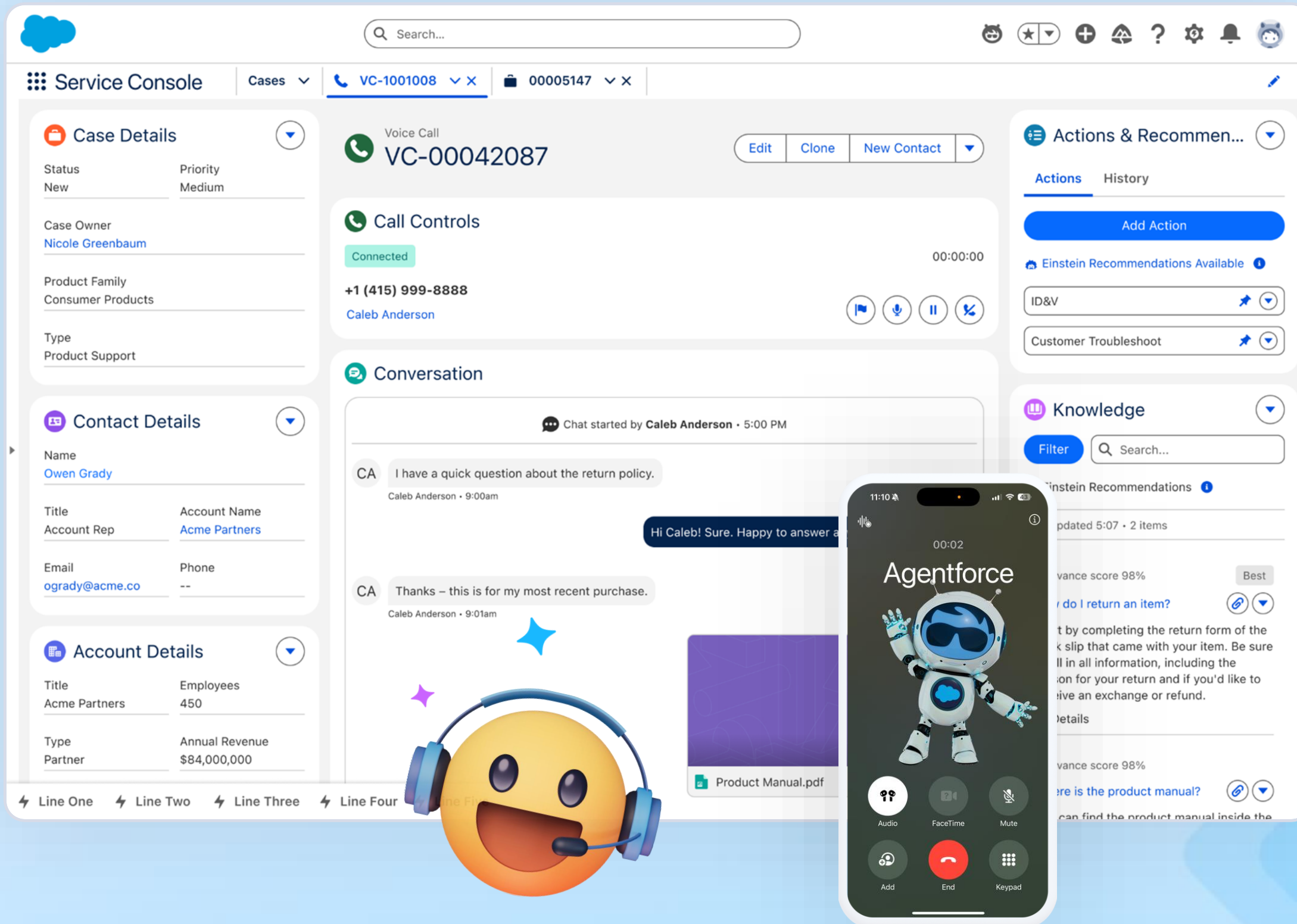
Automate routine calls 24/7 and escalate complex cases - with full access to Salesforce actions

Engage with context and take action

Handle every call with an intelligent, human-like agent that knows your customer and takes action

Your agents, your setup

Works with your telephony provider, with seamless call forwarding and a log of the full call transcript





Demo



Dream Big, Start **Small**



Level 1

Answer

FAQs
Knowledge
Help Documentation



Level 2

Access

Provide a direct response to
“status” and “what is my”
use cases



Level 3

Action

Enable autonomous and
guarded interactions with
customer data



Knowledge
Channels

and/or

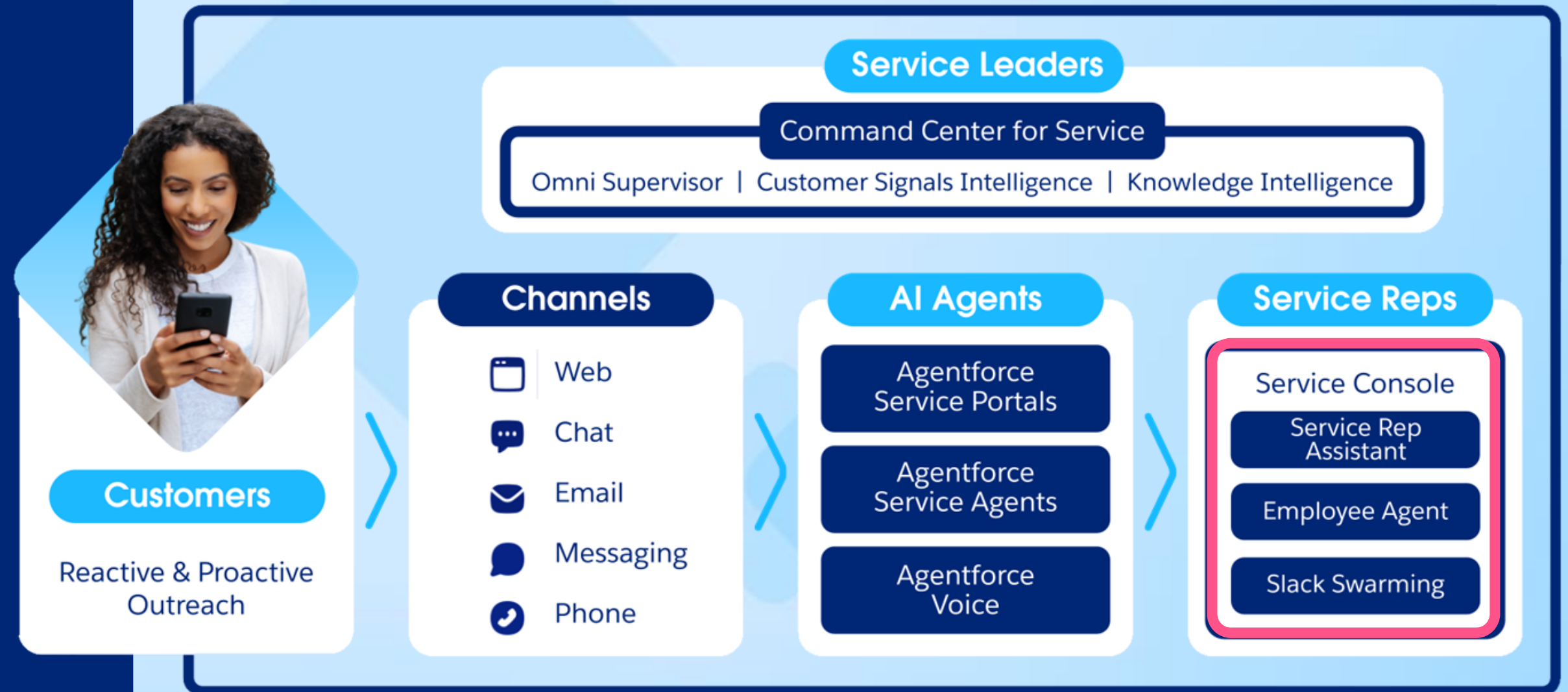


CRM Data
Data Cloud
APIs

and/or



CRM Data
Mulesoft
APIs



Rep Experience

AI is evolving the rep role

salesforce

Then

Tasks

Costs Center

Generalist

AI Handoffs

Now

Conversationalists

Revenue Generators

Specialist

AI Partners



Empower Reps with AI Powered Assistance

salesforce

Personalize every interaction with C360 data

Get every case, on every channel to the right agent

Deliver global support in any language

Speed up onboarding & resolutions with guidance plans

Drive efficiency with single-click actions

Ground your AI with your trusted Knowledge

The screenshot displays the Salesforce NovaCard Service interface. At the top, there's a search bar and navigation tabs for 'Cases', '00001234', and '00005678'. The main content area is divided into several sections:

- Customer Profile:** Jackie Frost, Mexico City, Mexico. Contact info: Email (jackie.frost@email.com), Phone (+52-55-1453-7535), Address (Juan Pérez, Calle Reforma 376, Colonia Roma Norte, 06700 Ciudad de México).
- Engagement Signals:** CSAT (High | 86%), LTV (High | \$15,000), Sentiment Trend (Positive).
- Case Details:** Status (Open), Priority (Medium), Origin (Home).
- Case Feed:** Shows a message from Jackie Frost asking questions about NovaCard perks.
- Knowledge Base:** Displays 'NTO Return Policy' with details on return procedures.
- Service Assistant:** A sidebar panel showing a 'Service Plan' for 'Product Inquiry' with steps like 'Work the Case' and 'Wrap Up'.

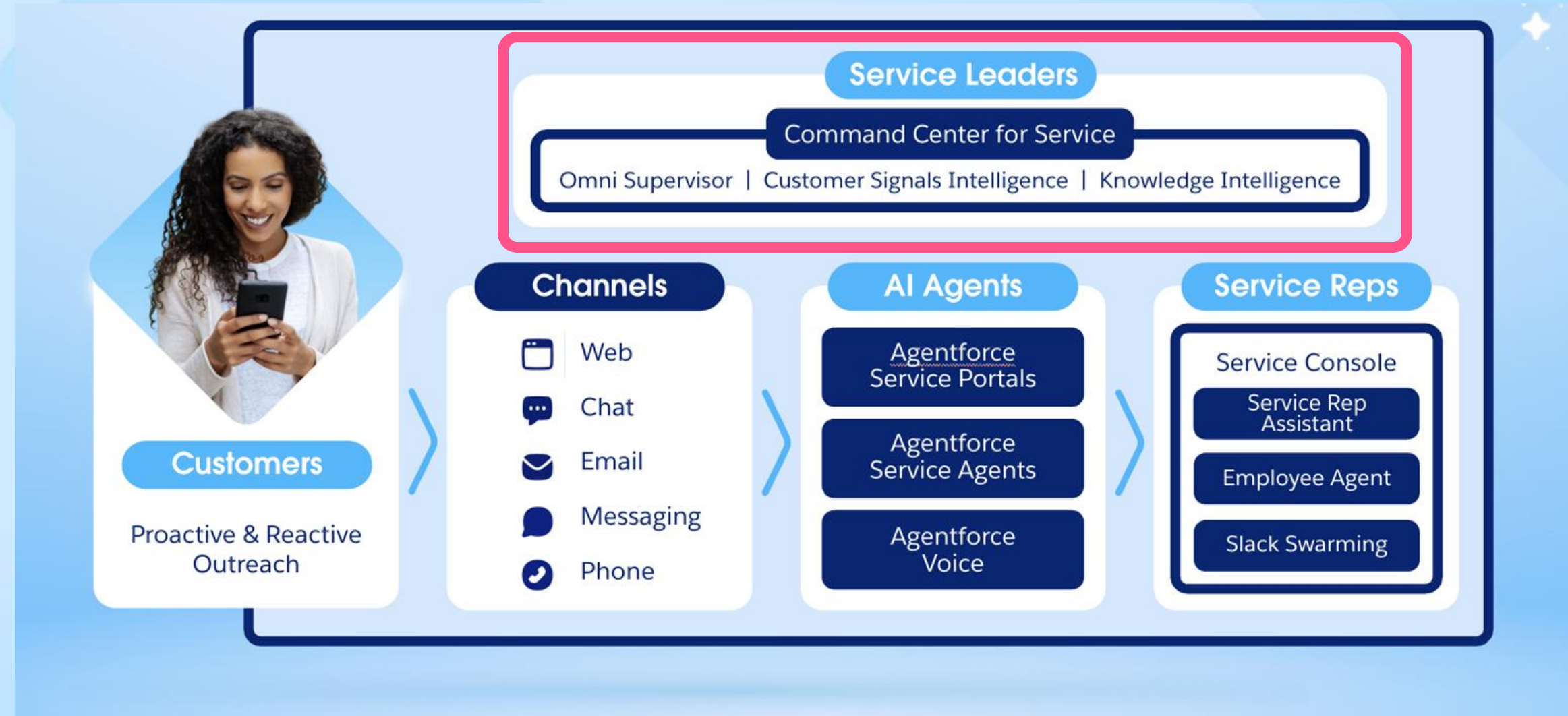
Red circles and lines connect specific interface elements to the callout boxes on the left and right, highlighting key features like personalization, multi-channel support, global language delivery, and AI-guided resolution plans.



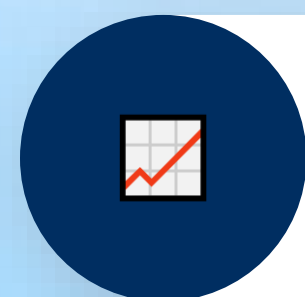
Demo



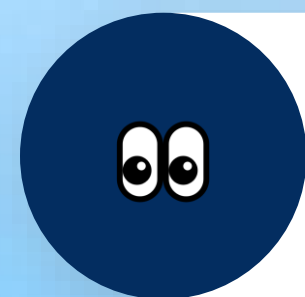
Service Leaders & Insights



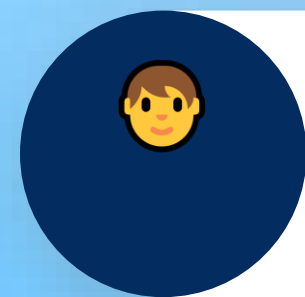
Service leaders scope has increased



Hitting key KPIs



Manage a blended workforce

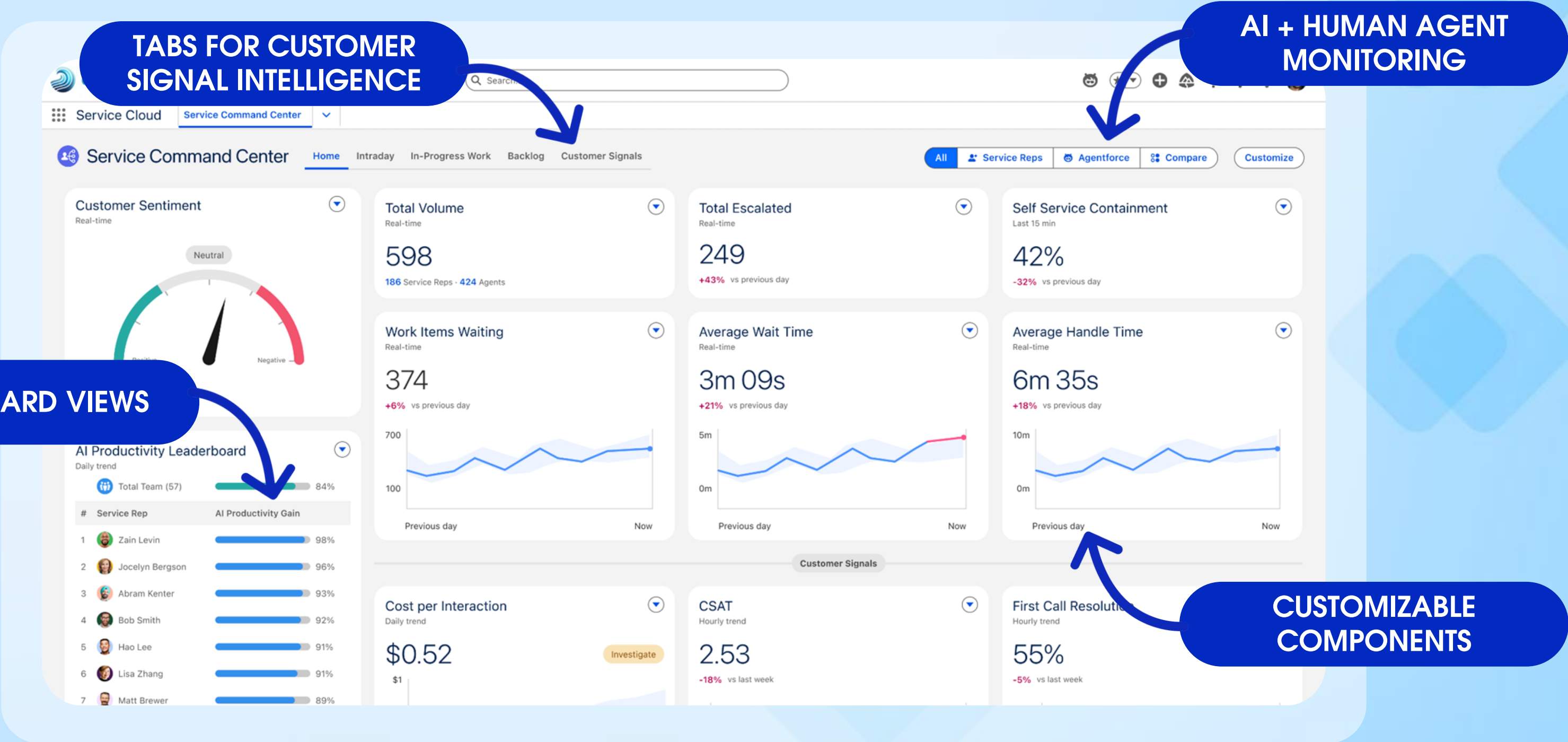


Need for proactive decision making



Service leaders need a Command Center for Service

FUTURE



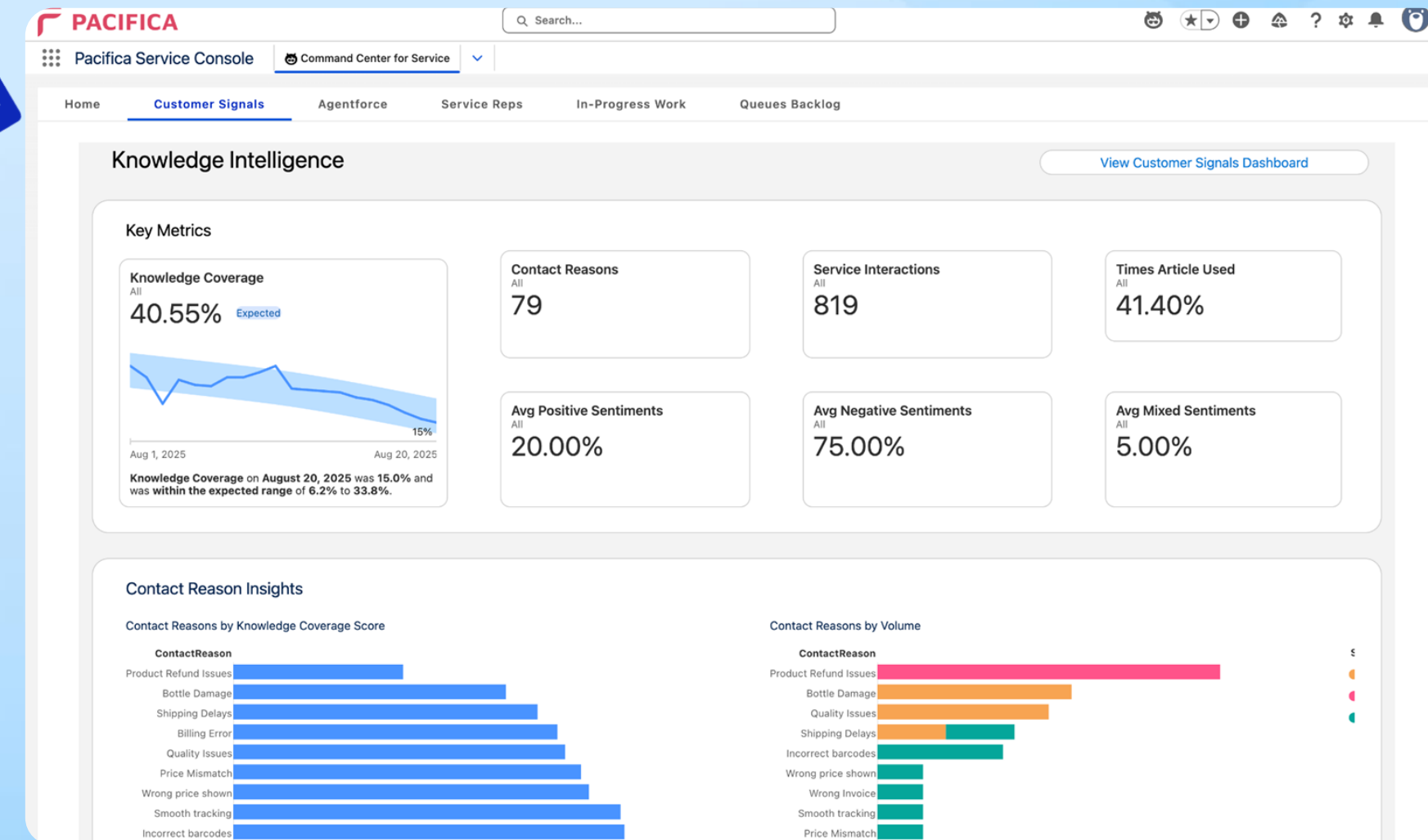
Service leaders need Knowledge Insights to power AI Service



Self Learning Knowledge

Plug gaps in Knowledge by leveraging customer sentiment signals and automated knowledge creation. High quality Knowledge Management is critical to AI Success.

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Enterprise Knowledge

Plug gaps in Knowledge by bringing in unstructured data sources to drive grounding

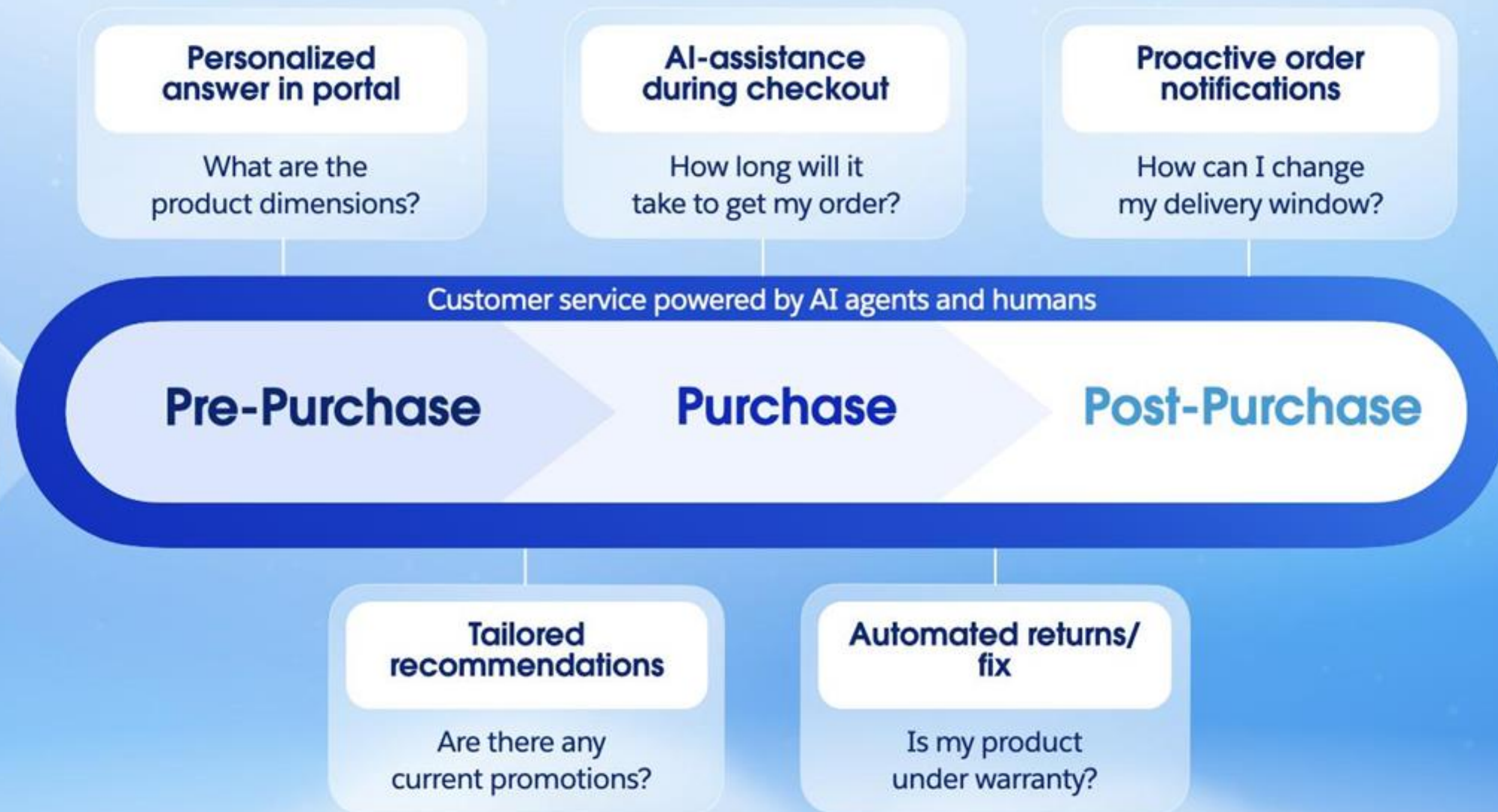


Demo



Today's customers crave smarter, AI-powered service experiences

salesforce



The background is a vibrant blue gradient. It features several geometric shapes: a large light blue diamond in the upper center, a smaller light blue diamond in the lower center, and a large light blue triangle on the right side. There are also several small white stars scattered across the background, some of which are slightly blurred to create a sense of depth.

The result:
service excellence
and growth.



Next Steps

We are all on an *AI* journey



Network with your peers



Come chat with us

Thank you



The result:

boosted customer loyalty and increased revenue

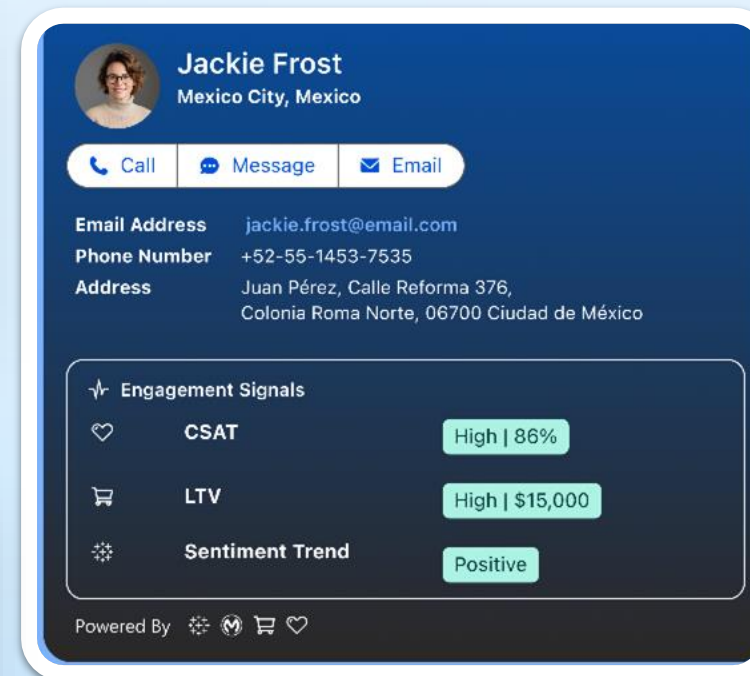
Build a complete customer view

Service Data

CSAT
Past Case Summaries
Call Transcripts
Engagement History

Sales Data

Meeting insights
Call summaries
Email history
Calendar insights



Jackie Frost
Mexico City, Mexico

Call Message Email

Email Address jackie.frost@email.com
Phone Number +52-55-1453-7535
Address Juan Pérez, Calle Reforma 376,
Colonia Roma Norte, 06700 Ciudad de México

Engagement Signals

CSAT	High 86%
LTV	High \$15,000
Sentiment Trend	Positive

Powered By

Deliver service excellence

Personalized engagements

Deeply unified data

Faster resolutions

Empowered CX experts

Transform into an experience center



Roadmap | Agentforce Service Portals

Proactive Service

GA | Feb '26



Event-driven or scheduled Service Campaigns

Marketing

Home

Campaigns

Contacts

Leads

Segments

Identify Resolutions

Content

Proactive Service Scenario

Example Name

Brief

Details

Campaigns

New Flow 2025.01.22.0831

Open Flow

Activate

Status

Last Modified By

Flow Type

Draft

Zoe Martinez

8/9/2024, 2:00 PM

Segment-Triggered Flow

Is this scenario schedule-based or event-driven?

Scheduled

Event DMO

DMO name selected

Run Detection When

Created

Segment Rule

WHEN field\$A EQUALS value\$X AND field\$C EQUALS value\$Y AND field\$D is Greater than value\$Z

Who needs to be contacted?

Create Segment

User DMO

DMO name selected

Population

82,878

Last Refreshed

10/09/2024, 8:00AM CST

How will this issue be resolved?

Service Automation

Resolution Flow

Resolution Type

Description

Last Refreshed

Automation

Lorem Ipsum

10/09/2024, 8:00AM CST

What do you want to communicate?

Selecting Existing Template

Email Name

Draft

Subject Line

(\$Expression.FirstName), Exclusive Offer Just for You in (\$Expression.City) - 20% Off Our Award-Winning (\$Expression.ProductCategory)!

Preheader

Great deals waiting for you inside.

Message Purpose

Promotional

Configuration

Configure

Before you activate this flow, configure the required settings for this element.

From

trish@into.com

Send Time Optimization

Disabled

Communication Subscription

Not Configured

Tracking

Opens: Disabled

Clicks: Disabled

We're deeply sorry about the cancelled flight SWA1035, and would like to make it up to you

Summarize this email

Southwest Airlines support

to Debbie Steiner

Thu, Sep 4, 9:29 AM

Hi Debbie,

We're writing to let you know we're deeply sorry about the unforeseen cancellation of flight SWA1035 on 23rd August 2025. You've been a longtime Southwest customer and frequent flyer, so we'd like to make this up to you.

Please click here to chat with your Concierge Agent, who'll help you choose between different options we're making available to you, to compensate you for your trouble.

Chat with Concierge Agent

We look forward to seeing you on a Southwest flight again soon!

The Southwest Airlines Team

Reply

Reply all

Forward

Actionable Outreach

Service Console

Home

Proactive Services

Campaign Dashboard

Campaign Dashboard

Loyalty Status Upgrade

Started February 16, 2025

Outreach Count

2545

Open Rate

82%

3%

Completion Rate

62%

5%

Bounce Rate

0.5%

0.25%

Related Service Automation

PN-12345

Campaign Performance

Rate

100%

80%

60%

40%

20%

0%

1

2

3

4

5

Customer Insights

Search...

Name	Start Date	Completed Date	Progress
Elle Woods	2/16/25	2/16/25	25%
Kate Houston	2/17/25	2/17/25	100% (2/17/25)
Nelson Gee	Not Started	Not Started	0%
Sam Smith	2/16/25	2/16/25	50%
Paul Kirk	2/18/25	2/18/25	75%
Faye Hughes	2/16/25	2/16/25	100% (2/16/25)
Jake Goss	2/17/25	2/17/25	75%
Nila Balore	2/16/25	2/16/25	25%
Lily Nguyen	Not Started	Not Started	0%

Insights