Thanks To Our Incredible Sponsors

Agenda

WELCOME TO

MARDREAMIN'
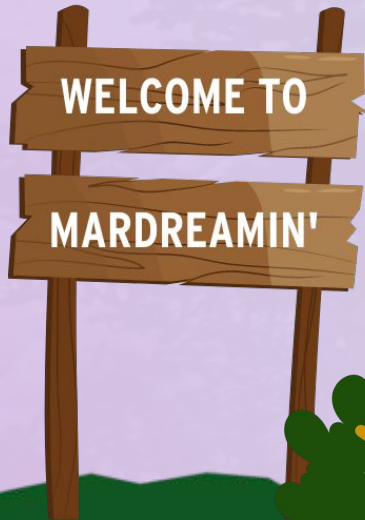
1 Transforming Customer Experiences with Data and AI

2 Building an Effective Data and AI Strategy

3 Bringing It All Together Across the Customer Lifecycle

The AI Opportunity

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Better Productivity

30%

of employee time freed up accelerated by gen AI[2]

Better Relationships

84%

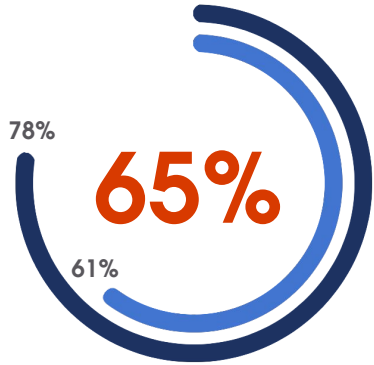of leaders agree gen AI better serves customers[1]

Better Margins

~$4.4T

expected to drive growth, creating demand for skilled talent and contributing to GDP

Sources: 1. Salesforce, Generative AI Snapshot Research Series, 2023. 2. McKinsey, Generative AI & the Future of Work in America, 2023. 3.Upwork, 2023. 4.McKinsey, The Economic Potential of Generative AI, 2023. 5.World Economic Forum, Future of Jobs Report, 2023. 6. NewVantage Partners, Data and AI Leadership Executive Survey, 2022.
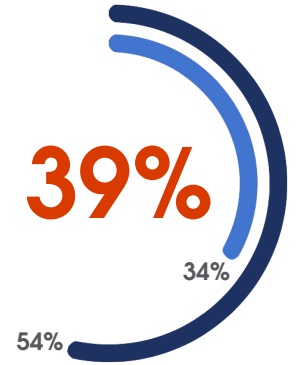
Drive Personalization through Data + AI + CRM

DATA

(1)

Data Foundation

Unlock data from all sources

- Data Sources
- Data Insights
- Data Models
- Available
- Timely
- Security
- Clean

AI

(2)

Predictive AI
+
Generative AI

Create, train, & test models safely

Deploy AI with constant feedback

Human-in-the-loop Outcome Reinforcement Data Masking ZERO Retention Auditing

CRM

(3)
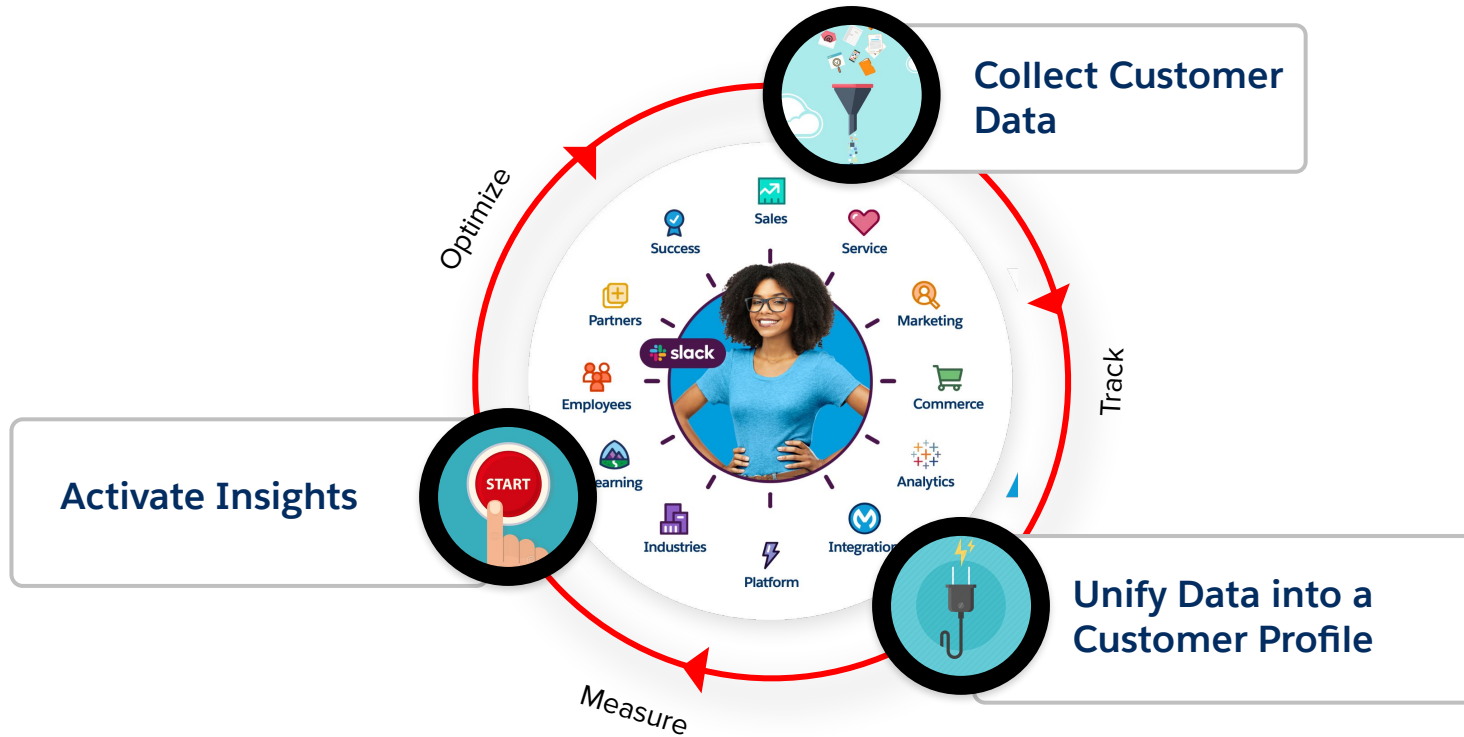
Personalized experiences for every Customer

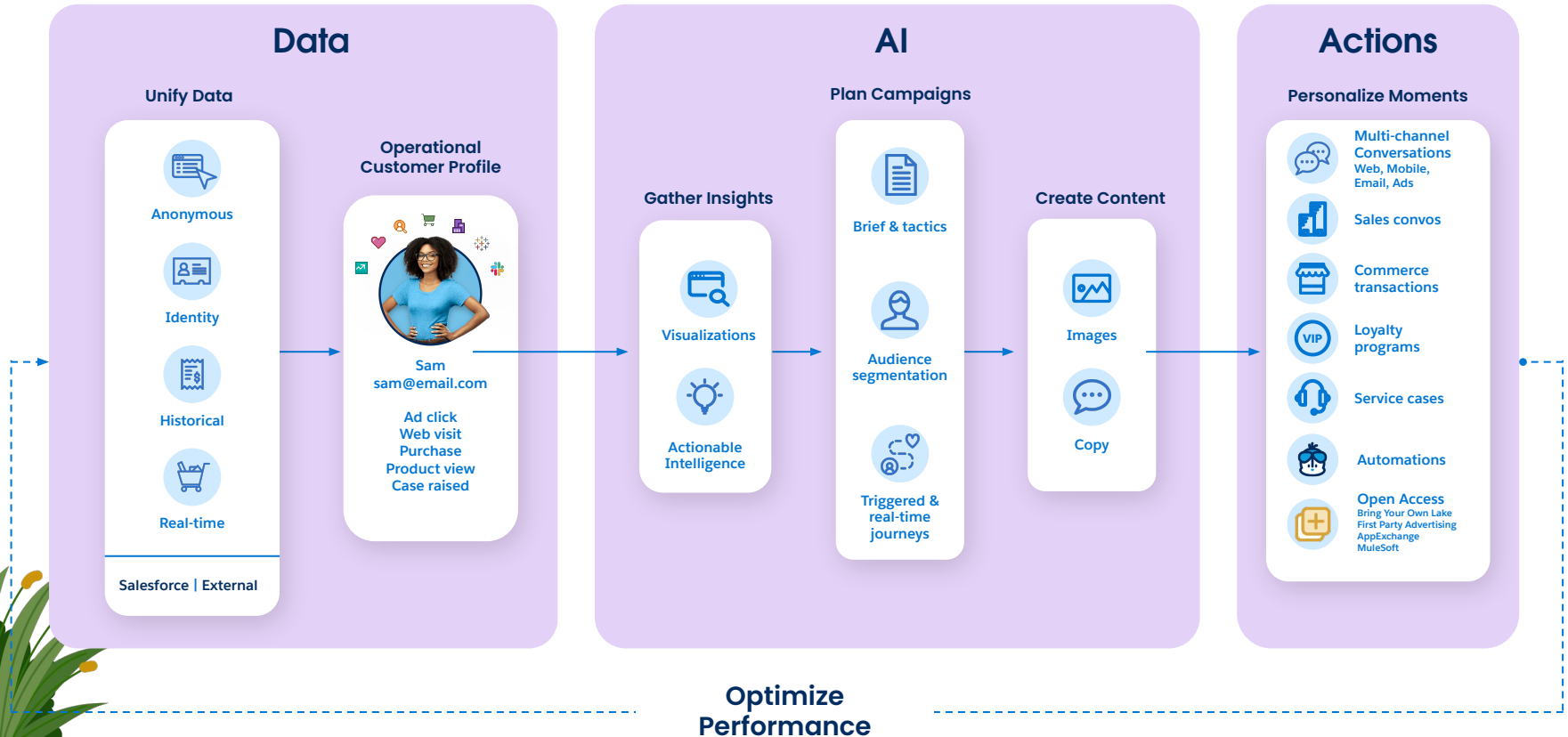*Personalized actions across channels*

Einstein

Send Reply

Einstein
Generated Answer

Power Every Interaction through Data Flywheel

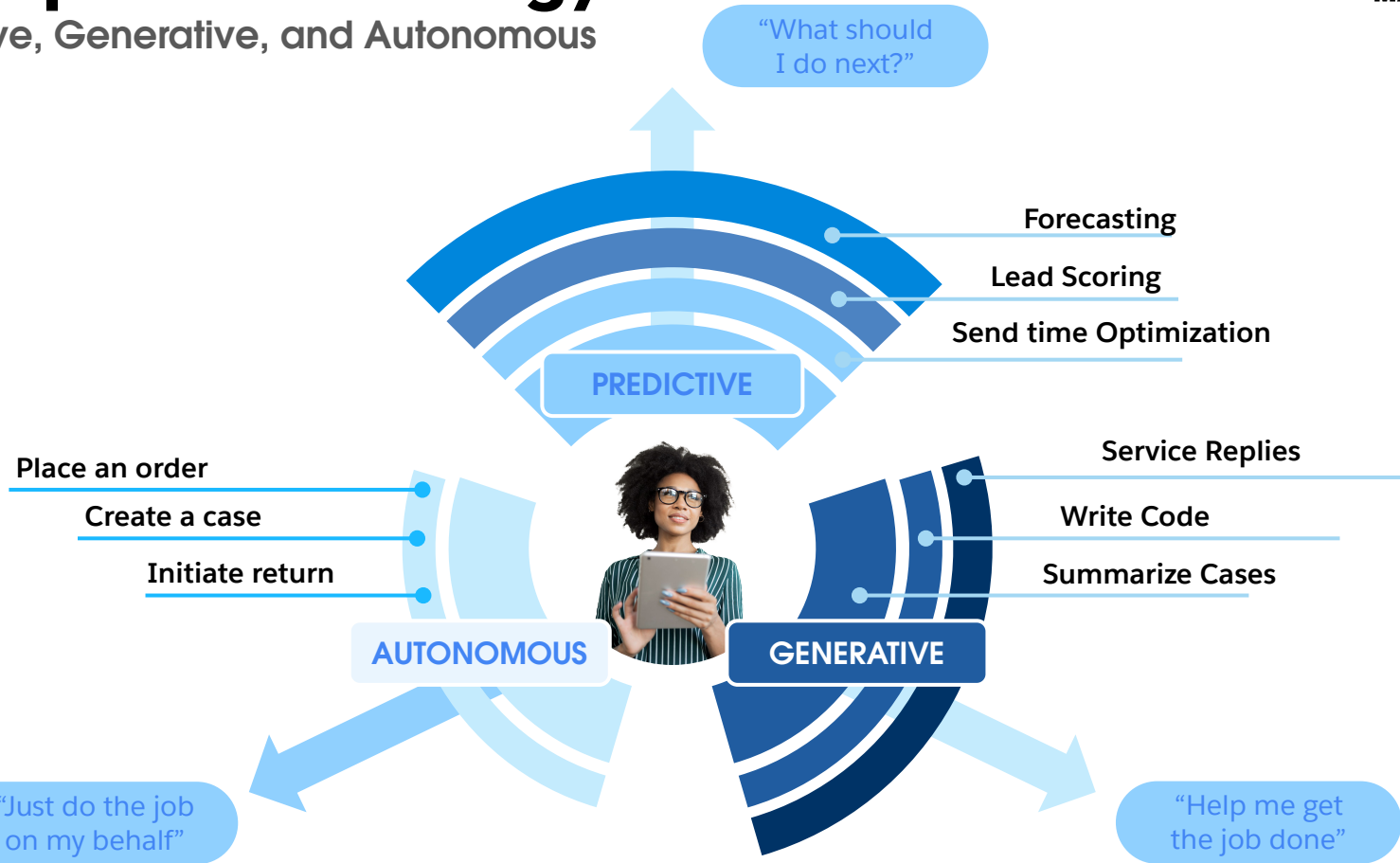# Deliver Personalized, Seamless Customer Experiences at Every Touchpoint

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Data

Unify Data

Operational Customer Profile

Anonymous

Identity

Historical

Real-time

Salesforce | External

Sam
sam@email.com

Ad click
Web visit
Purchase
Product view
Case raised

AI

Plan Campaigns

Gather Insights

Visualizations

Actionable Intelligence

Brief & tactics

Audience segmentation

Triggered & real-time journeys

Create Content

Images

Copy

Actions

Personalize Moments

Multi-channel Conversations
Web, Mobile, Email, Ads

Sales convos

Commerce transactions

Loyalty programs

Service cases

Automations

Open Access
Bring Your Own Lake
First Party Advertising
AppExchange
MuleSoft

Optimize Performance

AI: The Driving Force Behind Personalized, Real-Time Experiences.

Enterprise AI Strategy

Predictive, Generative, and Autonomous

"What should I do next?"

Forecasting

Lead Scoring

Send time Optimization

PREDICTIVE

Service Replies

Write Code

Summarize Cases

Place an order

Create a case

Initiate return

AUTONOMOUS

GENERATIVE

"Just do the job on my behalf"

"Help me get the job done"

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Maximize Human Potential with Agents

Augment Human Strengths

- Relationship Building
- Organizational & Industry Knowledge
- Collaboration
- Goal Setting

"Assist Associates"
Productivity Amplification

"Augment the organization"
Workforce Transformation

Scale with Agents

- Answering Questions
- Collecting Information
- Booking Meetings
- Researching

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How **Agent*force*** works...

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Data

Plans —— **Actions**

AI Agent

You are a **Role**...
You have this **Knowledge**...
You can execute these **Actions**...
You adhere to these **Guardrails**...

Model

⊙ GPT-4   ✦ Gemini

✳ PaLM 2   LLaMA

Claude   stability.ai

MISTRAL AI_   λ Lambda

Response

"I found your order and initiated a replacement. Can I help with anything else?"

Security

Channels
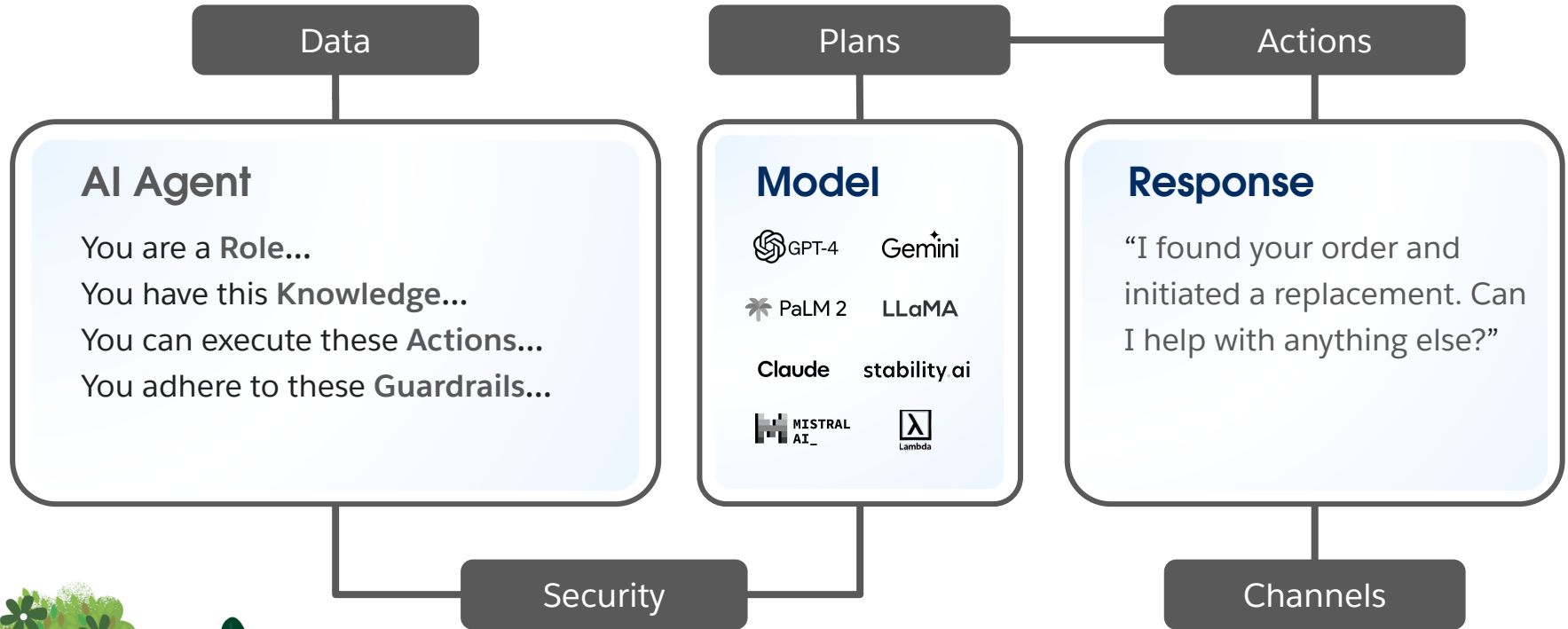
The Salesforce platform brings it together

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Humans ✓ AI ✓ Data ✓ CRM ✓

Agentforce

Support Agents

Sales Agents

Ops Agents

Marketing Agents

CX Agents

Product Agents

Customer 360

Analytics Agents

Banking Agents

Slack

Sales Service Marketing Experience

Tableau

Commerce & POS

Industries

Data Cloud
Zero Copy + Ecosystem

Finance Agents

Revenue & Orders

Health Agents

Success

Trust layer

Partner & Custom apps

HR Agents

| Custom apps & agents | Einstein AI & Models | Flow Automation | **Salesforce Platform** | Omnichannel User Interface | Security & Privacy | Analytics |

MuleSoft Integration

Use Cases Across the Customer Lifecycle

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Awareness
Decrease cost per acquisition through targeted advertising and lookalike modeling to increase awareness of relevant product offerings
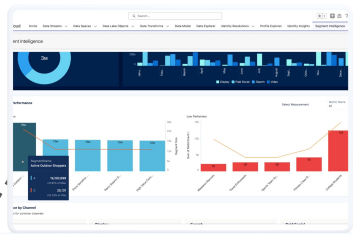
Engagement
Close deals faster by empowering sales reps with the insights and AI-powered recommendations needed to provide personalized offers and cross-sell relevant products, increasing average order value

Loyalty / Growth
Build brand loyalty and expand customer base with "Refer a Friend" program segments that target top referrers with specialized perks and offers
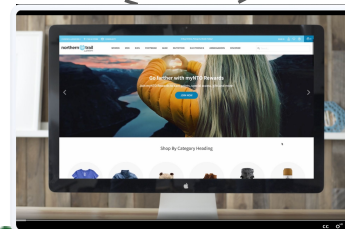
Retention
Improve customer satisfaction with proactive service (e.g., shipment updates, new product releases, restocking, journeys to address trending issues) on customers' preferred channel, to prevent returns and drive repeat purchases
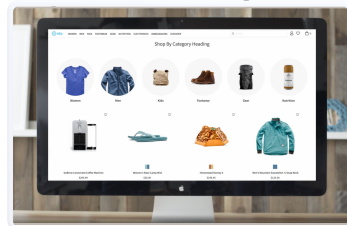
Conversion
Increase conversion through personalized shopping experiences, with follow-up communications, recommendations, and personalized web experiences based on previous engagement and purchases