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salesforce

Unlocking Dreamforce: Key Takeaways & Insights

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Welcome!

Our 2024 Dreamforce insights guide is designed to provide you with key takeaways on industry trends and Salesforce capabilities. Use the Table of Contents to navigate directly to the sections that interest you most.

At Slalom, we aim to empower you with the latest knowledge to drive innovation and success. **So, dive in and discover what actionable steps you can take for your organization's growth.**

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Dreamforce Industry Insights



DREAMFORCE

Insights for Banking

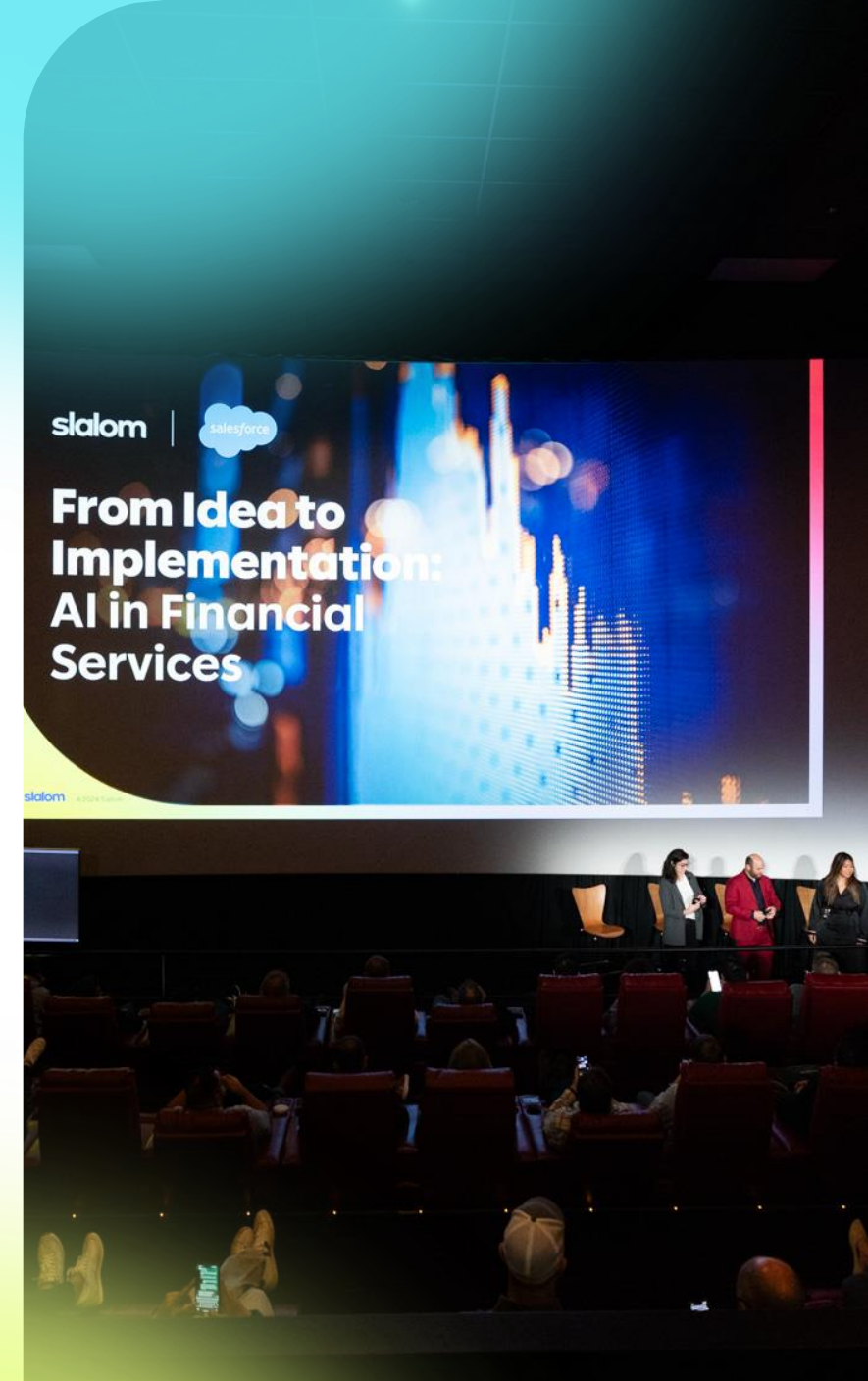
Dreamforce 2024 featured the evolution of AI with the rebranding of Einstein Copilots to Agentforce. This year, attendees experienced groundbreaking innovations in personalized banking solutions and data-driven customer engagement strategies.

Attendees also explored the latest trends in financial technology on the Salesforce Platform, with Salesforce's Financial Services Cloud leveraging the power of AI to provide scale and efficiency to customer service representatives.

The conference emphasized the importance of security and compliance in financial services, ensuring that all innovations meet regulatory standards, while allowing AI Agents to hand off to humans with context in the moment. Briefly recap the overall excitement and energy of Dreamforce 2024.

Learn more:

- Watch Slalom's Allen Mann and Chris Hale, as they talk about [AI in Action on Salesforce](#).
- [Watch the Financial Services Keynote: Grow Revenue Faster with Purpose Built AI for Financial Services](#)
- Find out more about Slalom & Financial Services [here](#).



Key Takeaways for Banking

“ These innovations are not just enhancements; they are essential for the future of commercial banking. By leveraging AI and data-driven strategies, we are paving the way for more secure, efficient, and personalized banking experiences that meet the evolving needs of our clients.”

Erin Agrios

SVP & GM, Financial Services
Salesforce

Salesforce Boosts Secure AI for Financial Services

Operating within a regulated industry, Salesforce is addressing the demand for more secure and compliant AI solutions geared towards financial services, offering suitable guidelines and frameworks to balance innovation with responsibility.

Salesforce Unveils New B2B Innovations

Salesforce unveiled a renewed emphasis on B2B innovations, including upgrades to the Actionable Relationship Center to manage intricate business and personnel hierarchies. Additionally, new features for creating Business Relationship Plans will aid bankers in analyzing months of interaction data in their commercial banking relationships.

Agentforce Enhances Service Studio with 30 Customizable Processes

Agentforce has now enhanced Service Process Studio, enabling humans to concentrate on the crucial moments that matter. There are 30 pre-built processes that can be cloned and tailored to suit an organization's requirements.

DREAMFORCE

Insights for Insurance

By far, the most valuable session for Insurance at Dreamforce this year was the Roadmap for Financial Services Cloud (FSC) for Insurance.

In recent product releases, it seemed like Insurance had taken a back seat. However, at Dreamforce '24, Salesforce unveiled significant and highly anticipated product enhancements specifically for Insurance.

Learn more:

- [Watch the Financial Services Keynote: Grow Revenue Faster with Purpose Built AI for Financial Services](#)
- [Hear from global financial services brands and experts](#) who share how they grow revenue with data and trusted AI to create lifetime customer loyalty and success using Salesforce.
- Find out more about Slalom & Financial Services [here](#).



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Key Takeaways for Insurance

Learn more:

- Watch this amazing session: [Balance Empathy and Efficiency in Insurance Customer Service](#)
- Connect with the [Slalom Salesforce Financial Services team](#) to learn more!

Salesforce Reveals Insurance Roadmap with Advanced Account Management

Salesforce has unveiled the roadmap for Insurance on FSC, featuring significant upgrades to account team management. These developments are highly anticipated by both insurance and wealth management companies seeking a solution. Enhanced producer split management, reusable split definitions, bulk split reassignment, and role-based explicit splits all contribute to an adaptable framework designed to address the need for advanced compensation management!

Salesforce Develops Next-Gen Pricing Engine for Insurance

Salesforce has also put focus on creating a next-gen pricing engine, built on the Business Rules Engine (BRE), that provides attribute-based pricing, ties the product catalog to product rules and underwriting rules.

Salesforce Enhances Insurance Product Setup with Dynamic Attributes

A significant product enhancement – Salesforce is working to streamline the capability to set up insurance products on the platform with dynamic attributes – like Coverages on a product. This will unlock the ability to report on those attributes and improve the time to value for product setup.

Salesforce Innovates Modern Agency Management System for Brokerages

Salesforce is also working to create a modern agency management system that is extensible – FSC for insurance brokerages with prebuilt components that can be extended and customized. A key focus is to unlock trapped data, gain efficiencies and leverage the FSC product capabilities.



DREAMFORCE

Key Takeaways for Wealth & Asset Management

With AI advancement on the Salesforce platform, Wealth Management firms can truly maximize their tech investments, which has become a compelling theme by many leaders in the Wealth and Asset Mgmt. space.

By working with AI Agents, financial advisors and firms can securely and quickly automate key components of generational wealth transfers and prevent significant asset loss in the short and long term. By enabling advisors with AI agents to handle relationship analysis, beneficiary identification, and portfolio management, advisors can truly focus more on what matters, identifying and growing key relationships, and less on mundane repeatable tasks.

Learn more:

- [Prep for the Pivot: Transforming Wealth with Data and AI](#)
- [Watch the Financial Services Keynote: Grow Revenue Faster with Purpose Built AI for Financial Services](#)
- Find out more about Slalom & Financial Services [here](#).

Key Takeaways for Wealth & Asset Management

“ It's really easy to see all these shiny objects and generative AI and want to start exploring right away. Zoom out and think about: 1. the experience you and your firm want to drive, 2. the business process you want reps to play in driving that experience, and then bring in the technology that you want to supercharge and enable it. Otherwise, the utilization and business outcomes you're striving for just won't happen.”

Brad Moreno

SVP & GM, Financial Services
Charles Schwab

From the session: [Prep for the Pivot: Transforming Wealth with Data and AI](#)

AI Agents Empower Advisors in Generational Wealth Transfer

We're still talking about the generational wealth transfer! Except this year, the discussion has turned to how we can enable advisors with AI agents so that they can focus their efforts where it matters most – building trust and relationships!

Addressing Advisor Attrition in Wealth Management

One of the biggest challenges for Wealth Management firms is advisor attrition and taking their book of business with them. Being able to identify the key markers for that advisor attrition, firms can proactively take steps to reduce the impact of that attrition and work to stop the attrition all together.

AI and Human Advisors Boost Productivity and Profitability

By pairing AI agents with human advisors and allowing that transfer from agent to human with the appropriate context, there are productivity and efficiency gains that are not just cost savings but also can be attributed to profitability of the firm.

Salesforce Enhances Agentforce for Financial Services Compliance

Salesforce seems to have recognized the challenge that financial services organizations have with being a regulated industry in the age of Agentforce. They are working to build the appropriate trust, compliance, and security controls within their Agentforce capabilities. The message was clear – we realize agents can't give advice, but they can enable the advisors with information to proactively advise their clients.

Insights for Healthcare

Dreamforce brought innovation to life in healthcare this year, making so many of the promises of patient centricity, efficiency, advanced care management, and (of course) AI feel real for the first time. Salesforce's announcements like Agentforce, real-time authorization, and integrated evidence-based care guidelines reiterate their commitment to making the patient and member experience as delightful as what we experience in the rest of our everyday lives.

Learn more:

- Thinking of building a patient access or member service contact center on Salesforce? Watch [Penn Medicine's webinar with Slalom and Salesforce](#), and reach out to see how Slalom can support you!
- Agentforce and Generative AI will require data strategy, harmonization, and access in your Salesforce engagement layer. Slalom's Data Cloud and Salesforce for Healthcare practices can support you in defining those data governance requirements, architecture to access data where you need it, and strategies to leverage these new technologies in a compliant, safe, and patient-centered way. [Connect with the Slalom Salesforce Healthcare team](#) to learn more.
- Watch the [Health Keynote: Transform the Patient & HCP Experience with AI-Powered Connections](#)



Key Takeaways for Healthcare

“ We’ve been able to serve patients the first time [across five million phone calls per year] at a 95% first-call resolution rate... and went from a six-and-a-half-minute call to a four-and-a-half-minute call.”

Cecilio Murillo

System VP, Ambulatory Access Strategy & Operations, CommonSpirit Health

Investing in Public Health Beyond the Pandemic

Salesforce provided disease surveillance, vaccine management, and contact tracing capabilities early in the COVID-19 pandemic, and doubled down on their focus on public health at Dreamforce.

Announcing a dedicated platform for Home Healthcare, reiterating their support for Vaccine Management, and announcing a Disease Surveillance capability for the February '25 release, Salesforce continues to expand beyond traditional payer and provider service and marketing use cases.

Agentforce and Targeted AI

Marc Benioff’s keynote address highlighted the challenges of basic appointment scheduling, caregiver burnout and turnover, and the wild inefficiency of manual processes in healthcare operations.

Sophie, the Saks virtual agent built on Salesforce, wowed the room with her ability to answer detailed questions with detailed, relevant answers, and it was easy to see how a virtual agent like Sophie could deflect the 15-20% of calls that many health system contact centers get for driving directions, appointment instructions, and other basic information.

Depth in Care Management

Blue Shield of California’s team shared their investments in clinical care management on the Salesforce platform, demonstrating the depth of growth in deep domains like clinical decision support, medication management, and true member-centric care management.

Consolidating thirteen applications into one Salesforce platform, Blue Shield of California brought consistency to their care management workflows and showed the depth of Salesforce’s capabilities as a payer workflow platform.

DREAMFORCE

Insights for Life Sciences

With the launch of Life Sciences Cloud earlier this summer, Dreamforce participation by Life Sciences companies exploded in 2024. The promise of an end-to-end CRM solution for Pharma companies is exciting, yet customers are looking for more answers on product features and capabilities for customer engagement use cases. (The Life Sciences Cloud data model for customer engagement will be released in November 2024 and Life Sciences Cloud for customer engagement will be GA September 2025.) Life Sciences sessions were so full that some customers weren't even able to get in the door!

Innovation and improved effectiveness through personalization and AI is the promise, and organizations using the Salesforce/Veeva divorce as an opportunity to advance process to maximize the use of Salesforce Life Science Cloud capabilities, especially AI, will likely come out on top. Some highlights of the features available today include Einstein candidate matching for clinical trials and streamlined patient recruitment – both of which Slalom supported customer Protas in designing for their clinical trials business.



Key Takeaways for Life Sciences

“ We’re moving the industry forward so that Life Sciences Cloud CRM won’t just be seen as the system of record, but the system of insight.”

Frank Defesche

GM, Life Sciences Cloud,
Salesforce

Patience and Trust

As Salesforce builds Life Sciences Cloud for customer engagement, Salesforce is asking customers for patience and trust as they know customers want and need more product details, and Salesforce also needs to get further in product development. While there were no new announcements of Global Pharma customers who have selected Life Sciences Cloud at the show, there is excitement around what is being built and in talking to customers, they do trust that Life Science Cloud will offer greater advantages in AI and personalization than other options.

Human Capital will be a limiting factor

Given that every pharma organization who uses Veeva CRM or IQVIA OCE must migrate to a ‘new’ solution by 2030, demand for qualified systems integrators (SIs) will quickly exceed supply. Companies are nervous about this, and we believe the entire ecosystem will have an opportunity to work together and partner, as well as compete, in new ways.

Companies are organizing now

Most organizations are doing assessments now which include creating a roadmap for product selection/migration, analyzing business processes, data, and integrations, understanding customizations, etc. We were impressed by the work that Allergan has done for territory management and believe this is an area where other organizations could start building now and capitalize on generative AI and access to more data will only improve the effectiveness of customer engagement.

Learn more:

- Watch the [Health Keynote: Transform the Patient & HCP Experience with AI-Powered Connections](#)
- [Connect with the Slalom Salesforce Healthcare team](#) to learn more.



DREAMFORCE

Key Takeaways for Travel, Transportation & Hospitality

Dreamforce ushered in a new era of digital hospitality underpinned by Agentforce. For travel & hospitality companies, this means capabilities that create effortless guest experiences and enhanced hospitality that make customers feel valued and understood. For logistics companies, the combination of next-gen digital assistants and data cloud increases productivity and leverages data-driven insights to sell smarter and decrease churn. Loyalty

Leading companies will use data as the bedrock for a customer-centric strategy that enhances traveler experiences and increases loyalty. Salesforce's suite of capabilities is poised to deliver more value and more unforgettable experiences.

Learn more:

- Watch Slalom's Allen Mann and Chris Hale, as they talk about [Alin Action on Salesforce](#).
- Learn how [Virgin Voyages](#) reshaped the chatbot experience and launched one of the first generative AI-powered digital humans built on Salesforce

Key Takeaways for Travel, Transportation & Hospitality

“ An FAQ article is not digital hospitality. Anticipating the needs of our customers before they even realize it, that’s where we want to be.”

Sarah McDonald

Senior Technology Consultant, Southwest Airlines

Accelerate Growth

New buying patterns have emerged, and companies must unify & consolidate profiles to better understand customers. 40% of customers plan to travel more this year. By harnessing data captured at every interaction, companies will deliver Digital and in-person experiences improve loyalty through rewards, predictive service and upsell offers.

Automation

Remove redundancy that benefits customers and increases employee productivity and collaboration. Next-gen Agentforce creates more time for more consuming workloads.

Digital Hospitality

Companies must go beyond chatbots and provide dynamic customer experiences in which travelers seamlessly communicate with brands. 70% rate their experiences on the ways they feel treated. Accurate and holistic personalization ensures consistent, and highly individualized service across all channels.

Sustainability

Customers are making decisions based on commitments to sustainability and Digital transformation requires a better understanding of carbon footprint and operational efficiency improvements. A staggering 83% of travelers confirm that sustainable travel is important to them so sharing progress toward sustainability goals will create customers for life.

DREAMFORCE

Insights for Consumer Business Services

Professional services, real estate, construction, and consumer services firms are thrilled with Dreamforce 2024 innovation announcements. Agentforce allows users to build personalized, digital assistants for sales, operations, and service teams and allows firms to engage with prospects differently, use predictive analytics to provide price-optimized offerings, manage negotiations more seamlessly, and deliver more value against rising customer expectations.

Business firms are at a critical juncture. Firms need to find ways to accelerate and sustain value delivered to their customers while still navigating their own digital transformation. Leading firms are developing new capabilities to generate sales and services that are more data-driven that make them better positioned to differentiate themselves from the competition.

Learn more:

- Watch Slalom's Allen Mann and Chris Hale, as they talk about [AI in Action on Salesforce](#).



Key Takeaways for Consumer Business Services

“ People want to create amazing things and reimagine what’s possible. But we all want to lead with trust and use these tools ethically and responsibly. So, give them the freedom to do augment, automate and accelerate on their own terms, safely.”

Lisa Adams

Counsel, Global Marketing, Privacy & Communications Legal, Salesforce

Revenue Growth

Use data to drive personalization to make insight-driven decisions and drive revenue. Deliver frictionless, multichannel experiences to accelerate buying and purchasing decisions. Unlock data from external systems into one complete view and leverage AI insights to predict behavior and provide offerings that drive revenue upside.

Talent Management

Firms must attract and retain the best skills to solve the most challenging problems. Growth hinges on employees’ ability to learn and grow. Build employee loyalty by removing friction and using modern AI tools to empower employees to develop skills and maximize their performance.

Enhanced Service

Adapt to changing expectations and construct a consistent end-to-end service experience to alleviate experience gaps & pain points. Centralize interactions between customers, partners, suppliers, contracts, legal, and commissions. Automate across disparate systems Utilize your entire ecosystem of data and capabilities.

Streamline Operations

Slow economic growth in the first half 2024, firms must manage operating expenses with greater scrutiny. Use future-forward analytics to project future cash flows and assess risk to models for optimal solvency. Focus on supply chain and enable access to sustainability data from any device. Provide employees and partners with insights and recommended actions to track & reduce carbon footprint.

DREAMFORCE

Insights for Manufacturing

Industry 5.0 is where connected machines and AI will converge to offer new levels of service and experience for both employees and consumers. The unlock and connection of IoT to customer engagement platforms at scale will be transformational and be a key contributor to the Autonomous Economy.

Learn more:

- Watch the [Manufacturing Keynote: How Data and AI are Shaping the Future](#)
- [Will Servitization Become a Differentiator and Driver of Revenue Growth for the Aftermarket?](#)
- [Watch](#) how manufacturing, automotive, and energy and utilities leaders use Salesforce industry-specific innovations to drive profitable growth and exceptional service with CRM + AI + Data + Trust.



Key Takeaways for Manufacturing

// 75% of service leaders anticipate a transition to servitization models in the next two years.

Jul 2024

[IDC Survey Spotlight](#)

GET STARTED

- Explore new selling strategies and service offerings that represent new sources of revenue. Evaluate ability to execute consumption or subscription-based services.
- Conduct end-to-end service design workshops to identify opportunities for IoT data and AI Agents to improve overall service delivery and performance (e.g., first call resolution, service capacity, new service agent/technician onboarding)

Asset Monetization

IoT data provides insights into customer usage, operating efficiency, and supply chain optimization. New offerings related to both selling new equipment and the service of existing equipment are being positioned in the market and accelerating the harmonization of assets (equipment) and customer data.

Omni-Channel Quote to Order

The transition of Salesforce CPQ to core Salesforce platform (i.e., “RLM” or “Revenue Cloud”) will accelerate the alignment of quote to order processes across all inbound sales channels. Product and pricing guidance can be centralized and seamlessly offered to both internal employees and self-service customers. Customers can expect to see lower overall costs of sales operations, an increase in overall sales capacity, and decline in revenue leakage.

AI Enabled Service Expertise

AI drive “Product Experts” will support service technicians on diagnostics, parts, and repair procedures. Companies can mitigate the risk of losing institutional legacy product knowledge as experienced master technicians move into retirement. In addition, the onboarding of new service technicians will accelerate; first call service resolution will increase; and service capacity will increase.

Key Takeaways for Auto

Automotive Cloud announced expanded functionality and integrations for connected cars. Researchers predict over 80% of cars will be connected by 2030. This trend will elevate customer experience with connected cars across sales, service, and finance operations.

Vehicle Screen Battle

OEMs want customers to plug in directly to vehicle applications and not use Apple CarPlay. This will enable OEMs to enable subscription services on-demand and deliver a more personalized driver experience from vehicle. OEMs admit that Apple CarPlay is the dominant interface.

Fleet Management First Mover

Surfacing key data from telematics/IoT data lakes will enable service offerings that are scalable and pro-active. Fleet Management will be the first mover as customer stakeholders will want to have greater insights on fleet uptime, utilization, safety, and driver behavior.

Dealers Still Play a Critical Role

The role and services offered by a dealer will change but their role is still necessary. In addition to parts and service, which are the primary contributors to profitability, dealers must offer digital services to support the customer desired experience ~ online scheduling, connected car activation, OEM engagement, etc.



Learn more:

- Watch the [Automotive Keynote: Turning Vehicle, Driver, and Finance Data into Revenue](#)
- Auto/truck groups offer B2B Fleet Management Services. How will connected vehicles impact their business operations? Watch this session: [Turning Vehicle, Driver, and Finance Data into Revenue](#)

Key Takeaways for Energy & Utility

Like manufacturing, in addition to operational resilience, connected assets (i.e., meters, transformers) in the energy and utility space offer opportunities to scale customer service at lower costs through data and AI.

Flexible Service Capacity

Customer service and support demands spike during outages and storms. Service Agents built on Agentforce can support these surges across multiple channels (online, phone, text, etc.).

Field Service Automation

Several customers (PG&E, FPL) presented end-to-end service management for storm management, standard maintenance, outage management and vegetation clearing. Increase of first service resolution and field crew utilization were common outcomes.

Smart Meter Analytics

New digital meters offer the opportunity for utilities to provide customers with greater insights on their consumption. Commonly used for billing and outage management, smart meter data can be presented to customers with more personalized insights to compare their consumption and explore opportunities to conserve.



Learn more:

- View this keynote on [AI and the Energy Transition](#)
- View this session on [Fast Track for AI and Data Projects](#)

Insights for Retail, Consumer Goods & Commerce

Dreamforce 2024 showcased a plethora of groundbreaking advancements tailored specifically for the retail, consumer goods, and commerce sectors. Key highlights included the ability to:

- Unify all your data and be able to personalize experiences with a single customer profile.
 - Set goals-based commerce to empower AI to achieve your business outcomes.
 - Automate merchandising with Agentforce Merchant Agent.
 - Engage with shoppers and buyers on all touch points with Agentforce Personal Shopper Agent and Buyer Agent.
-
- The next generation of [Commerce Cloud](#) unifies every element of commerce – B2C, DTC, and B2B Commerce, Order Management, Payments, and more – on a single, integrated platform powered by enterprise-wide data and trusted AI.
 - In addition, Commerce Cloud announced three Agentforce Agents – Merchant, Buyer, and Personal Shopper – which can autonomously manage a range of tasks, including product recommendations and order lookup, without the need for direct human supervision.



Key Takeaways for Retail, Consumer Goods & Commerce

Learn more:

- [Watch the Commerce Cloud Keynote: How to Increase Revenue & Lower Costs With Agents](#)
- [More on Commerce Cloud innovations](#)
- [See more Announcements from DF 2024](#)

Salesforce Innovations

Salesforce is driving innovation for its customers, including enterprise commerce with Agentforce, personalized shopping, and international expansion with strong support from partner network.

AI in Retail

Sessions focused on AI's role in revolutionizing shopping, productivity, consumer experiences, and marketing.

Retail's AI Revolution: How Generative AI Transforms Shopping

Discover the game-changing Generative AI influence on shopping, productivity, consumer experiences, and marketing.

Commerce

Commerce capabilities are coming to more products with new editions including pay now and reorder portals enhanced by shopper and buyer facing AI agents.

The Rise of Chinese Marketplaces

Analysis of platforms like Temu, Shein, and Adopt, noting their strengths in gamification, agile supply chains, and data collection, as well as challenges in trust, quality perception, and customer service.

Consumer Goods Innovations: AI, B2B + B2C Data, and Einstein

A deep dive across Consumer goods innovation on how they leverage data, AI, CRM, and trust to deliver profitable growth.

Salesforce as an Ecosystem

New Commerce Cloud Growth, Advanced, and B2C Premium Editions include combinations of B2B, D2C, B2C, Service Cloud, Agents, Data Cloud, Order Management, Analytics, and Knowledge – everything you need to run your business on Salesforce.

Keynote Speaker

Kate Hudson discussed brand building in a dynamic career landscape.

Key Takeaways for Telecom

Overall, the key theme for Telco at DF this year was the focus on AI leveraging Agentforce in the areas of Sales, Service (including Field Service), Marketing, Revenue Ops, and overall automation.

Two key areas of focus specific to Telecom were the use of Industry frameworks such as TM Forum APIs and new features in Communications Cloud product beyond the middle-office such as Field Service Asset Lifecycle Management and several AI driven use cases.

Learn more:

- [Watch the Communications Cloud Keynote: How AI Helps you Grow Revenue](#)
- [Watch](#) how Trailblazers in communications, media and entertainment, and technology are using Salesforce industry-specific innovations to drive efficiency and provide exceptional customer experiences.

Salesforce Expands with Data Cloud and Field Service

Salesforce's product roadmap focusses beyond middle-office such as Data Cloud, Agent Console, Billing Inquiry management, Field Service for Comms and Dispute management over arched by Agentforce to drive automations.

Telcos Focus on Revenue, Cost Reduction, and Digital Services

Key focus for Telco companies today is to grow Revenue, Reduce Operational Costs, Leverage Data & AI, ensure trust and compliance and drive digital self-service experiences.

Platform Upgrades: Core Engines, Sandbox Boost, TMF APIs

Focus on transforming platform experience by leveraging Engines from Core (New Revenue Cloud/ RLM components), increasing Sandbox Storage Space, Cache management and focus on TMF Open APIs.

AI Upselling and Offer Matching in Salesforce by Feb '25

Focus on AI use cases on roadmap such as Predictive Upselling and Offer Matching to be available in Feb'25. Agentforce Presales Conversational Agents on future roadmap. Already GA features like Quick Quote using Agentforce and Billing inquiry/dispute management.

Comms Cloud Strategy: Core, AI, Sales, Service, Platform

Comms Cloud Roadmap strategy: 1) Fully Leverage the Core 2) AI and Data 3) Sales Automation 4) Service Excellence 5) Ease of platform.



DREAMFORCE

Insights for High Tech

At Dreamforce 2024, a key theme for tech industry clients was maximizing the potential of AI to transform business processes. Salesforce showcased Agentforce, emphasizing its ability to automate complex workflows and provide industry-specific solutions through intelligent agents. These agents can autonomously handle tasks like managing customer interactions, generating insights, and driving operational efficiency across sales, marketing, and service sectors.

The focus on AI wasn't just about automating tasks but enabling companies to personalize their customer interactions, enhance employee productivity, and make more informed decisions through integrated data. AI was presented as a driver of efficiency and competitive advantage, especially in areas like customer service and sales, where companies could utilize custom agents to manage tasks autonomously and scale operations without additional human input.

The tech industry's takeaway was clear: AI isn't just a tool but a strategic asset that can improve time to value, optimize workflows, and deliver personalized experiences. By leveraging AI through platforms like Salesforce, businesses can not only streamline operations but also innovate at scale.

Key Takeaways for High Tech

“ By the year 2025 we will have created 463 Zeta bytes of data.... that’s a value worth \$229B... that’s a lot of data and it can be overwhelming to manage”

Lenore Lang

EVP, Technology, Media & Telecommunications
Salesforce

Learn more:

- Check out the high-tech industry keynote from Dreamforce 2024 [here](#).
- Discover [Agentforce](#) and see how you can harness the full potential of AI.

Data Strategy is Essential

Having a well-defined data strategy is no longer a "nice to have"; it's critical to your business growth and success. Data should be treated as a core asset.

AI and Human Expertise Combined

The power of AI grows exponentially when combined with human expertise. With solutions like Agent Force, human intelligence and AI-powered agents can work together to transform how businesses operate.

Actionable Data and AI in Real Time

The true advantage comes from harnessing data and AI not just for insights but for actionable, real-time results—whether you're operating virtually or in person.

Harnessing AI with Salesforce

Unlocking the full potential of AI requires integrating it seamlessly into your operations. The Salesforce platform allows you to combine all your data into one seamless experience, enhancing team efficiency.

Scaling Operations through AI

AI-powered agents give businesses the ability to scale efficiently and at unprecedented levels. This scalability is key to meeting the growing demands of today's tech landscape.



DREAMFORCE

Key Takeaways for Nonprofit Cloud

Agentforce was certainly the most used word at Dreamforce and its benefits are being rolled into the Nonprofit Cloud solution. A few “agents” already created to help your organization be more efficient and effective are:

- Donor support agents,
- Volunteer services agents,
- Client support agents,
- Call center agents, and
- Grantee support agents.



86% of nonprofits are using digital channels to fundraise. Those nonprofits saw a 41% revenue increase from frequent and consistent communication with online donors.

[Salesforce Nonprofit Trends Report 6th Edition](#)

Key Takeaways for Nonprofit Cloud

Learn more:

- Check out the [Salesforce+](#) session “Innovation for Nonprofits: Salesforce for Nonprofits Roadmap” to learn about the exciting features and capabilities coming to Nonprofit Cloud.
- Watch a demo of the Nonprofit Cloud Fundraising module on [Salesforce+](#) or reach out to your Salesforce AE to request a demo of Nonprofit Cloud to learn more!
- Watch the [Nonprofit Keynote: Amplify Your Work and Mission with Unified Data and AI](#)

Volunteer Management

Volunteer Management is coming soon to Nonprofit Cloud! This new module will build on the relationship management strengths already on the platform to enable you to manage volunteer projects and make them visible for volunteers to sign up themselves based on their availability.

Fundraise Up

Fundraise Up believes their product is so beneficial to nonprofits that they don't sign any contracts with their clients. Nonprofits can come as go as they wish and there's no out-of-pocket cost to utilize Fundraise Up. But their retention rate is 98% annually because their product features have proven to tap into more donors, increase fund raising conversion rates and grow revenue from online giving.

Fundraising with Nonprofit Cloud

Cory Milam, CTO at The Rockefeller Foundation, stole the show in a series of foundations sharing about their fundraising using Nonprofit Cloud. Her entertaining presentation stressed the importance of change management when implementing Salesforce to realize the full value of the investment.

DREAMFORCE

Insights for Public Sector – State & Local

The overall energy and overarching message from Dreamforce 2024 for state and local agencies was one of optimism and empowerment through the adoption of AI, automation, and digital transformation. Salesforce conveyed a clear emphasis on using advanced technologies to enhance public service delivery, streamline operations, and improve citizen experiences with the goal of making government smarter, faster, and more responsive to the needs of the communities they serve.

Salesforce also reiterated its focus on trust, particularly in the context of government clients handling sensitive constituent data. They emphasized the importance of secure AI, and the data governance frameworks built into the Salesforce platform, ensuring that governments can adopt AI-powered solutions while maintaining compliance with stringent data privacy regulations.

Learn more:

- Watch the [Public Sector Keynote: How to Use AI to Improve Government](#)



Key Takeaways for Public Sector – State & Local

“Do more with less” by leveraging automation for routine inquiries and services.”

Sabastian Niles, Salesforce
Chief Legal Counsel

“Never let a crisis go to waste.”

Nancy Farais, Director CA EDD

AI-Powered Public Services with Agentforce

Salesforce introduced Agentforce, an AI-driven platform designed to streamline time-consuming processes by automating complex workflows and interactions, improving service delivery, and enhancing decision-making capabilities through data-driven insights; all of which helps governments to deliver faster and more accurate services to their constituents. Examples of where Agents can be deployed include permitting, public health responses, or citizen inquiries (311).

Data Cloud Enhancements

Data Cloud is not currently on Gov Cloud, however the new upgrades to Data Cloud provide governments with the tools to integrate disparate data sources into a unified system. With these improvements, public agencies can more easily access structured and unstructured data (like video and audio records), providing better insights into areas such as public safety, emergency response, and resource management.

Real-Time Collaboration and Interoperability with Slack and Tableau

Salesforce showcased deeper integration between Slack and Tableau, enhancing real-time data collaboration and communication across departments. This is critical for governments working across multiple agencies, enabling seamless data sharing and faster decision-making processes. With these platforms being interoperable, agencies can use one central system for reporting, collaborating, and acting on real-time insights to improve outcomes in areas like public safety, urban planning, and emergency response. Note: interoperability is not available on GovSlack.

Dreamforce Insights by Salesforce Capability



Insights for Agentforce

At Dreamforce 2024, the announcement of Agentforce marked a significant milestone in the evolution of AI platforms, showcasing a mature and robust tool designed for the next generation of customer experiences and agentic tooling.

Agentforce exemplifies the potential of autonomous business AI to revolutionize operations beyond mere prompt engineering and RAG. The palpable energy and excitement at Dreamforce underscored Salesforce's commitment to integrating AI Agents and Data Cloud, with Einstein serving as the foundational fabric of their offerings.

Flexibility and composability will be key in the AI journey, and now is the time to start laying the foundational pieces. After nearly two years of leading generative AI efforts at Slalom, we are excited to leverage our lessons learned and our strong Salesforce partnership to deliver real-world solutions that provide quantifiable value to our clients.

Learn more:

- Watch the [Agentforce Keynote: Build the Future With AI Agents](#)
- Watch the [Main Keynote with Marc Benioff: Welcome to Agentforce](#)
- [Watch Slalom's Dreamforce session: AI in Action on Salesforce](#)
- Read our blog: [Demystifying the role of agents in Salesforce and beyond](#)
- Watch Patrick Stokes, EVP, Salesforce do a [demonstration of Saks Fifth Avenue's Agentforce implementation](#) (starts at 50:30)



Key Takeaways for Agentforce



Our vision is bold: to empower one billion agents with Agentforce by the end of 2025. This is what AI is meant to be.”

Marc Benioff

Chair, CEO & Co-founder, Salesforce

Agentforce

The platform is real and has some very powerful capabilities. It’s not just a re-brand, but an evolution to a more composable orchestration of creating agents across the platform.

Atlas is a v2 Copilot planner service. Key features include a multi-step reasoning engine (einstein validating generations behind the scenes before user generation)

MuleSoft AI Chain

MAC open-source project is getting officially recognized by Salesforce, being positioned to bring multiple vector database solutions to Einstein 1 AI products.

Data Cloud + AI:

Data Cloud is a vital and pivotal piece to accomplish AI across the platform.

- Key updates like semantic retrievers let Salesforce users build powerful RAG use cases with no code.
- Hybrid search (lexical + semantic) in beta, more key features like rerankers coming.

Key Takeaways for Data Cloud

Data Cloud continues to expand throughout the Salesforce ecosystem, with focus on large announcements with AI (Agentforce). Beyond Agentforce, key features are going generally available in October, such as Data Cloud One, that were anticipated.

Agentforce

The belle of the ball – Data Cloud enables the next iteration of Salesforce capabilities with Agentforce.

Data Cloud Growth

Data Cloud saw 130% year-over-year growth in paid customers and processed more than 2 quadrillion records per quarter. Data Cloud growth continues to strengthen.

Preparing for the October Release

This is going to be a huge release, along with capabilities needed for Agentforce, Einstein Personalization and beyond, Data Cloud releases continue to be awe-inspiring in their breadth and depth.



Learn more:

- [Watch the Data Cloud Keynote: Deliver Unmatched Customer Success Through Data & AI](#)
- [Discover the path to trusted enterprise AI](#). Unlock trapped data with Data Cloud for a 360-degree view of your customers, and deploy grounded, intelligent AI for CRM with Agentforce.

DREAMFORCE

Insights for Experience Cloud

At Dreamforce 2024, Experience Cloud may have had limited content, but it delivered high-quality insights into Partner Relationship Management, Lightning Web Components (LWCs), and Data Cloud.

The sessions were focused on building dynamic experiences using Lightning Web Runtime (LWR) and leveraging new data sources, including Data Cloud and external services. Attendees gained valuable knowledge on how to harness these tools to create seamless and integrated user experiences, highlighting the potential of Experience Cloud in the evolving digital landscape.

Learn more:

- [Learn about connecting Experience Cloud to Data Cloud](#)

Experience Cloud + Data Cloud

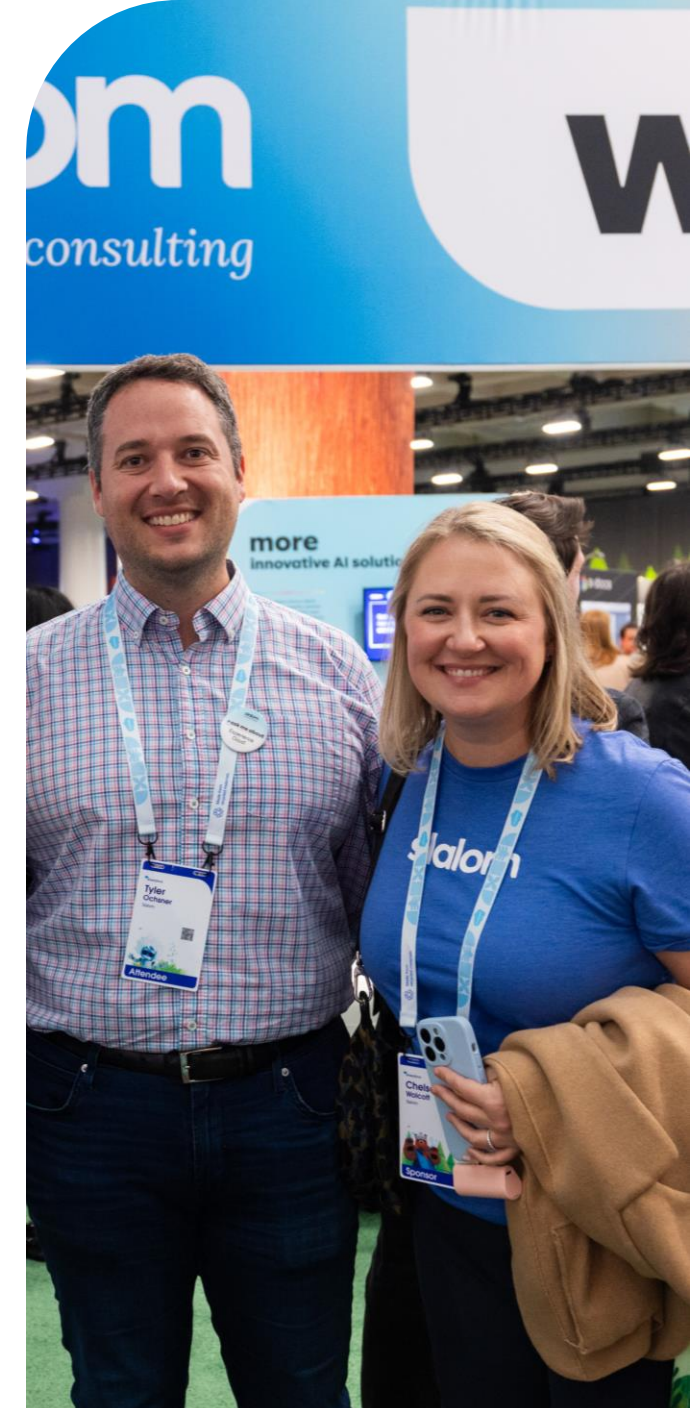
We finally have a way to use Data Cloud in digital experiences. We can now use Data Cloud for personalization while also capturing user interaction data to send the data about how a user is using the site to Data Cloud.

Lightning Web Components

Local preview is coming for LWC development, which should help accelerate LWC development.

Enhanced CMS

Enhanced CMS will finally be available to Aura sites with the Winter '25 release. CMS still has a long way to go to be a proper CMS, but this is greatly overdue progress.



Key Takeaways for Marketing Cloud

At Dreamforce 2024, one of the most talked-about announcements was the radical redesign of Marketing Cloud, now integrated seamlessly on the core CRM platform. This significant shift promises to transform the way businesses leverage marketing capabilities, offering a more unified and cohesive experience.

By bringing Marketing Cloud onto the core Salesforce infrastructure, organizations can now expect enhanced efficiency, deeper insights, and a more streamlined approach to managing customer relationships and marketing strategies.

Learn more:

- [Watch the Marketing & Commerce Keynote: How to Use Data & AI to Build Lasting Relationships](#)

AI Integration Takes Center Stage: Driving Personalization and Real-Time Marketing

There is an even stronger focus on AI integration, leveraging data to drive personalization, and real-time marketing.

Data Cloud: The Foundation of Future Enhancements for Optimized Marketing Segmentation and Targeting

Data Cloud continues to be the underpinning of Salesforce product enhancements moving forward. The new Marketing Cloud built on core can leverage data cloud to quickly act on customer signals to optimize segmentation, targeting, and personalization.

Campaign Agents Revolutionize Marketing: Autonomous Campaign Creation and Content Generation

Features like Campaign Agents (part of Agentforce) are disruptors in marketing. These agents can be used to create campaigns, build segments, and generate content autonomously, reducing manual workload for marketing and enabling them to focus on strategy.

Salesforce Elevates Marketing Intelligence: Embracing Hyper-Personalization for Brand Differentiation

Salesforce is making marketing more intelligent, and responsive – on par with broader industry trends around hyper personalization. A truly integrated Salesforce ecosystem enables brands to differentiate themselves by through relevancy and urgency.

Insights for MuleSoft

At Dreamforce 2024, MuleSoft took center stage more prominently than in previous years. Rather than being overtly highlighted, it was seamlessly integrated as the pivotal platform supporting the new Agentforce initiative.

MuleSoft was mentioned by name multiple times during the main keynote, and a dedicated team of Salesforce employees showcased Mule-based AI solutions throughout the event and in various sessions. Industry sessions specifically concentrated on leveraging Agentforce to assist with pre-sales and service situations within the HLS and FINS sectors.

Learn more:

- Watch the MuleSoft Keynote titled [“Build a Foundation for Autonomous AI”](#) which features real-life use cases for Dior and Aston Martin.

MuleSoft: The Backbone of Salesforce's AI and Agentforce Strategy

MuleSoft is considered by Salesforce to be THE tool to make AI/Agentforce a reality. This shows that MuleSoft is no longer being considered as an afterthought in the Salesforce ecosystem, but the backbone of the larger strategic plays that Salesforce is making.

MuleSoft Direct for Data Cloud Beta: Transforming Unstructured Content Integration

In addition, MuleSoft Direct for Data Cloud is going into beta, which will enable users to leverage data support for unstructured audio and video content from webinars and calls.

Slalom Leads the Way with Agentforce: Harnessing AI and Data Expertise

Slalom is uniquely positioned to lead the way with Agentforce. Our AI and DC practices are miles ahead of other SIs, and MuleSoft can and will serve the data needs for the accelerator and quick-start offerings that are ready to go to market.

Robust Integration at the Core: MuleSoft's Crucial Role in Agentforce Initiatives

At the foundation of all of these “configuration” or “low-code solutions” is some degree of robust integration behind the scenes. MuleSoft will be a large part of any Agentforce initiative.

Insights for Net Zero Cloud

AI was front and center at Dreamforce and Net Zero Cloud is certainly benefiting from the blossoming capabilities on the platform. October's release will feature significant enhancements to the ESG Reporting functionality to help automate the generation of disclosures, make suggestions for improving response quality for higher ESG scores, and capturing more information to make every year easier and easier when utilizing Net Zero Cloud for your sustainability management.

Learn more:

- **Jane Goodall, Sadhguru, and Matthew McConaughey** shared the stage for the sustainability keynote called "Leading with Purpose" which is also available on [Salesforce+](#) and definitely worth a listen.
- **Will Solutions** had a featured session now available on [Salesforce+](#) focused on the ROI to their business from implementing a cross-cloud solution. Net Zero Cloud provides the engine for their business while Experience Cloud, Sales Cloud, and Marketing Cloud are the wheels accelerating the growth of their business by all being in the same Salesforce org. You can also read about their story [here](#).
- **Oak View Group (OVG)** and a few other sustainability-as-a-service providers shared the stage for a panel on how Salesforce enables them to deliver their services effectively and efficiently in this session on [Salesforce+](#). If you aren't familiar with OVG's GOAL sustainability program, [read this article](#) to learn about their efforts to green live event venues.



Key Takeaways for Net Zero Cloud

“ If you didn’t have purpose, I don’t believe you can lead.”

Jane Goodall, World-renowned primatologist, anthropologist, author

“ Whatever I have done, a billion times more needs to be done. Otherwise, it is not a solution... Action is about solution. I did something is not the important thing. Did it lead to a solution?”

Sadhguru, Indian guru and founder of the Isha Foundation

CDP E-Submission

CDP E-Submission is finally here! The long-awaited CDP API is available, and Salesforce is one of the pilot partners to enable their customers to submit annual reports directly from Net Zero Cloud.

Salesforce Sustainability Leadership

Salesforce demonstrated their sustainability leadership by sharing details about their internal sustainability team’s use of Net Zero Cloud. Their recommendation from experience is to hire a Salesforce Admin, regardless of sustainability experience, to manage Net Zero Cloud to get the full value out of it. Paired with a sustainability SME, this “two-in-the-box” approach has paid dividends for Salesforce.

EEIO emission factor matching

EEIO emission factor matching to your procurement categories can now be updated annually in a semi-automated manner. Once you train the AI once how you prefer to map emissions factors, Salesforce machine learning can suggest the mapping to you every subsequent year even when categories change. Net Zero Cloud gives you the ability to review and edit the mapping in Scope 3 Hub, so you have complete confidence in the assignments.

Key Takeaways for Service Cloud

There was a ton of energy and focus directed to Agentforce, but under the radar flew a couple of cool and important updates in the Service Cloud space. Agentforce is going to be the underpinning of AI in all the clouds, and Service Cloud is no exception.

Agentforce for Dispatchers

This will be used to empower dispatchers to quickly address urgent issues with appointments. They also introduced Field Service Operations Home, which equips dispatchers and supervisors with an AI-powered home page experience that uses real-time data to identify patterns and critical trends, allowing users to quickly see what's important and take immediate action.

Industries AI

Salesforce released 100+ customizable out-of-the-box industry-specific prompts, data models, and AI capabilities across 15 industry clouds.

Salesforce Foundations

A free feature set that gives a flavor of how powerful AI can be in the ecosystem.

Get ready for Agentforce
Build your Customer 360 today

Salesforce Foundations
Free upgrade available for Enterprise Edition & higher

Sales <ul style="list-style-type: none">✓ Deal Management✓ Quoting✓ Meetings✓ Sales Console	Service <ul style="list-style-type: none">✓ Case Management✓ Knowledge✓ Macros✓ Service Console	Agentforce GA Oct '24 <ul style="list-style-type: none">✓ Agents✓ Agent & Prompt Builders✓ 1K conversations & 1K leads & 1 Sales Coach to get started
Marketing <ul style="list-style-type: none">✓ Email campaigns✓ Built-in analytics✓ 2K email sends (monthly)	Commerce <ul style="list-style-type: none">✓ Pay Now✓ Storefront✓ Merchandising tools	Data Cloud <ul style="list-style-type: none">✓ Unified profiles✓ Data Services & Storage✓ 10K Segmentation credits (annual)

Up for

Learn more:

- Watch the [Service Cloud Keynote: How Humans With AI Agents Deliver Service](#)
- [Hear the latest Salesforce innovations](#) and discover how service leaders create effortless service from first contact to final delivery on any channel.



DREAMFORCE

Insights for Slack

The promise of Slack as the conversational interface to Salesforce has finally come to fruition with the new capabilities that were shown at this year's Dreamforce.

While new Slack AI capabilities and Agents in Slack were heavily promoted, the most impactful new capability for broadening Slack's adoption across the Salesforce customer base is the ability to create Salesforce record channels with the click of a button and simultaneously create an embedded Slack channel panel in Salesforce (this is the first tangible feature to eventually replace Salesforce Chatter with Slack).

“ With Slack integrated into the Core Platform, you can have consistent interface for the whole company and the whole customer 360.”

Marc Benioff (DF24 Main Keynote)

Chair, CEO & Co-founder, Salesforce

Key Takeaways for Slack

Universal Search Across Systems: A Glimpse into the Future of Slack Integration

During the Slack keynote, the idea of universal search across systems was teased. This is probably tied to the various agents (Salesforce + 3rd-party) that were announced, with the eventual ability for Slack AI to query these and consolidate the results with what it can surface from within Slack.

Learn more:

- Check out this blog: [Slack Unveils Innovations for the Agentic Era at Dreamforce](#)
- Watch the [Slack Keynote: Integrate Agents that Collaborate, Automate & Assist](#)

Salesforce Record Channels in Slack: Enhanced Data Display and Messaging Integration

Salesforce record channels in Slack will include tabs for displaying Salesforce data in Slack, as well as a tab for the channel message feed. Note: this capability will require the Slack Sales Elevate add-on license.

Agentforce in Slack: Deeper Integration and 3rd-Party Agent Capabilities

Salesforce Agentforce in Slack will provide even deeper integration, improving the ability to find and surface Salesforce information in Slack. Slack also announced a set of 3rd-party agents (bots) that can be used to find and surface information from other applications in Slack.

Workday Integration: Creating Channels from Workday Records in Slack

An integration with Workday that allows channels to be created from Workday records (similar to the Salesforce records in Slack capability) was also announced.

New Slack AI Features: Huddle Notes, Workflow Automation, and Advanced Search

New Slack AI capabilities will provide additional value to the add-on offering:

- Slack Huddle Notes – synopsis of the audio conversation + comments in the huddle chat thread
- Build Slack workflows with a natural language prompt.
- Add a channel summarization output as part of a Slack workflow.
- Recap summarization for joined channels and associated huddles.
- Slack AI search will add results from Slack Canvas pages, huddle transcripts and information in uploaded files, in addition to what it currently includes from messages.

Note: timing for each of these features is TBD.

DREAMFORCE

Insights for Revenue Cloud

At Dreamforce 2024, Revenue Cloud (RC) took center stage with a dozen dedicated sessions, including those led by Slalom's own Mike Alioto, Sarah Duffy, and Amy Loftus, as well as numerous partner-led events.

The rebranding from Revenue Lifecycle Management (RLM) to Revenue Cloud has reignited interest and excitement in the platform. The sessions focused on the newly re-platformed tool, moving away from the old Steelbrick package, and showcased its functionality through demos and discussions on applicable use cases and ideal candidates.

Learn more:

- Listen to two interviews on the Novus CPQ Podcast:
 - [Interview with Brion Schweers \(SVP\) and Kevin Whitley \(VP\) from Salesforce Revenue Cloud](#)
 - [Interview with Brion Schweers, SVP Salesforce Revenue Cloud](#)



DREAMFORCE

Key Takeaways for Revenue Cloud



This is a vast improvement over Salesforce CPQ.”

Anonymous

Vice President of an existing Salesforce CPQ customer

Salesforce CPQ and Billing Near Full Feature Parity with Winter '25 Release

Revenue Cloud is nearing full feature parity with the classic CPQ and Billing managed packages! Since its release in January, Salesforce has made significant strides to reach this milestone. The Winter '25 release now includes Billing functionality and addresses CPQ-related challenges such as handling large quotes and ramped deals.

Crawl Walk Run Session Empowers Business and IT Leaders for RC Implementation

The [Crawl Walk Run: Best Practices for Deploying Revenue Cloud session](#) was excellent, as it detailed the steps to prepare for implementing Revenue Cloud. Tailored for Business and IT leaders, it provided valuable insights into what needs to be done to get ready for the significant changes that a Revenue Cloud project can bring.

Slalom's Internal RC Implementation Steals the Spotlight with Real-World Use Case

While there was considerable discussion about the overall platform, one of the standout sessions was Slalom's featured presentation on our internal implementation of Revenue Cloud. This session generated significant interest as we showcased a working proof of concept (POC) and pilot that effectively addresses a real-world use case: how to sell professional services engagements.

Key Insights for Tableau

At Dreamforce 2024, Tableau continued to revolutionize the data analytics landscape with its powerful visualization capabilities, underscored by Slalom's innovative contributions.

This year, Tableau unveiled the Pulse for Salesforce product, a cutting-edge solution designed to integrate seamlessly with Salesforce, providing actionable insights and enhanced decision-making for businesses ([click here for details on our QuickStart](#)).

Attendees also had the unique opportunity to engage with industry leaders as Slalom co-hosted the Tableau Executive Experience, a premier event that delivered deep dives into the latest advancements and strategic implementations of Tableau within the Salesforce ecosystem.

Tableau + Data Cloud

Tableau is betting big on Data Cloud and the Salesforce ecosystem, including the announcement of [‘Tableau Einstein’](#) – the next generation of Tableau.

Future of Analytics

The future of Analytics will be multi-modal, agentic experiences that include visualizations, conversational analytics, and generative data experiences that include both Visual analytics and Generative, Natural language interactions.



Learn more:

- Check out the [Tableau Keynote: How to Drive Action With AI-Powered Data & Analytics](#). “Tableau Einstein is the future of Tableau” – Ryan Aytay, CEO of Tableau at the Tableau keynote.

Key Takeaways: New Acquisitions

After a three-year hiatus following the substantial July 2021 acquisition of Slack, Salesforce is back in the acquisition game...

What does this mean for you?



Salesforce Ventures funded each of the 4 recent acquisitions, helping Salesforce develop great, focused products faster than they could internally.

Predict Spring

Merchants and retailers who need a physical point of sales model, can now turn to Salesforce to see their 1st ever hardware product. Predict Spring offers a modern Point of Sales solution, tightly integrated to Commerce and Marketing Clouds. For details, connect with retail and commerce experts Mike King and Shivani Majewski.

Tenyx

Tenyx offers a voice-based AI system and will transform automated voice customer service. Tenyx Voice was used in the Dreamforce keynote and can enhance multi-channel support. For details, connect with customer service and Voice AI experts, Amas Tenumah and Allen Mann.

Own Company (FKA Own Backup)

Own filled a need in the Salesforce platform for data backup, sandbox seeding, archiving and security. We expect Own products to be added to many customer's quotes as an up-sell solution. We will watch if a new data management competitor emerges at a lower price point. Connect with our expert Tom Gelo for details.

Zoomin

In February 24, Zoomin was included in Salesforce's launch of Unified Knowledge, 7 months later, Zoomin will now become part of Salesforce's Knowledge product to support use of Gen AI across many unstructured data sources. We'll be watching for responses from competing vendors Bynder and Coveo. Our AI and Content experts are Allen Mann and Tyler Ochsner.

slalom



Learn more
slalom.com/salesforce