



Why Companies Need AI Now, Powered by Salesforce

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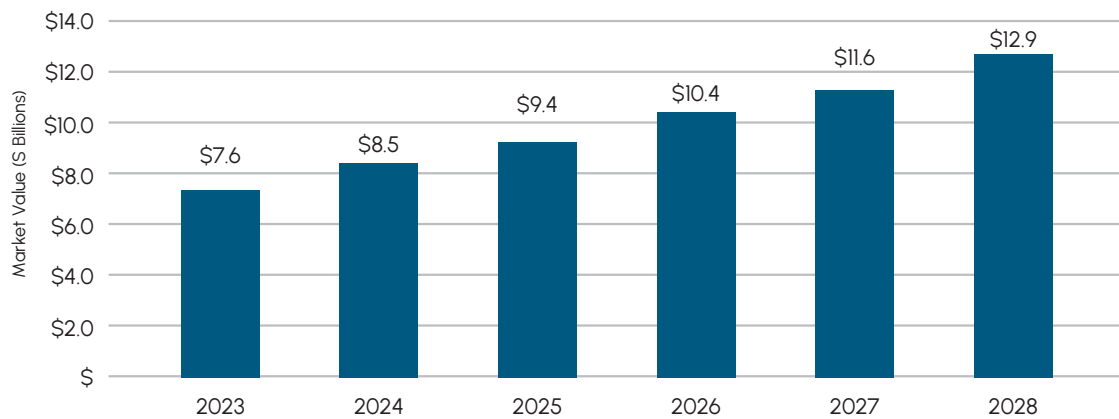
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How an Integrated Platform Approach to Deploying AI Agents Can Quickly Deliver More Efficiency and Drive CX Improvements

From its early days as a technology used for data analysis to fuel predictions and decisions to its recent use as an assistant, artificial intelligence (AI) has been a potential catalyst for enabling exponential benefits in productivity, efficiency, and overall competitiveness across B2C and B2B organizations. According to Futurum Research's 2023 Digital Transformation Index¹ conducted on more than 1,000 companies in the North America and EMEA regions, 67% of respondents said AI is projected to have a somewhat or significant impact on the company's level of competitiveness. However, 21% of respondents felt that AI would make their organizations less competitive.



Source: Futurum Research, 2023 AI Software / Tools Market Forecast

Demand for these generative AI tools and agents will drive spending on AI over the next several years. [Futurum Intelligence](#) estimates that by 2028, global spending on text analysis, generation, and summarization delivered via SaaS and other embedded platforms will reach more than \$12.9 billion annually, up from \$7.76 billion in 2023, reflecting a compound annual growth rate (CAGR) of 8.6%.

A [Capgemini June 2024 survey](#) of 1,000 senior executives and 1,000 software professionals across organizations with annual revenues exceeding \$1 billion found that although generative AI will be adopted by 85% of the "software workforce" over the next two years, 9 out of 10 enterprises are "yet to scale" with the technology.²

As such, organizations must assess the most cost-, time-, and resource-efficient path forward for accessing and leveraging generative AI, while reducing the risk of introducing security loopholes and integration complexity. For many organizations, Futurum believes that the best course of action for organizations without deep AI expertise, skills, or resources is to partner with a robust, integrated platform that offers pre-built, customizable, scalable, and commercially safe AI agents.

Futurum believes the use of pre-built, customizable AI agents that are provided through a subscription-based platform will help organizations streamline workflows and processes across myriad industries and use cases. This will drive better customer experience and will finally deliver massive leaps in productivity and efficiency at scale that have been sought by businesses.

¹ Futurum Group, Digital Transformation Index 2023, May 2023

² Capgemini, Gen AI in Software, June 2024



Streamlining Workflows and Processes Across Industries

According to a KPMG survey³ of 225 senior business leaders from companies with more than \$1 billion in revenue, efficiency improvements let workers focus on other applications. Indeed, the survey found that strategic planning and decision-making (43%), creative and innovative projects (40%), and learning and skill development (40%) were the top-cited applications in which workers were able to refocus their time because of the use of generative AI.

Based on an algorithm's capability to ingest and identify granular patterns in massive datasets, AI can drastically reduce the time and effort required to handle entire workflows. Organizations that utilize a comprehensive platform to deliver AI agents can also leverage pre-built workflows across different industries and use cases. This would reduce the amount of time and resources required to create new AI agents from scratch. Large platforms for AI delivery enable efficient workflow customization, with dedicated teams managing the process. This would reduce training, upskilling, and labor costs associated with AI development.

Platforms such as Salesforce's Agentforce offer dozens of pre-built, vetted, and tested AI use cases, accessed via a single, consistent human-centered conversational experience. AI can be quickly deployed to enhance customer interactions by incorporating demographic preferences, customer journey data, and contextual information, thereby enhancing the overall customer experience.

Complex and difficult-to-use AI systems hinder adoption and limit their value. Futurum believes that organizations must prioritize AI solutions and agents that are intuitive, easy to integrate into existing workflows, and require minimal maintenance. Futurum also believes customers can achieve their generative AI outcomes by leveraging pre-built data and AI tools & infrastructure to reduce the cost, risks, and time to value compared to building AI applications and workflows from scratch. By investing in an ecosystem that is accessible at all levels, companies can foster a culture of innovation and ensure that AI becomes a true catalyst for growth and success.

³ KPMG, GenAI Survey, August 2024

AI agents and tools can be quickly deployed to handle a wide range of use cases.

- **Financial services:** AI algorithms analyze transaction patterns and identify suspicious activities in real time to enable fraud detection within banks and other financial institutions.
- **Healthcare:** AI is used to streamline manual tasks such as appointment scheduling and claims processing.
- **Manufacturing:** AI analyzes equipment data to predict failures within manufacturing organizations. It is used to proactively schedule maintenance and inspect products for defects with high precision.
- **Retail & consumer goods:** AI is deployed as a recommendation engine in retail & consumer goods, suggesting products based on customer preferences and behavior.



Driving Better Customer Experience Through Human, Assisted, and Agentic Workflows

The use of AI has the potential to significantly improve customer experience by providing more contextual and relevant data, enhancing personalization and empathy across self-service interactions. It can also serve as an assistive tool, providing employees with critical product, service, and customer information for an efficient, frictionless interaction across various channels.

Futurum believes that AI agents – AI systems that can perform tasks without constant human intervention – will be the catalysts that drive massive increases in productivity, efficiency, and customer & employee experience. These agents can perform various tasks such as answering customer service inquiries, qualifying sales leads, optimizing marketing campaigns, and augmenting employee capabilities across sales, marketing, and customer service. Most importantly, AI agents can make decisions based on real-time data. It can take actions that are governed by company data and controls to ensure they adhere to general and company best practices.

As AI agents handle increasingly complex tasks and workflows, human workers will be free from doing routine, repetitive tasks, allowing them to focus on more challenging issues. AI agents will also assist them as well as end customers based on real-time and previous interaction data, resulting in better experience for both workers and customers.

However, significant investments in AI often precede tangible returns, making it imperative to justify expenditure through clear business outcomes and the rapid implementation of new functionality. Simply implementing AI agents without a solid framework for deployment, testing, and management will likely result in a low ROI, reputational risk, and poor customer experience.



Implementing Agentic AI Through a Trusted Platform

Companies that have released AI without proper planning and controls have wound up in the headlines for all the wrong reasons. For example, Air Canada received public backlash for its AI chatbot that provided a customer with incorrect information, resulting in the airline being forced to cough up compensation. Similarly, delivery-service DPD's chatbot that used profanity, told a joke, wrote poetry about how useless it was, and criticized the company as the "worst delivery firm in the world" after prompting by a frustrated customer, resulting in a spate of negative publicity.

As such, all AI-generated output should be grounded in the relevant business knowledge. Grounding techniques, such as retrieval augmented generation (RAG), ensure that AI models reference an authoritative knowledge base outside of its training data sources. The most effective platforms ground AI models to relevant business data and metadata – data that provides additional context to improve relevance and compliance – enabling more informed and accurate decision-making. Simultaneously, applying strong guardrails against incorrect, offensive, or otherwise undesirable outputs will prevent AI agents and bots from going off script.

The use of grounding and proper guardrails also ensures that tasks are executed according to their specific role, and lets agents engage customers autonomously across channels 24/7 using natural language. Properly grounded and guardrailed agents can make decisions to resolve cases more quickly and accurately than stand-alone copilots that each have differing data and metadata access and permissions for every user and task.

Futurum believes there are several essential elements that a platform must have to deliver superior AI and AI agent experience. The platform must operate seamlessly with existing workflows and systems, enhancing user experience and operational efficiency. It must be highly scalable, to ensure that organizations can adapt to changing demands without compromising performance.

Robust security measures are table stakes to ensure that sensitive company and customer data is always protected. An AI vendor should not train an AI model on customer data indiscriminately, as it could lead to one customer's data inadvertently benefiting another. Any sharing model utilized should ensure that only authorized data is used in each process, strictly limiting access. This is a crucial measure for maintaining data privacy and trust.

The most robust platforms also implement specific safeguards that are deployed as a separate layer to ensure any data that is sent to an LLM is forgotten after the prompt has been executed. Also mechanisms are in place to mask any sensitive data from being sent to an LLM prompt.



Using Pre-built, Customizable, Scalable, and Commercially Safe AI Agents to Quickly Deliver ROI

While the potential of AI is undeniable, there is considerable concern about the cost of enabling the technology across an entire enterprise. Building proprietary AI capabilities can be enticing for many organizations. The appeal of not being chained to monthly license fees, plus the allure of creating a unique competitive edge through controlling fully bespoke technology solutions, can create the illusion that building AI solutions from scratch will foster innovation, protect intellectual property, and reduce long-term costs.

However, building AI solutions in-house often involves substantial time and resource investments. Organizations must allocate dedicated teams, resources, and expertise to manage the security and architecture complexity of allowing AI agents to access and use data held within and outside of the organization's technology footprint. This significant upfront commitment can lead to extended development cycles. Consequently, businesses may experience delays in realizing the benefits of their AI initiatives, potentially losing competitive advantage.

Another critical challenge lies in acquiring and retaining skilled AI talent. The demand for AI professionals far exceeds the supply, making it difficult for organizations to build and sustain world-class AI teams. Relying solely on internal expertise can limit innovation and hinder the ability to adapt to evolving AI technologies. Additionally, integrating AI with external data can be complex, particularly for in-house teams that may not have dedicated experience or expertise, resulting in loopholes that can be exploited by cybercriminals.

Indeed, a September 2024 Flexential survey⁴ of 350 IT decision-makers at companies with revenues of more than \$100 million attribute the complexity of AI applications for weakening their company's cybersecurity posture by expanding the attack surface.

⁴ Flexential, 2024 State of AI Infrastructure Report, September 9, 2024



For example, Salesforce's AI tools are integrated within natural workflows and leverage a common underlying dataset via Data Cloud. This ensures that AI models used by Agents can access and use data as a single source of truth, improving the effectiveness, timeliness, relevance, and contextuality of all AI outputs.

Organizations are realizing the value of leveraging vendor technology to deploy AI rather than building it themselves, which will drive ROI and reduce time to value. The aforementioned KPMG survey also explored the build versus buy approach for GenAI solutions. It revealed that 50% of organizations are buying or leasing their GenAI from vendors, while 29% are pursuing a mix of building, buying, and partnering. Only 12% of organizations are building GenAI solutions in-house, likely reflecting a lack of confidence in the experience and expertise with the technology.

Futurum believes that many of these organizations likely want to reduce the risk of building AI applications that don't work as desired or introduce additional security risks. In fact, the Flexential survey found that about 2 in 5 IT executives said their security teams lack the skills needed to protect AI applications and workloads. Addressing these issues after a DIY project will likely require significant time and investment into third-party vendors.

Choosing a Vendor with Significant AI Expertise and Experience

Expertise and Support: Furthermore, Futurum believes that large SaaS vendors such as Salesforce can provide the expertise and resources dedicated to AI development and maintenance. This translates into a reduced burden on internal IT staff. By enabling a SaaS vendor to manage ongoing upkeep and updates, AI solutions remain secure, optimized, and effective while allowing internal IT teams to focus on core business activities and strategic initiatives.

Developer Tools: Salesforce's developer tools are also likely to provide an efficient and effective way for enterprises to further customize their generative AI environment and agents. Einstein for Flow is a tool that leverages CodeGen, a generative AI technology that was built internally, to automate building workflows within Salesforce products. Using this tool, admins with limited coding experience can create complex flows using natural language prompts, which CodeGen then translates into functional Apex code that builds the flow. This significantly reduces development time while reducing errors often associated with manual coding.

Security and Reliability: Ultimately, embracing AI shouldn't come at the expense of security and reliability. At its core, Salesforce has made AI safety a key pillar of its strategy, incorporating the Einstein Trust Layer across its entire platform. This comprehensive suite of features acts as a safety net, mitigating potential risks associated with AI implementation. The Einstein Trust Layer includes safeguards such as data masking, which anonymizes sensitive information, protects customer data, and ensures compliance with regulations. Additionally, robust audit trails record all AI activity, fostering transparency and accountability. Any problem that occurs is traceable, and the Einstein Trust Layer provides a clear process to identify the root cause and quickly fix the issues.

Data Access and Governance: Futurum has also found that Salesforce offers significant data flexibility via Data Cloud, designed to incorporate and manage a vast array of information sources into AI models, including data residing within the Salesforce platform and external sources. Pre-built integrations with popular applications and tools streamline this process, while API access unlocks data outside of Salesforce entirely. This can be particularly valuable when building AI models that require external context, such as market trends or social media sentiment.

Scale: Most importantly, the Salesforce platform can be scaled to meet growing data needs, allowing organizations to add new AI features without extensive development. Any additional required custom development is usually "last mile" in nature and, thereby, less expensive than fully custom work, which is subject to cost and time overruns. This will help organizations achieve their core goals of leveraging AI to quickly realize the promise of generative AI across the enterprise at scale, driving improvements in productivity, efficiency, and overall ROI.

Important Information About this Report

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[Salesforce](#) is the #1 AI CRM, where humans with agents drive customer success together. Through [Agentforce](#), a suite of customizable agents and tools, Salesforce brings autonomous AI agents, unified data, and Customer 360 apps together on one integrated platform to help companies connect with customers in a whole new way.

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