How will AI augment the way we work

AI Revolution
UI - Models - Data

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Forward Looking Statements

This presentation contains forward-looking statements about, among other things, trend analyses and future events, future financial performance, anticipated growth, industry prospects, environmental, social and governance goals, and the anticipated benefits of acquired co[illegible]. 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 [illegible] assumptions prove incorrect, Salesforce's results could differ materially from the results expressed or implied by these forward-looking statements. The risks and uncertainties referred to [illegible] those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: impact of, and actions we may take [illegible] to, the COVID-19 pandemic, related public health measures and resulting economic downturn and market volatility; our ability to maintain security levels and service performa[illegible]eeting the expectations of our customers, and the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate performance degradation and [illegible]ty breaches; the expenses associated with our data centers and third-party infrastructure providers; our ability to secure additional data center capacity; our reliance on third-party hardware, software and platform providers; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy, cross-border data transfers and import and export controls; [illegible] potential litigation, including [illegible] litigation involving acquired entities such as Tableau Software, Inc. and Slack Technologies, Inc., and the resolution or settle[illegible] [illegible] [illegible] [

Banking is rapidly transforming

A push to remain competitive, drive efficiency & enable customer value

Doing more with less

Driving work orchestration & process automation to optimize productivity

Hyper-personalization & E2E experience

Delivering personalization from awareness and lead generation to onboarding and service

Insights to action

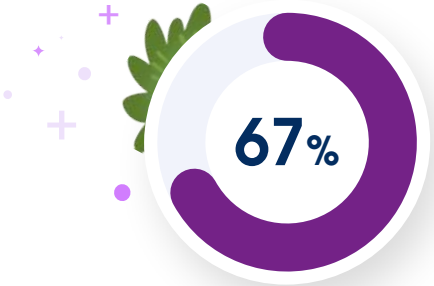
Enabling intelligence & decision optimization with connected data

Optimize & grow revenue streams

Increasing productivity across channels & deepening relationships through cross-selling

Bankers are Being Asked to Do More With Less

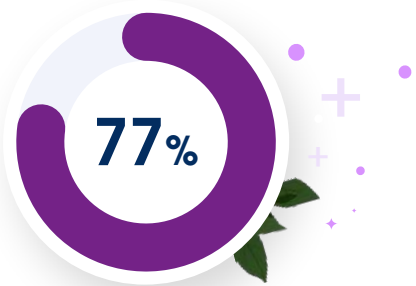
Unified Data Saves Time



of tech **resources freed up** by modern data unification solutions

Syniti Understanding the Complexity of Data Harmonization 2022

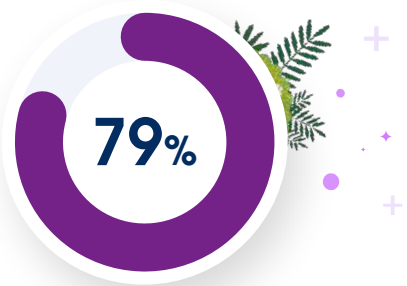
Automation Increases Productivity



of organizations **save 2 or more hours a week** through automation

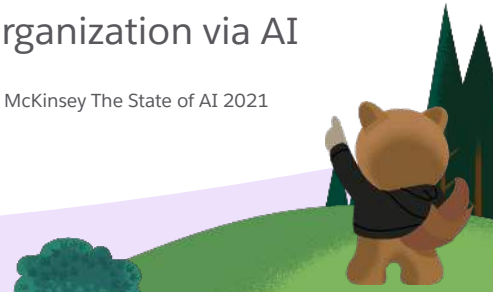
Salesforce IDC 2022

AI Reduces Costs



of companies are reporting **cost reduction** across their organization via AI

McKinsey The State of AI 2021

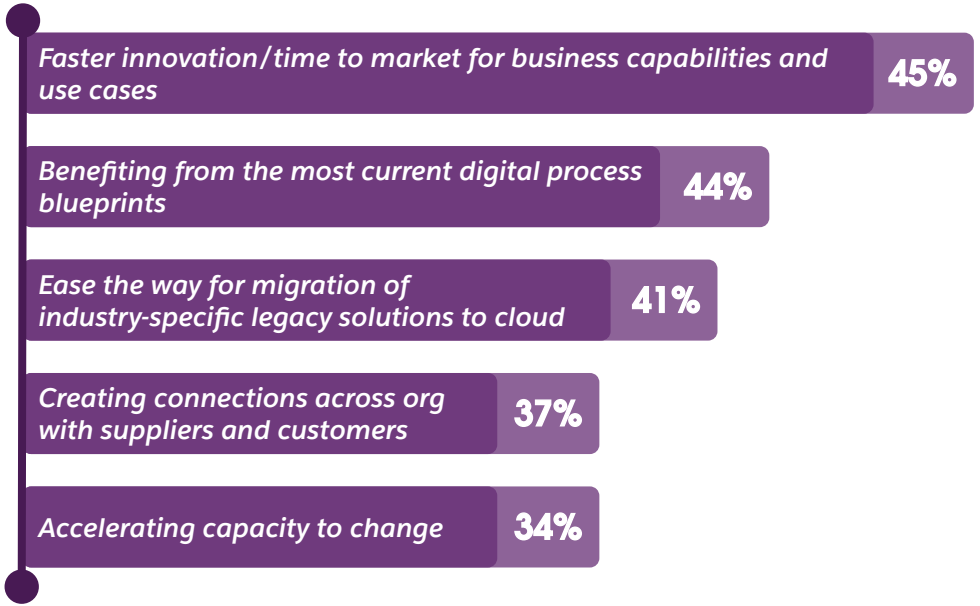


Leaders are Embracing Industry Clouds to Accelerate Transformation Efforts

92%

of Banking & Capital Markets respondents agree/strongly agree that industry clouds will be the enabler/catalyst for transformation and automation of industry-specific business processes.

Benefits of Industry Cloud as cited by Banking & Capital Markets respondents



Source: Deloitte

Salesforce has a long and successful history in Financial Services

24 years

Banks using Salesforce

8 years ago launched industry product

Financial Services Cloud (FSC) serves all sectors of the Banking industry

- Retail
- Commercial
- Lending
- Corporate & Investment
- Wealth Management

Industry Innovation

3x releases annually

24 Financial Services-specific releases

Built with Trust

ISO 27001, ISO 27017, ISO 27018

PCI DSS

GDPR

Privacy Shield - Framework for complying with EU GDPR requirements

AICPA SOC

SOC 1,2,3 Public report of Security, Availability, Integrity, Confidentiality & Privacy

CLOUD DATA PROTECTION

EU Cloud Code of Conduct

and many more...

Customer Success

Supports **1200+** Financial Services customers

TRUIST · PENFED CREDIT UNION · Huntington · RBC · EVERCORE · TD · OneUnited BANK

Partner Ecosystem

9k+ AppExchange Partners

400+ Financial Services Apps Listed

ncino · Q2 · Terafina · SKIENCE · ENVESTNET · Broadridge · SS&C

Financial Services Cloud

#1 AI CRM for Financial Services

Get business results faster with Salesforce purpose-built for Banking and Wealth

Financial Services Cloud has pioneered Customer-Centric Banking

2014
SFDC AI Research Founded

2016
Salesforce Einstein
The first predictive AI for CRM

2016
Financial Services Cloud
The first Industry CRM for Financial Services

2017
Wealth Innovation

2018
Retail Bank Innovation

2019
Commercial Innovation

2020
Mortgage Innovation

2020
Launched PPP Program

2021
Salesforce Flow for Financial Services Cloud

2021
CRM Analytics for Financial Services Cloud

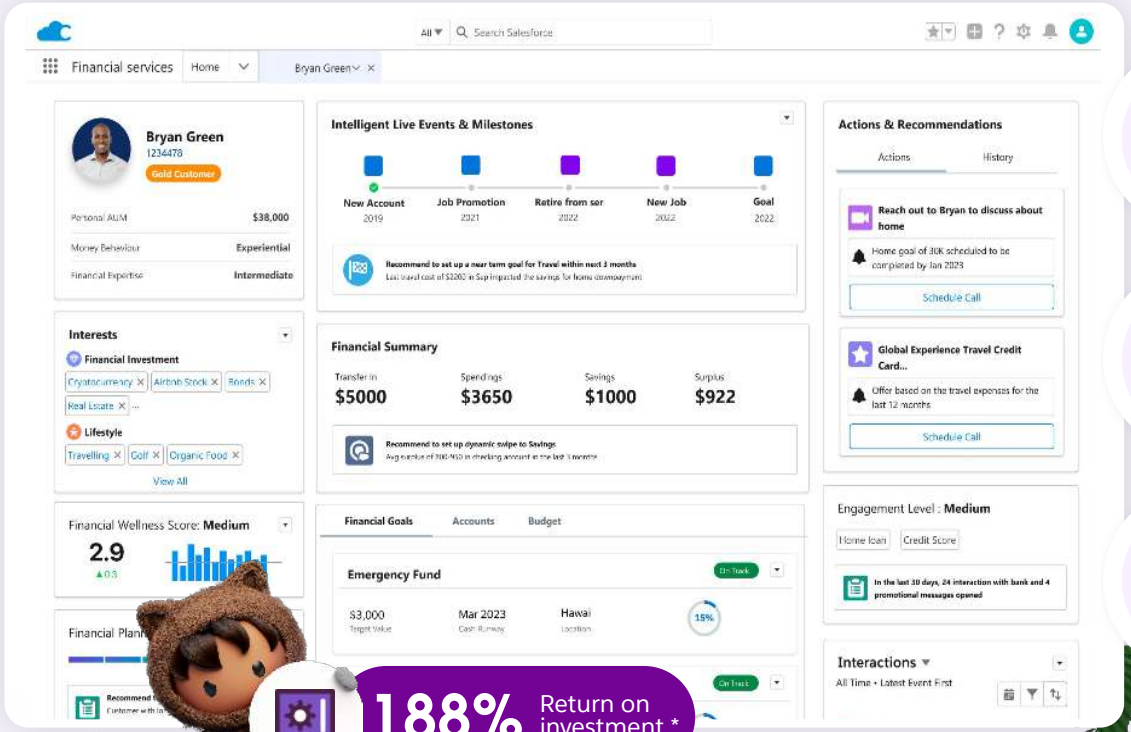
2022
Data Cloud for Financial Services

2023
Einstein GenAI
The first generative AI CRM, designed for Financial Services

2014 2015 2016 2017 2018 2019 2020 2021 2022 2023

Salesforce Financial Services Cloud

Modernize Financial Services with CRM + AI + Data + Trust



188% Return on investment *

Deepen relationships and accelerate growth with trusted AI

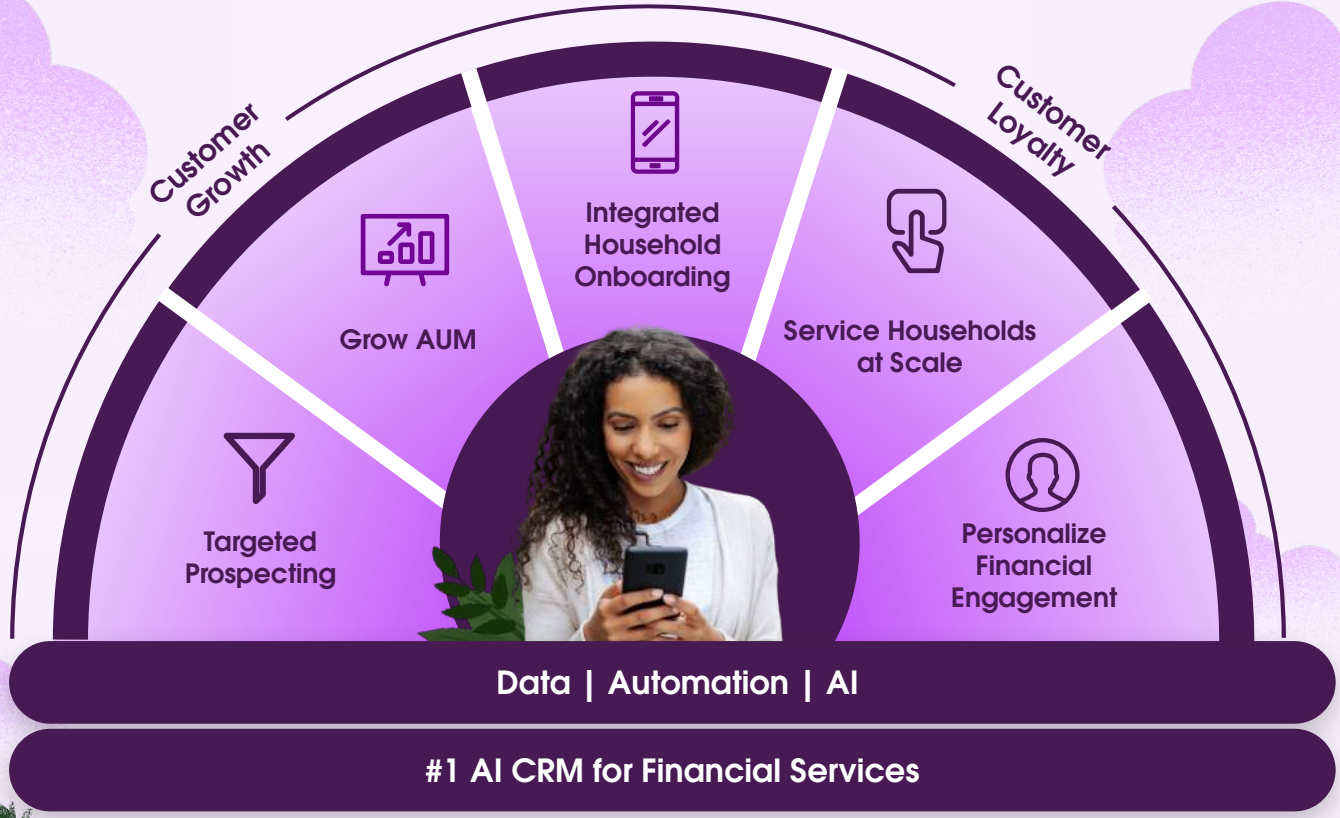
Unlock efficiency and improve loyalty with trusted service experiences

Make data a competitive advantage and bring context to every experience

* Nucleus Research ROI Case Study

Accelerate Value with Financial Services Cloud

AI powered solutions on a purpose-built trusted platform



How Einstein Copilot Works for You

Conversation

Engage Einstein with any task

Hi, I'm Einstein, your trusted AI assistant.

Can you create an email to Alex Mitchell about our new sustainability program?

Plan

Einstein generates a plan of actions

All right, I'm on it!

- Identify Record
- Draft Email
- Revise Email

Execution

Einstein invokes services

- Flows
- Prompts
- Apex
- APIs

Einstein grounds AI in your data

- CRM
- Data Cloud
- External
- User Input

Outcome

Einstein generates a response

To: Alex Mitchell (alexm@acmecorp.com)
Subject: Introducing our Sustainability Program

Hi Alex,

I trust this email finds you well as you step into your role as CEO of Acme. Heartfelt congratulations on your recent appointment! My name is Sarah Thompson, and I'm your account representative overseeing our partnership with Acme.

Our products perfectly align with your emphasis on operational efficiency and sustainability. At Acme, our ongoing sustainability program not only champions environmental responsibility but has also delivered significant operational efficiencies. I am eager to delve into how our initiatives complement your vision.

Once again, congratulations on your well-deserved appointment. I am looking forward to the opportunity of working closely with you to propel Acme to new heights.

Edit Send

Einstein Trust Layer

Generative AI, built Into the flow of work

Your Business Teams

Service

Marketing

Sales

Commerce

IT

Generative AI

Service	Marketing	Sales	Commerce	IT
Resolve inquiries more accurately	Create more resonant content	Close deals faster	Increase conversion rates	Develop faster
Service Responses	Subject Lines	Sales Emails (Page Context)	Product Descriptions	Code Completion
Knowledge Creation	Campaign Assistance	Sales Emails (CRM data + Email History)	Smart Promotions	Natural Language to Code
Work Summaries	Segment Creation		Commerce Concierge	Chat-based Coding Assistant
Search Answers	Marketing Experimentation			Code Analyzer IDE Integration

Analytics for Everyone

Tableau Pulse — GA Today

AI-Enhanced Insights — Pilot Spring '24 / GA Summer '24

Your Data and AI Models

Your AI Models, Your ML Frameworks, Your ML Platforms, Your Infrastructure

Data Platform

Harmonized Profiles | Streaming Connectors | Lakehouse | Materialized Views | Zero-ETL Sharing

Tableau Pulse - Live DEMO

Florian Banaś

Lead Solution Engineer | Tableau Analytics

Thank YOU