

## SPECIAL ISSUE ARTICLE OPEN ACCESS

# Integrating Generative AI Into Enterprise Platforms: Insights From Salesforce

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## ABSTRACT

The widespread applications of generative AI (GenAI) have sparked significant interest, with many organisations eager to leverage its transformative potential. Rather than focusing on individual organisations, this study examines GenAI integration within enterprise platforms, which are extensively adopted by many organisations and thus amplify both the benefits and risks of GenAI. We offer targeted recommendations for enterprise platform owners and their complementors, addressing challenges they face when integrating GenAI into these platforms. Drawing on a case study of Salesforce's experience, we recommend actions in three foundational areas – platform capability, architecture and governance – ensuring that our guidance is broadly applicable across enterprise platforms. In platform capability, we advise developing a unified GenAI stack built on existing platform services, offering generic and industry-specific GenAI use cases to accelerate customer adoption and providing tools for customisation and creation of new use cases to enhance GenAI's transformational impact. For platform architecture, we recommend adding new layers for accommodating diverse GenAI foundation models and creating a trusted environment for secure data access, privacy and content monitoring. We also recommend implementing a prompt architecture to improve content relevance and accuracy. In platform governance, we recommend establishing new mechanisms to mitigate GenAI risks. Partnerships with GenAI providers and proactive investments in GenAI are essential to retain critical GenAI technologies. Personalised consultancy and training along with joint design and implementation with platform customers are also recommended. These combined actions, pursued in parallel across capability, architecture and governance, form a sustainable roadmap for GenAI integration in enterprise platforms.

## 1 | Introduction

Generative AI (GenAI) marks a paradigm shift in AI, moving from discriminative (traditional, predictive) models focused on pattern recognition to generative models. Unlike discriminative AI, GenAI uses large pretrained models to 'generate' original content – text, audio, video and images – that closely resemble human-created content but at a larger scale, faster pace and lower cost. The shift from discriminative AI to GenAI has

gained prominence, driven by advancements in large language models (LLMs) like OpenAI's GPT series.

The rise of GenAI has sparked debates within practice communities on its potential use and impact. Predictions suggest GenAI could affect up to 300 million jobs, replacing 7% of US employment and complementing 63%.<sup>1</sup> By 2026, 75% of businesses may use GenAI for synthetic customer data, 60% of website and app design will be automated, 15% of new applications will be

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AI-generated and over 100 million people will work with robocolleagues.<sup>2</sup> GenAI is expected to have an even greater long-term impact, driven by significant investments from major tech companies. Despite a slowdown in venture capital, GenAI startups stand as an exception and continue to grow. The GenAI market is projected to grow from \$40 billion in 2022 to \$1.3 trillion within a decade, with key drivers being GenAI infrastructure-as-a-service (\$247 billion), digital ads (\$192 billion) and GenAI assistant software (\$89 billion).<sup>3</sup> These advancements are anticipated to increase global GDP by 7% over the same period (see footnote 1).

## 1.1 | The Double-Edged Impact of Generative AI on Organisations

In organisational contexts, GenAI offers advanced capabilities, including pretrained, task-agnostic models that can be fine-tuned for various downstream business tasks with minimal data. This opens entirely new opportunities for productivity and innovation, with the potential to impact all business processes and reshape organisations' value propositions and business models.

Given its substantial benefits for organisations, GenAI has quickly become a top priority for executives. An annual survey (Johnson et al. 2024) of 671 IT executives highlights that GenAI advancements elevated AI to a critical IT management priority. In 2022, AI ranked as the 22nd most pressing concern but climbed to 6th place in 2023. Similarly, AI moved from 15th to 8th in top IT investments from 2022 to 2023. Despite this increase, IT leaders feel AI warrants further investment.

While GenAI offers substantial benefits, it also introduces significant risks. Organisations implement fine-grained access controls to protect customer data. However, fine-tuning GenAI models with firm-specific data can compromise these efforts, as model parameters may retain training data, risking proprietary data exposure and regulatory compliance issues. Additionally, ethical risks arise when incorporating 'generated' content into business processes. These risks include hallucinated or toxic content, the transfer of biases from pretrained models to downstream business tasks, misinformation that may lead to liability claims, copyright concerns over undetectable sources of generated content and the environmental impact of energy-intensive GenAI operations.<sup>4,5,6</sup>

## 1.2 | The Amplified Impact of Generative AI When Integrated Into Enterprise Platforms

GenAI's benefits and risks stem from the unprecedented level of automation it enables. It can automate not only decision-making but also entire chains of interactions with employees, customers and other software agents. As a result, both the benefits and risks of GenAI will expand due to its broad applications across all aspects of organisations, coupled with organisations' growing interest in adopting this technology. These impacts are especially amplified in situations where not just individual organisations employ GenAI but where enterprise platforms integrate GenAI into their comprehensive

enterprise software solutions widely used within and across organisations.

Enterprise platforms are essential for technological integration in organisations, supporting data collection, sharing, decision-making and productivity enhancement. They serve as central hubs within platform ecosystems, where the platform owner (e.g., SAP, Salesforce, Oracle, Microsoft, IBM) offers the platform with its native services, complementors (enterprise app developers and consultancy firms) expand the platform's services with their add-ons and complementary solutions, and customers (organisations in various industries) derive value from the combined offerings of the platform owner and complementors (Haki, Blaschke et al. 2024; Haki, Tanriverdi et al. 2024).

Over the past decade, enterprise platforms have shifted from traditional on-premises solutions to cloud-based platforms. Salesforce led this shift in the 2000s, followed by others, such as SAP in 2012 and Oracle in 2016. Now, GenAI is set to drive the next transformation in enterprise platforms by integrating generative models into core business processes and workflows that business users use every day.<sup>7,8</sup>

Integrating GenAI into enterprise platforms enables natural language interactions with users, provides actionable insights and automates business tasks.<sup>9</sup> This has spurred significant investments and partnerships, such as a joint \$1 billion investment by SAP, Microsoft, Google Cloud and IBM in GenAI startups, Oracle's collaboration with NVIDIA to deliver GenAI services and mutual investments by SAP, Salesforce and Oracle in Cohere, a GenAI solution provider for enterprises.<sup>10,11</sup> These investments have led to initiatives like SAP's Joule, Microsoft Dynamics 365 virtual assistants and GenAI features in Oracle AI Apps. For example, SAP's Joule, a GenAI copilot, enables users to perform tasks using natural language, such as updating records, checking order statuses, approving time off and receiving personalised recommendations.<sup>12</sup>

The enterprise platform context holds significant potential for practical insights, as it amplifies both the benefits and risks associated with GenAI for organisations, particularly due to the extensive adoption of these platforms across various organisations. Moreover, platform owners are committing substantial investments towards the integration of GenAI. However, a critical issue remains: how can enterprise platform owners effectively leverage the benefits of GenAI while concurrently addressing its associated risks during integration?

To address this question, we conducted an exploratory study on Salesforce, gathering data from all ecosystem actor types, including the platform owner (Salesforce), complementors (key enterprise app developers and consultancy firms) and customers (multinational corporations). We chose Salesforce because it is a leader in the enterprise software industry, a pioneer in integrating GenAI into its platform and focuses on front-office and customer-facing processes, where the benefits and risks of GenAI are particularly pronounced.

Drawing on the Salesforce case, we recommend actions in three foundational areas – platform capability, architecture and governance – to guide the integration of GenAI into

established platforms while effectively addressing associated risks. Our target audience includes enterprise platform owners and their complementors looking for inspiration from an advanced ecosystem like Salesforce. Since enterprise platform owners and complementors across various platforms encounter similar challenges during GenAI integration, the insights derived from the Salesforce case will benefit them in facing these challenges. Additionally, we acknowledge customer firms as a side audience. Although we do not directly address their specific and immediate inquiries, our recommendations – crafted by independent authors rather than vendors – will help them comprehend the changes driven by GenAI integration.

The remainder of this paper is organised as follows: First, we introduce the Salesforce platform and outline the challenges encountered during the integration of GenAI. Next, we present three key areas of GenAI's implications for enterprise platforms, along with recommendations for addressing the inherent challenges of integrating GenAI, supported by empirical data from Salesforce. Finally, we outline the boundary conditions of our recommendations and discuss potential future challenges.

## 2 | Salesforce Platform and the Challenges of Generative AI Integration

Salesforce is a globally leading CRM platform in the enterprise software industry. The Salesforce platform consists of several Cloud and cross-Cloud components. The Cloud components are tailored to serve specific CRM functions. These include Sales Cloud, focusing on sales activities; Service Cloud for customer service automation; Experience Cloud for personalised customer experiences; Marketing Cloud for omnichannel interactions; and Commerce Cloud for e-commerce solutions.

In addition, the platform features cross-Cloud components that interconnect and deliver common services across all the Cloud components. These components include Data Cloud for comprehensive data management, Einstein for integrating AI capabilities, Industry Cloud for industry-specific customisation, Integration Cloud (including MuleSoft) for integration solutions, Analytics Cloud (including Tableau) for data visualisation and analytics and Slack for team collaboration in real time.

Data Cloud and Einstein form the foundation of the Salesforce platform's AI capabilities. Specifically, Data Cloud, with its 'zero copy' capability, enables data connections from external systems without duplication, providing the Salesforce platform with a native data lake for ingesting and harmonising data across its Cloud services. Einstein is a suite of integrated AI technologies developed for the Salesforce platform, available across all its Cloud services. By leveraging Data Cloud and Einstein components, and with the introduction of GenAI, Salesforce has begun integrating GenAI into its platform, leading to adjustments in its service offerings and technological infrastructure.

As discussed earlier, despite GenAI's benefits, it presents significant risks. Additionally, GenAI is a new technology that requires access to advanced technological resources. In its efforts

to acquire the essential technologies, harness the benefits of GenAI and mitigate its risks, Salesforce has encountered several challenges. These challenges impact all actors within the Salesforce ecosystem, including the platform owner, complementors and customers. As the platform owner, Salesforce has had to address these challenges to ensure the provision of viable and comprehensive GenAI services across the ecosystem.

For customers, the first challenge was the uncertainty in GenAI use cases and their business value. The wide range of potential GenAI use cases can be overwhelming. Identifying the most relevant use cases that deliver both immediate and long-term business value, while understanding how GenAI integrates into or reshapes current business processes and workflows, is a significant hurdle. Additionally, customers needed to move beyond generic applications, tailoring use cases to meet their industry-specific or even firm-specific needs.

The second challenge customers faced was data privacy, security and ethical issues related to GenAI. Data privacy and security issues arise as many organisations rely on third-party GenAI providers (e.g., OpenAI), which are not always transparent about using consented data. This raises the risks of exposing personally identifiable information (PII) or creating security vulnerabilities. For example, customers using fine-tuned foundation models (e.g., GPT) with their own data worry that the same data could be accessed by others using the same foundation models.

Ethical issues in GenAI models stem from inaccuracy, biases and toxicity. These models are prone to inaccuracy, sometimes generating hallucinated, false or nonsensical information – particularly when handling customers' complex or nuanced topics. Even when relevant content is generated, the complexity of GenAI models makes it difficult to trace the accuracy of outputs or ensure transparency for users within customer firms. Additionally, GenAI may amplify biases present in its training data, leading to the creation of toxic and offensive outputs, which can pose operational and reputational risks for customer firms. Therefore, adhering to ethical norms, regulatory compliance and ensuring data processing aligns with jurisdictional laws remain crucial concerns for customers intending to use GenAI.

Similar to customers, Salesforce and its complementors also faced several challenges. The first was gaining access to GenAI resources. Delivering GenAI services requires access to foundational technologies, such as LLMs (e.g., GPT). However, these technologies are typically provided by a few tech companies, and developing them in-house exceeds the expertise and capacity of Salesforce and its complementors. Therefore, Salesforce needed to secure access to these critical resources while maintaining control within its ecosystem.

The second challenge for Salesforce and its complementors was promoting GenAI adoption by customer firms. Even when secure, reliable and comprehensive GenAI services were offered, customers remained hesitant to adopt this rapidly evolving technology. Customer firms expressed concerns about trust, security and the overall maturity of GenAI, fearing that these solutions might quickly become obsolete or be replaced by more advanced technologies. A shortage of experienced professionals further

hindered the development and implementation of GenAI strategies within customer firms. Additionally, many customer firms had already purchased business licences from companies like OpenAI to use LLMs, driven by their initial interest in exploring GenAI applications. As a result, they were reluctant to pay Salesforce and its complementors for access to the same models, especially since they were already building their own GenAI capabilities around business applications – with Salesforce being one of the many they used.

### 3 | Integration Implications of Generative AI for Enterprise Platforms

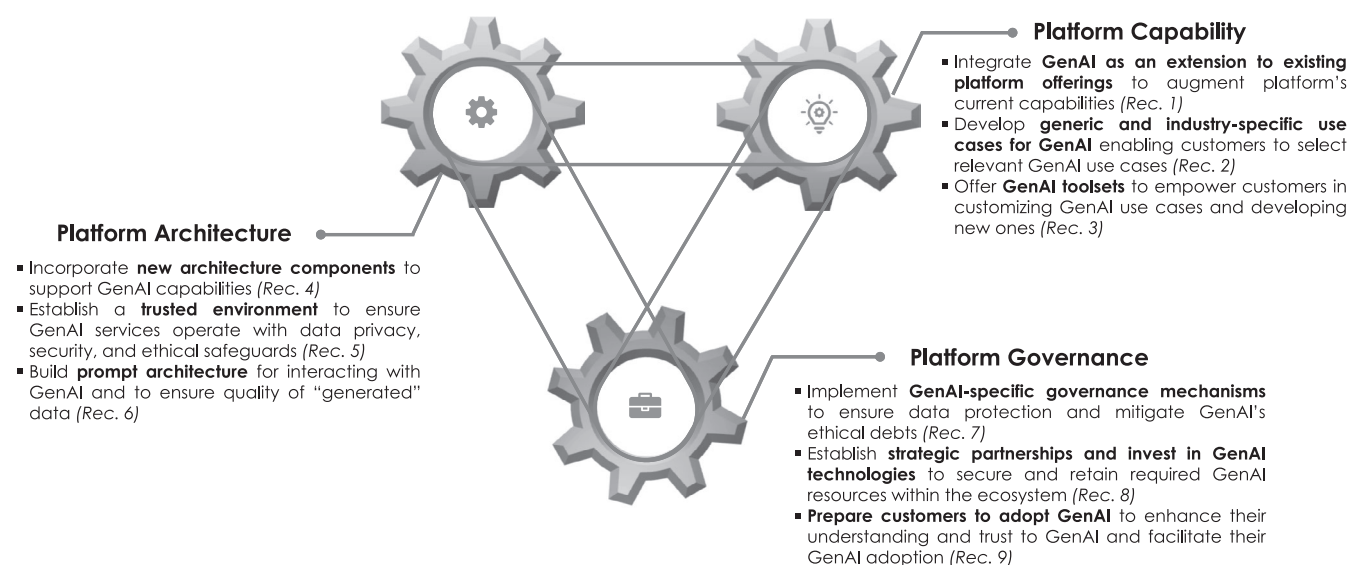
Considering the challenges of integrating GenAI into enterprise platforms, this technology has significant implications for various aspects of these platforms. We categorised these implications into three distinct areas of managing the technological shift in enterprise platforms: platform capability, platform architecture and platform governance. For each area, we offer recommendations to help platform owners and their complementors integrate GenAI into their already established enterprise platforms (Figure 1), aiming to address the discussed challenges.

Regarding platform capability, each established enterprise platform offers various services that customers can use to create business value. To address the uncertainty in GenAI use cases and their business value challenge, platform owners should integrate GenAI into their existing services, enhancing them with new capabilities to deliver greater tangible value to customers (recommendation 1). Additionally, platform owners should offer a set of predefined generic and industry-specific use cases for GenAI, allowing customers to select those that best meet their business needs and adopt them immediately (recommendation 2). Customers should have the flexibility to adopt these use cases in their native format, customise them or even configure new use cases to meet their unique needs. Therefore, the next recommendation is to provide GenAI toolsets for customers who wish to customise existing use cases or develop new ones independently (recommendation 3).

Offering GenAI-enabled capabilities in response to the uncertainty in GenAI use cases and their business value challenge requires adjustments to the platform architecture to support these new capabilities. Platform owners are advised to incorporate new architectural components to access native or fine-tuned foundation models necessary for GenAI-enabled capabilities and to enable these models to provide cross-platform GenAI services (recommendation 4). Further implications for platform architecture are expected when addressing the data privacy, security and ethical issues challenge. Platform owners should add a trusted environment on the platform to ensure GenAI services operate with data privacy, security and ethical safeguards (recommendation 5). Additionally, to improve the overall effectiveness of GenAI and control the quality of ‘generated’ data, platform owners should develop a well-structured prompt architecture (recommendation 6).

Further addressing the data privacy, security and ethical issues challenge requires specific initiatives for platform governance. Platform owners are advised to establish GenAI-specific governance mechanisms to regulate customer data access and usage (e.g., data retention policies, anonymisation and encryption of data used in GenAI prompts) and mitigate GenAI’s ethical debts (recommendation 7). Other implications for platform governance are expected when addressing the access to GenAI resources and GenAI adoption by customer firms challenges. To access complementary and often scarce GenAI technologies, platform owners should pursue strategic partnerships with GenAI model providers and actively invest in cutting-edge GenAI technologies through, for instance, startups and acquisitions (recommendation 8). Lastly, platform owners should invest in customer education and personalised consulting and implementation services, offering tailored packages to enhance understanding and facilitate the adoption of GenAI technologies by customer firms (recommendation 9).

While each area holds its unique implications, a cross-area relationship also exists, given the multifaceted nature of GenAI integration challenges. For instance, the data privacy, security and ethical issues challenge requires both establishing a trusted



**FIGURE 1** | Three foundational areas of generative AI implications for enterprise platforms with associated recommendations.

environment on the platform and implementing a prompt architecture (recommendations 5 and 6 in platform architecture). Simultaneously, it requires creating new mechanisms to regulate customer data access and mitigate ethical risks (recommendation 7 in platform governance). Therefore, platform owners and their complementors need to coordinate efforts across various aspects of their platforms and the surrounding ecosystems to ensure the effective integration of GenAI and address the associated challenges.

In the following section, we detail recommendations for platform capability, architecture and governance, with empirical support from Salesforce's GenAI integration. Table 1 maps each challenge of GenAI integration to the corresponding recommendations for addressing it. It also outlines the issues encountered when deploying these recommendations, practical actions for deploying the recommendations and empirical data from the Salesforce case.

## 4 | Recommendations for Integrating Generative AI Into Enterprise Platforms

### 4.1 | Platform Capability

#### 4.1.1 | Recommendation 1: Integrate Generative AI as an Extension to Existing Platform Offerings

To make the business value of GenAI tangible and immediate for customers, enterprise platform owners should prioritise enhancing the value of their already existing services with GenAI features. Since customers are already deriving value from these services, integrating GenAI will make its business benefits more apparent and impactful. Therefore, platform owners should develop a unified GenAI stack on top of existing platform services, encapsulating GenAI within the current framework rather than building a separate technology stack. This unified stack should be integrated with a cross-platform data management component (e.g., a data lake) to embed GenAI features across all platform services.

Salesforce developed Agentforce, a unified GenAI stack. Agentforce includes 'assistive' GenAI functions ('help me do a job'), a conversational AI assistant for facilitating natural language queries from users, and 'agentic' GenAI functions ('complete a job for me') that take actions on behalf of users. As a result, Agentforce includes a broad range of GenAI assistants and autonomous agents. Salesforce embedded Agentforce across nearly every existing Salesforce Cloud, including Sales Cloud, Service Cloud, Marketing Cloud and Commerce Cloud, alongside cross-Cloud services like Tableau and Slack to expand their capabilities with GenAI. To enable within-Cloud and cross-Cloud GenAI features, Agentforce is integrated with Data Cloud that harmonises data across all Salesforce platform services.

Within the Sales Cloud, GenAI is utilised to draft personalised communications (e.g., emails) with customers, automate the identification and linking of prospective accounts and summarise conversational data (e.g., meetings, voice, video calls) to extract actions. For the Service Cloud, GenAI supports service

agents by generating multilingual answers to customer questions from specific data sources and generating customised responses based on ongoing chat conversations with customers. In the Marketing Cloud, the technology is employed to create captivating subject lines for marketing emails and provide content for personalised emails, Web advertising and marketing campaigns. Commerce Cloud is augmented by GenAI to generate product descriptions based on provided instructions and references, as well as to create customer-specific purchase recommendations through chatbots. Additionally, the integration of GenAI with Tableau allows for generating conversational insights and visualisations from natural language questions posed by users. As a senior director at Salesforce highlighted, 'the ability of these LLMs is [...] to create new ways of looking at data and information which go beyond what an individual human is generally able to do, in terms of the access to the vast data stores that sit underneath these models and the ability to construct generally speaking, comprehensive and clear pieces of text to help explain or describe or organise information in a very useful way.'

Lastly, within Slack, GenAI enhances communication flows by creating automated responses that are contextually relevant and natural-sounding, as well as generating and summarising content such as sales reports and knowledge articles. The co-founder and CEO of a complementor firm underscored how GenAI helps maintain conversational fluidity: 'What happens when somebody says something that is out of context? So, you didn't anticipate it and how are you going to deal with that? [...] You didn't want to break the conversational flow and GenAI is great with keeping the flow going even when somebody goes out of bounds.'

#### 4.1.2 | Recommendation 2: Develop Generic and Industry-Specific Use Cases for Generative AI

Augmenting the capabilities of current platform services with GenAI makes its business value more evident. However, customers may find it challenging to identify relevant GenAI use cases for their specific needs and to integrate GenAI effectively into their business processes. To address this, platform owners should provide predefined, ready-to-use GenAI use cases that enable customers to select and adopt relevant ones quickly. These use cases should include both generic applications, applicable across various industries and industry-specific applications tailored to meet the unique requirements of each industry vertical. This approach not only simplifies the integration process but also enhances the overall user experience by providing targeted solutions that drive immediate business value.

In the case of generic use cases, GenAI helps provide comprehensive data on customers, along with sales recommendations. This functionality optimises performance and outcomes across various areas. The CEO of a complementor firm provided call centres as an example of GenAI's generic use cases, emphasising how GenAI streamlines the work of call centre agents by offering relevant insights and recommendations based on customer history: 'Let's suppose that you are a call centre agent, and you need to solve a problem. You have a portal called Service Cloud within Salesforce [...]. (A customer) just called to return a pair of shoes [...]. (You) can bring up

**TABLE 1** | Challenges in integrating generative AI into enterprise platforms with associated recommendations and actions.

| GenAI challenges                                          | Recommendations                                                                             | Issues in deploying the recommendations                                                                                                                                                                                                                        | Actions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Examples from Salesforce                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-----------------------------------------------------------|---------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Uncertainty in GenAI's use cases and their business value | Integrate GenAI as an extension to existing platform offerings (recommendation 1)           | <ul style="list-style-type: none"> <li>Augmenting platform services with GenAI features to offer greater value and improve user experience on existing platform services</li> </ul>                                                                            | <ul style="list-style-type: none"> <li>Encapsulating GenAI into existing platform services instead of building a separate technology stack</li> <li>Developing a unified GenAI technology that integrates assistive and agentic GenAI functions across the platform, utilising a cross-platform data architecture to embed GenAI features within all platform services</li> </ul>                                                                                                                                                                        | <ul style="list-style-type: none"> <li>Agentforce as a unified technology stack across Salesforce platform's Cloud services linked directly to Data Cloud to support cross-Cloud services</li> <li>Integration of Agentforce into key Salesforce Cloud services, including Sales Cloud, Service Cloud, Marketing Cloud, Commerce Cloud, Tableau, and Slack to support both assistive and agentic GenAI features</li> </ul>                                                                                                                                                                                                                                                                   |
|                                                           | Develop generic and industry-specific use cases for GenAI (recommendation 2)                | <ul style="list-style-type: none"> <li>Offering predefined, ready-to-use GenAI use cases that customers can select and adopt immediately</li> </ul>                                                                                                            | <ul style="list-style-type: none"> <li>Developing generic, transversal GenAI use cases applicable across multiple industries</li> <li>Developing industry-specific GenAI use cases tailored to each industry vertical</li> </ul>                                                                                                                                                                                                                                                                                                                         | <ul style="list-style-type: none"> <li>Predefined use cases for each of Salesforce's Cloud services and industry sectors</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|                                                           | Offer GenAI toolsets to customise existing use cases or develop new ones (recommendation 3) | <ul style="list-style-type: none"> <li>Providing customers with flexibility to customise predefined use cases and create new ones tailored to their unique needs</li> </ul>                                                                                    | <ul style="list-style-type: none"> <li>Offering toolsets for easy and safe customisation (e.g., through low-code tools and natural language) or for building new GenAI use cases to fit specific needs</li> </ul>                                                                                                                                                                                                                                                                                                                                        | <ul style="list-style-type: none"> <li>Agent Studio toolsets including Agent Builder, Prompt Builder, Skills Builder and Model Builder</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|                                                           | Incorporate new architecture components to support GenAI capabilities (recommendation 4)    | <ul style="list-style-type: none"> <li>Adjusting the platform architecture to integrate GenAI components and to enable new GenAI features</li> <li>Providing customers with flexibility to use a variety of GenAI foundation models on the platform</li> </ul> | <ul style="list-style-type: none"> <li>Incorporating new architectural components to provide the foundation models required for GenAI-enabled capabilities</li> <li>Fine-tuning key foundation models (or developing internal foundation models) to align GenAI outputs with customer data and terminology</li> <li>Integrating the fine-tuned (or internal) models into a cross-platform data architecture to enable cross-platform GenAI services</li> <li>Providing secure connections between the platform and external foundation models</li> </ul> | <ul style="list-style-type: none"> <li>Inclusion of the Model Ecosystem as a new architectural component to provide a variety of foundation models supporting GenAI services</li> <li>Provision of Salesforce's native foundation model and a fine-tuned version of OpenAI's model, and their integration with Data Cloud supporting GenAI capabilities across Salesforce Cloud services</li> <li>Establishment of the Model Ecosystem as an open and extensible architectural component, allowing customers use Salesforce's native model, partner models (e.g., OpenAI, Meta, Amazon, Google) or any other models</li> <li>Secure access to external foundation models via APIs</li> </ul> |

(Continues)

TABLE 1 | (Continued)

| GenAI challenges                          | Recommendations                                                                                                                                                                            | Issues in deploying the recommendations                                                                                                                                                                                                                                                                                           | Actions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Examples from salesforce                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data privacy, security and ethical issues | Establish a trusted environment to ensure GenAI services operate with data privacy, security and ethical safeguards (recommendation 5)<br><br>Build prompt architecture (recommendation 6) | <ul style="list-style-type: none"><li>• Creating a trusted environment to ensure the safe flow of customer data and control over generated content, especially when using external GenAI models</li><li>• Managing prompts to enhance the quality of generated content and ensure the utility and robustness of prompts</li></ul> | <ul style="list-style-type: none"><li>• Adding an architecture component that manages data access, masks data before sending to GenAI models, checks the output for toxicity, filters biased or inappropriate content and ensures zero data retention</li><li>• Providing context to prompts through integration with a cross-platform data architecture</li><li>• Including predefined prompt templates for common GenAI use cases<ul style="list-style-type: none"><li>• Offering a user-friendly, low-code interface for customising prompt templates and creating tailored prompts across platform services</li></ul></li></ul>                                                                                                                    | <ul style="list-style-type: none"><li>• Trust layer within the platform architecture, integrated with Agentforce and Agent Studio, to oversee the entire process of data use and content generation</li><li>• LLM Gateway to review the generated content for toxicity and biases before delivering it to the user</li><li>• Integration of prompt engineering with Data Cloud and other relevant data sources, allowing Agentforce to operate with complete context and precision, reducing the risk of hallucinations<ul style="list-style-type: none"><li>• Predefined prompts to guide users on which actions to run or what clarifying questions to ask</li></ul></li><li>• Prompt architecture framework including prompt testing and validation, performance monitoring and feedback loops to enhance prompt effectiveness</li><li>• Role-based permissions and access control mechanisms, data retention policies, data anonymisation or pseudonymisation mechanisms and audit trails</li><li>• Control mechanisms with external GenAI models so they only access data during the specific query, after which the data is promptly removed from their reach</li><li>• Including disclosure mechanisms in Agentforce and integrating smaller, domain-specific models (e.g., xLAM and xGen-Sales) within the Model Ecosystem</li></ul> |
| Access to GenAI resources                 | Establish strategic partnerships and invest in GenAI technologies (recommendation 8)                                                                                                       | <ul style="list-style-type: none"><li>• Ensuring access to a variety of external GenAI models and resources to deliver comprehensive GenAI services on the platform</li></ul>                                                                                                                                                     | <ul style="list-style-type: none"><li>• Establishing governance mechanisms for data privacy and security, complementing GenAI-related architecture components</li><li>• Setting up service provision agreements with external GenAI model providers (e.g., OpenAI)</li><li>• Implementing governance mechanisms to ensure transparency in AI-generated content and promote the use of smaller, low-carbon foundation models</li><li>• Forming strategic partnerships with leading GenAI model providers to blend the platform's proprietary technology with offerings from key market players</li><li>• Acquiring complementors and investing in startups in the GenAI field to integrate their technologies into existing platform services</li></ul> | <ul style="list-style-type: none"><li>• Partnerships with key GenAI players, such as OpenAI, Google and Amazon</li><li>• Acquisition of Airkit.ai to develop Agentforce, and Tenyx to enhance Agentforce with voice agents</li><li>• Investments in numerous GenAI startups (e.g., Anthropic, Mistral, Runway)</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

(Continues)

TABLE 1 | (Continued)

| GenAI challenges                 | Recommendations                                     | Issues in deploying the recommendations                                                                                                                                                                                        | Actions                                                                                                                                                                                                                                                                            | Examples from salesforce                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----------------------------------|-----------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| GenAI adoption by customer firms | Prepare customers to adopt GenAI (recommendation 9) | <ul style="list-style-type: none"> <li>Customers' hesitation to adopt GenAI solutions due to concerns about its business value</li> <li>Customers' lack of knowledge of GenAI's conceptual and practical frameworks</li> </ul> | <ul style="list-style-type: none"> <li>Offering personalised consulting, design and implementation services to help customers engage with and derive business value from GenAI based on their unique needs</li> <li>Offering tailored educational packages to customers</li> </ul> | <ul style="list-style-type: none"> <li>Consulting or advisory services designed to consult and educate customers about potential use cases of GenAI</li> <li>Design and implementation services to deliver GenAI proof-of-technology, proof-of-concept or quick-win build and deployment, jointly with customer firms' AI and business teams</li> <li>Targeted training and awareness programmes focused on data privacy and security</li> </ul> |

(customer's) record and see all the history. GenAI can also come in and make some recommendations: [... The customer] has a certain type of preferences based on all the patterns that they find in the database.'

Due to the varying perceptions of Salesforce's offerings across industries, industry-specific use cases have also emerged to assist experts in different domains. For example, in healthcare, GenAI supports personalised patient engagement, generates tailored health reminders and enables dynamic appointment scheduling.

Furthermore, to bolster platform capabilities, Salesforce offers customers the flexibility to adopt predefined generic and industry-specific use cases in their native format, customise them to suit their specific requirements or even create new use cases tailored to their unique needs. A partner from a complementor firm outlined these three ways in which GenAI use cases can be adopted, emphasising the offered flexibility: 'There's one category of use cases which is native to platforms already today. [...] We can help customers adopt that and help them get the most value out of them, but there's no programming, there's no development work. [...] Then, there's the second one, which is using already available use cases, in terms of technology. So, it's kind of configuring and expanding a good one for [their requirements...], a chatbot for instance. [...] Then the last one is more transformational. Where you take a workflow and completely redesign it with GenAI. [...] The third one is completely reinventing.'

In the Salesforce ecosystem, the impact and application of GenAI use cases have evolved significantly over time. Initially, the primary objective of GenAI use cases was to tackle specific tasks, often with a focus on achieving short-term goals and enhancing operational efficiency. Such 'tactical' GenAI use cases involve using GenAI to improve existing operations without fundamentally altering the underlying processes. Examples include utilising GenAI for generating personalised email responses or creating varied digital advertisements for different audience segments.

In contrast, 'transformational' GenAI use cases represent a shift toward employing GenAI in ways that fundamentally disrupt existing processes or significantly change the delivery of value. An associate director in a complementor firm described transformational use cases as follows: 'Imagine that after 6 months of using GenAI, a company realises that, (its) salespeople are starting to act differently. They don't do what they've been doing for the last 10years. [...] They are interacting with customers in different ways. So, then you realise that your process is old because of the way GenAI can be used [...]. Those will be transformational changes, that impact your current processes and not technology only.' The current focus of GenAI use cases leans more toward this transformative approach.

#### 4.1.3 | Recommendation 3: Offer Generative AI Toolsets to Customise Existing Use Cases or Develop New Ones

In addition to enhancing the platform's existing services with GenAI and providing predefined generic and industry-specific

use cases, it is essential to equip customers with the necessary tools to configure their own use cases and leverage ‘transformational’ ones. This capability empowers customers to customise predefined use cases and develop new ones tailored to their specific needs. To facilitate the independent exploration of GenAI use cases, these tools should provide user-friendly interfaces that allow for easy customisation and creation of use cases. For instance, incorporating low-code and natural language functionalities can simplify the development process, making it accessible to users without extensive technical expertise.

To achieve this, Salesforce has introduced GenAI toolsets known as Agent Studio. These tools empower customers to design and implement their own GenAI use cases while retaining control over their utilisation within the Salesforce ecosystem. As the associate director of a complementor firm emphasised, the true value lies not just in having GenAI itself, but in the ability to configure and tailor its use cases through Agent Studio: ‘It’s not about the car, it’s about the machine that builds the car. So, the same thing; it’s not about having GenAI [...]. The thing is having the (Agent) Studio that allows you to configure [...]. So, the Studio will be the machine that gives you the difference.’ This approach also allows Salesforce to acquire new capabilities and add new use cases without the need for extensive in-house development.

While tactical use cases of GenAI, such as the email generator, are valuable, they may not be considered groundbreaking on their own. However, the potential for transformational use cases arises when GenAI is leveraged to empower customers’ developers in creating new use cases. A partner in a complementor firm highlighted this shift, emphasising that while most current use cases remain tactical, Agent Studio has the potential to drive transformation: ‘So far, everything has been tactical. [...] They do ticket summaries, [...], and personalised sales emails. [...] I’m not seeing something that’s super revolutionary and which has completely transformed the platform. I think the one thing maybe could do that potentially is [...Agent] Studio. [...] The developers of your customers can use that to program certain new processes with GenAI and I can then use that as an input and build that as a capability native to my platform for all my other customers. I think that could transform what I offer because it could be a way for Salesforce to acquire new capabilities that don’t have to build themselves.’

Salesforce Agent Studio consists of Agent Builder, Prompt Builder, Skills Builder and Model Builder. Agent Builder is a low-code builder that allows customers to customise existing agents (offered on Agentforce, see recommendation 1) or build new ones across various Cloud services. Prompt Builder streamlines the generation, testing and deployment of GenAI prompts, providing a user-friendly interface and low-code experience for creating tailored prompts across various Cloud services. For instance, it can be used to create personalised prompts for sales representatives. A managing director in a complementor firm highlighted Prompt Builder’s significance in extending Salesforce’s built-in capabilities: ‘Salesforce is bringing to market what they call a Prompt Builder which allows you to take the standard capabilities they build out of the box, and also engineer additional prompts that bring in more data but also your ability to create your own set of prompts.’

Skills Builder allows customer firms to create customised AI actions to efficiently gather relevant insights and discussion points. For instance, Skills Builder can be used to establish a ‘competitor analysis’ skill to assist with meeting preparation by analysing market data, sales figures and interacting with external databases to generate a thorough competitor analysis. In turn, Model Builder allows customer firms to select GenAI models from Salesforce or partner companies, enabling the training or refining of models. It uses a bring your own model (BYOM) approach to make it compatible with various AI platforms such as Amazon Bedrock, Databricks, Google Cloud’s Vertex AI and OpenAI.

## 4.2 | Platform Architecture

### 4.2.1 | Recommendation 4: Incorporate New Architecture Components to Support Generative AI Capabilities

Augmenting platform capability, as outlined in the first three recommendations, requires adjustments to platform architecture to integrate GenAI components and enable new GenAI-powered features. Additionally, customers should have the flexibility to select and use various GenAI foundation models on the platform, allowing them to leverage transformational use cases. To achieve this, platform owners should incorporate an architectural layer that supports a diverse set of foundation models necessary for GenAI capabilities.

At its core, this new layer should enable secure connections between the platform and external foundation models provided by other vendors. Platform owners can further enhance this layer by incorporating their own foundation models or fine-tuned versions of key existing models (e.g., OpenAI’s GPT) to better align GenAI outputs with customer-specific data and terminology. When pursuing these enhancements, platform owners should integrate both fine-tuned and internal models into a cross-platform data architecture to deliver GenAI capabilities consistently across platform services.

To support GenAI tasks across various Cloud services, Salesforce has introduced a new architecture layer called the Model Ecosystem, providing the essential infrastructure for GenAI-enabled capabilities. This architecture layer offers customers flexibility in GenAI model usage: they can choose from Salesforce’s provided models or bring their own (using a BYOM approach, see recommendation 3).

Salesforce’s provided models include its proprietary models as well as a fine-tuned version of OpenAI’s GPT, customised with Salesforce data (formerly known as Einstein GPT). These models are seamlessly integrated into the platform through connection with Data Cloud to support GenAI capabilities across all Salesforce Cloud services. This structured environment allows for the integration of GenAI features within various Salesforce Cloud services, such as Sales Cloud, Service Cloud and Marketing Cloud and handles the processing of vast data volumes from diverse sources necessary for GenAI tasks. In addition, Salesforce has partnered with major GenAI model providers, including OpenAI, Google and Amazon, making it

possible for customers to integrate models such as OpenAI's ChatGPT, Google's Vertex AI and Amazon's SageMaker with their Salesforce data.

The Model Ecosystem layer is also designed to be open and extensible, enabling customers to bring and integrate their own GenAI models alongside those provided by Salesforce. As a director of conversation design at Salesforce emphasised, Salesforce provides customers with the freedom to choose among different LLMs: '(Customers) can use any large language models. Salesforce has its own LLM for code generation. (Customers are) welcome to use that if (they) want. Also, if (customers) would rather use OpenAI, they literally just click a button and select openAI instead. [...] If (customers) have (their) own large language model, they just switch to this piece.' This flexibility empowers customers to tailor GenAI solutions to their unique needs, ensuring that the platform adapts to a wide array of business use cases and requirements.

#### 4.2.2 | Recommendation 5: Establish a Trusted Environment to Ensure Generative AI Services Operate With Data Privacy, Security and Ethical Safeguards

A major concern for customers using GenAI models, especially those provided by third-party tech vendors, is data privacy, security and ethical integrity. These challenges include risks of data breaches or misuse, as customer data often leaves the platform for processing. Additionally, there is significant concern about the ethical implications of incorporating AI-generated data into business processes that may be hallucinated, false, inaccurate or biased.

Enterprise platform owners often depend on external vendors for GenAI models, as developing these models in-house may exceed their technical resources. However, platform owners are responsible for ensuring that GenAI services operate with robust data privacy, security and ethical safeguards when handling platform data. By establishing a trusted environment, platform owners can secure their position in the GenAI value chain way beyond GenAI model providers, ensuring the safe flow of customer data and maintaining control over generated content.

To achieve this, platform owners should add architectural components that manage data access, anonymise data before sending it to GenAI models, monitor output for toxicity, filter out biased or inappropriate content and ensure zero data retention. This approach addresses customer concerns and helps create a secure, ethical framework for GenAI-powered operations.

In the Salesforce ecosystem, Agentforce (see recommendation 1) and Agent Studio (see recommendation 3) are equipped with a so-called Trust layer. This architecture layer incorporates privacy, security and ethical measures as emphasised by a business strategy director at Salesforce: '(Salesforce is) using several different engines now to combine them, the best engines together and the Trust layer, will never share sensitive data with these engines. Now, (it) will mask our sensitive data before sending (it) to the prompt.'

The Trust layer incorporates a collection of safety guardrails and toxicity detection mechanisms into Agentforce, providing a strong set of safeguards that ensure customer data privacy and security while flagging harmful content before it reaches users. It also enhances the prompt instructions in Agent Studio, particularly within Prompt Builder, by setting boundaries on the scope of AI agent responses. For instance, it directs the foundation models to avoid using sensitive variables such as gender, age, race, sexual orientation and socioeconomic status.

For this purpose, the Trust layer first processes data based on real-time context, respecting user-defined permissions. It detects PII (a data security measure) and steers model output toward desirable outcomes and avoids hallucinations in case the model does not know the answer based on the given context. Then, data masking techniques create structurally similar but inauthentic copies of the actual data, with detected entities replaced by placeholders. Prompts are checked for biases and discriminatory content, and sentiment analysis is performed on responses.

Subsequently, there is a so-called LLM Gateway in which data is processed using either Salesforce's proprietary models or partner models, like OpenAI's, within a shared trust environment. All processed data will be forgotten afterward, ensuring zero retention. Generated responses undergo toxicity detection to filter out biased or inappropriate content. Finally, there is the prompt demasking stage, where PII is reintroduced into the generated content. A director of conversation design at Salesforce highlighted how Salesforce ensures security and ethical integrity in this process: '(Salesforce) never uses ChatGPT directly for security reasons, but it has a Gateway where it implements essentially several layers of security and trust to be able to make sure that the data are used in a safe and private trust-driven way. So, (Salesforce) does have an internal environment where customers use ChatGPT, it comes through Salesforce. So, customers log into their Salesforce and use it there and the Salesforce team actually helped develop the library of prompts and the system prompt that essentially to make sure that (Salesforce) includes things like ethics and social scope as part of the backend.'

#### 4.2.3 | Recommendation 6: Build Prompt Architecture

Prompts, the instructions given to generative models, are central to ethical considerations in GenAI as they directly influence the content generated. The framing and management of prompts can lead to outputs that raise concerns about accuracy, bias, privacy and harm. Therefore, alongside establishing a trusted environment (see recommendation 5), addressing data privacy, security and ethical issues requires a robust prompt architecture to enhance content quality and ensure prompt utility and reliability.

Platform owners should build a prompt architecture that provides context to prompts by integrating with a cross-platform data architecture and other relevant datasets, reducing the risk of hallucinations and enhancing the accuracy of outputs. Additionally, platform owners should offer predefined prompt

templates for common GenAI use cases (see recommendation 2) to help guide user interactions with GenAI models. A user-friendly interface for customising these templates and creating tailored prompts across various platform services would further enhance control and adaptability in GenAI interactions.

In the Salesforce ecosystem, alongside the Trust layer, Salesforce has built a prompt architecture, which is a framework designed to manage the operation, creation, management and optimisation of prompts used with GenAI. A key feature of the prompt architecture is ‘dynamic grounding’, which enhances prompts with contextual data. Specifically, prompt engineering is integrated with data sources, allowing real-time contextualisation using data from Salesforce Data Cloud and other relevant sources. Data Cloud provides ‘zero-copy’ access to unified, real-time customer data, enabling Agentforce (see recommendation 1) to operate with full context and accuracy, thereby minimising the risk of hallucinations. By integrating prompt engineering with Data Cloud, Agentforce ensures that generated content is grounded in verifiable data sources, allowing users to trace and validate the accuracy of the outputs. Additionally, Agentforce leverages Retrieval-Augmented Generation (RAG) to incorporate other structured (e.g., CRM records) and unstructured (e.g., emails, meeting notes, PDF files) data directly into prompts from Data Cloud. This enriches the prompts with additional contextual data, leading to the generation of more accurate and relevant outputs.

Besides providing context to prompts, Salesforce offers user-friendly tools including templates, forms or graphical interfaces that guide users in formulating prompts. Users can leverage these tools to define the context, content and objectives of their prompts. Salesforce’s prompt architecture includes predefined prompt templates for common use cases. These templates serve as starting points for prompt creation, streamlining the process and ensuring consistency in prompts across scenarios. Users can customise these templates as needed to generate more accurate and relevant outputs.

Before deploying prompts, Salesforce provides testing and validation mechanisms. Users can test their prompts within a controlled environment to assess the quality of responses generated by GenAI. This iterative approach allows for prompt refinement and optimisation. Furthermore, Salesforce’s architecture includes monitoring and analytics capabilities to track the performance of prompts. Customer firms can gather insights into how prompts are utilised, the effectiveness of GenAI responses and areas for improvement. Finally, Salesforce incorporates a feedback loop into its prompt architecture, where users can provide feedback on the effectiveness of prompts and GenAI responses. This feedback can inform ongoing improvements and refinements to the prompt engineering process. An associate director in a customer firm emphasised how this approach enables users, regardless of deep technical expertise, to leverage GenAI effectively: ‘Now, things would be faster and possible to be done by somebody who’s not fully skilled up, but who can probably write the right prompts and get the right answer. As an example, a developer (that) may not be the best developer in the town, but as long as they can write the right prompts, get the right code, [...] they get a good code already implemented.’

## 4.3 | Platform Governance

### 4.3.1 | Recommendation 7: Implement Generative AI-Specific Governance Mechanisms

To further address data privacy, security and ethical issues, platform owners should implement governance mechanisms tailored to GenAI risks, alongside establishing a trusted environment and prompt architecture (see recommendations 5 and 6). These mechanisms – including policies, practices and controls – regulate data access and usage while mitigating GenAI’s ethical debts. Additionally, service provision agreements with external GenAI providers (e.g., OpenAI) should ensure robust data privacy and security standards.

To address data privacy and security issues, Salesforce has implemented certain mechanisms to complement their Trust layer and prompt architecture. As part of the Trust layer, Salesforce ensures that external systems only gain access to the data during the specific query, after which it is promptly removed from their reach. As a business strategy director at Salesforce highlighted, ‘Salesforce has an agreement with (different LLM) engines to never save the query from Salesforce and if the answers come back from these (engines), we will filter the toxic answers.’

As part of the prompt architecture, Salesforce incorporates role-based permissions and access control mechanisms. Customer firms can define who has the authority to create, modify or utilise prompts in their organisations. This helps maintain data security and ensures that only authorised personnel can interact with GenAI. In addition, Salesforce defines data retention policies that specify how long customer data used in GenAI interactions is retained. This helps Salesforce customers comply with data privacy regulations. Salesforce also puts in place data anonymisation or pseudonymisation mechanisms before the data is used in prompts to reduce the risk of exposing PII (a data security measure) in GenAI interactions. Such mechanisms ensure that only essential data is used in prompts and unnecessary data is avoided to reduce the potential risk associated with handling sensitive data. Finally, Salesforce maintains audit trails that track interactions with GenAI features. These logs record when prompts are created, modified or accessed, providing transparency and accountability. Additionally, by aggregating user feedback (e.g., thumbs down) and tracking how often users edit content before use, audit trails monitor errors and provide insights into prompt performance.

To address ethical issues, Salesforce has implemented several mechanisms within its Agentforce (see recommendation 1) and Model Ecosystem (see recommendation 4). Agentforce includes disclosure mechanisms that require agents, such as those in Sales Cloud and Service Cloud, to clearly state when content is AI-generated, ensuring transparency (e.g., a disclaimer in chatbot responses or watermarks on AI-generated images). In the Model Ecosystem, Salesforce promotes the use and development of appropriately sized models (e.g., xLAM and xGen-Sales, its proprietary models), recognising that smaller, domain-specific models can often outperform larger, general-purpose ones (e.g., GPT) and reduce carbon footprints. Therefore, using efficient

hardware and low-carbon data centres helps mitigate GenAI's environmental impact.

#### 4.3.2 | Recommendation 8: Establish Strategic Partnerships and Invest in Generative AI Technologies

Enterprise platforms are expected to deliver a diverse range of GenAI services to customers, which requires access to various GenAI resources and technologies, such as foundation models. However, even resource-rich platforms may lack certain technologies or the capacity to develop them. Given the complexity and rapidly evolving field of GenAI, merely relying on proprietary developments requires a significant investment of time, capital and human resources with delayed outcomes. To address this, platform owners should form strategic partnerships with leading GenAI technology providers, combining their proprietary technologies with solutions from key GenAI market players. These partnerships are crucial in the evolving technology landscape of enterprise platforms, enabling platform owners to expand capabilities, enhance offerings and foster a more dynamic, competitive market.

In addition to strategic partnerships, platform owners must secure and retain essential GenAI resources and technologies to maintain control within their ecosystems. This approach ensures access to critical resources and technologies needed to deliver GenAI-enabled services sustainably. To achieve this, platform owners should actively invest in GenAI startups or acquire GenAI complementors, integrating their resources directly into the platform's services.

Notably, Salesforce has forged strategic collaborations with GenAI leaders such as OpenAI, Google and Amazon that have enabled customers to integrate LLMs, such as ChatGPT and Vertex AI, with Salesforce data. As discussed in the platform architecture (see Model Ecosystem in recommendation 4), integrating GenAI into Salesforce's services requires incorporating a range of foundation models offered by external vendors. Through these partnerships, Salesforce aims to combine its proprietary technology with that of key market players, ensuring essential architectural components are available on its platform and providing customers with comprehensive GenAI solutions.

Furthermore, Salesforce has actively engaged in acquiring thriving startups and complementors in the GenAI field. For example, in 2022, Salesforce acquired Troops.ai, a bot-based service that integrates with Slack, allowing sales teams to manage and update data across Salesforce Cloud services more efficiently by facilitating these operations directly within Slack. In 2023, Salesforce acquired Airkit.ai, a GPT-4-based platform that enables complementors and customers to develop specialised customer service chatbots. This acquisition provided essential technology for developing Agentforce (see recommendation 1) within Salesforce. Agentforce has since been enhanced with additional acquisitions, such as Tenyx, which equipped Agentforce with voice agent capabilities.

In addition to these acquisitions, Salesforce launched a \$250 million GenAI fund aimed at strengthening the startup

ecosystem and advancing GenAI technology. Through this initiative, Salesforce has invested in startups like Anthropic, Mistral and Runway, ensuring access to cutting-edge GenAI developments to support a wide range of evolving GenAI use cases.

#### 4.3.3 | Recommendation 9: Prepare Customers to Adopt Generative AI

The acceptance and adoption of GenAI by customers are critical factors in the success or failure of GenAI initiatives for platform owners. As a nascent technology, GenAI faces hesitancy among customer firms due to concerns over its business value, reliability, security and overall maturity. Additionally, the conceptual and practical frameworks of GenAI are not widely understood by the broader user base, partly due to a shortage of experienced professionals. To address these challenges, platform owners should offer personalised consulting, design and implementation services to help customers engage with GenAI and realise its business value based on their specific needs. They should also provide tailored educational packages to inform customers about GenAI advances and emerging use cases.

To enhance customer understanding and engagement with GenAI technologies, Salesforce has adopted a strategy that includes providing design and implementation services to deliver GenAI proofs of technology, proofs of concept and quick-win deployments in collaboration with customer firms' AI and business teams. Salesforce also offers various consulting and advisory services to clarify GenAI use cases tailored to specific business needs, focusing on tangible outcomes such as tactical and transformational applications of GenAI (see recommendations 2 and 3), rather than merely highlighting its technological capabilities.

In addition, to address the major concern of customers about data privacy and security, Salesforce has instituted targeted training and awareness programmes. These programmes are dedicated to informing customer firms on best practices for data privacy and security in the context of GenAI. Through these educational initiatives, Salesforce aims to not only ease customer fears but also strengthen the foundational trust necessary for the successful adoption and utilisation of GenAI. As an associate director in a customer firm noted, 'there are now videos and sessions and training (offered by Salesforce), which happen on how to write good prompts. So, that is probably more important than in which language or with which tool you're doing it. Probably that's now more important that you know how to write the right prompt, which will give you the right answer.'

## 5 | Discussion and Conclusion

The ever-growing use and diverse applications of GenAI have created a bandwagon effect, prompting many organisations to adopt this technology. Our study is based on the premise that examining GenAI's implications within enterprise platforms, rather than within individual organisations, offers valuable practical insights. Because these platforms are widely used by organisations, integrating GenAI into them can not only amplify its benefits but also heighten associated risks.

Therefore, we provide a set of recommendations for integrating GenAI into enterprise platforms, addressing the challenges faced by participants in a platform ecosystem. We do not directly address the challenges faced by organisations using enterprise platforms (i.e., customer firms). Instead, our recommendations are directed at platform owners and their complementors, who have established platforms and encounter similar challenges when integrating GenAI into their platforms.

Our recommendations draw from insights gained through the Salesforce case, a pioneering example of GenAI integration within an established enterprise platform. While Salesforce provided direct empirical evidence, we structured our recommendations around three foundational areas – platform capability, architecture and governance. Focusing on these universal areas makes the recommendations broadly applicable across various enterprise platforms, regardless of their specific characteristics or the current state of GenAI integration. To ensure effective GenAI integration, recommendations in these three areas should be pursued in parallel, as they complement and reinforce each other. Each recommendation also includes specific actions that can be approached step by step for manageable progress and alignment across all areas.

In platform capability, we recommend that platform owners and their complementors begin by developing a unified GenAI stack atop existing platform services. This includes encapsulating GenAI within current platform services to make its business value tangible and immediate for customers. Next, platform owners can offer predefined, ready-to-use GenAI use cases – both generic and industry-specific – enabling customers to quickly select and adopt those most relevant to their needs. After customers have identified and leveraged basic GenAI use cases, they should be equipped with tools for configuring new use cases tailored to their specific business needs. Therefore, the following action is to provide a set of tools that allow customers to customise existing use cases or create new ones for transformative applications.

In parallel with these capability-focused actions, platform architecture adjustments are necessary to support GenAI integration. This begins with adding a new architectural layer that accommodates a diverse set of foundation models essential for GenAI capabilities. This layer should allow customers flexibility in using the platform's native or fine-tuned models, as well as models of their own choosing. An even more critical architectural action is establishing a trusted environment layer to manage data access, ensure anonymity, monitor GenAI outputs for issues like toxicity and bias and enforce zero data retention. Additionally, a prompt architecture with certain prompt engineering procedures should be implemented to help users generate high-quality, relevant content and reduce the risk of hallucinations. This includes adding context to prompts, providing predefined prompt templates and guiding users in prompt creation.

In parallel with actions in augmenting platform capabilities and adjusting the platform architecture, complementary actions in platform governance are recommended. This should start with new governance mechanisms to mitigate GenAI's inherent risks, ensuring platform data remains protected and secure, providing transparency on AI-generated content and promoting

low-carbon foundation models. Further governance actions include forming strategic partnerships with leading GenAI model providers and investing in or acquiring GenAI startups and complementors to secure and retain essential GenAI technologies within the ecosystem. To enhance customer engagement and understanding of GenAI, these governance efforts should be rounded out with personalised consulting and training services, as well as collaborative design and implementation services, to help customers maximise GenAI's value.

## 5.1 | Recommendation Caveats

While we outlined actions in universal areas of enterprise platforms – platform capability, architecture and governance – to ensure they are broadly applicable across platforms and stages of GenAI integration, we also recognise several boundary conditions relevant to our recommendations.

First, as with any single-case study, our focus on Salesforce entails single-case biases. Analysing additional enterprise platform ecosystems could provide further insights, enriching or refining our recommendations. Second, since platform owners like Salesforce have recently embarked on integrating GenAI into their platforms, continual investigation into GenAI's implications will likely reveal new actions in platform capability, architecture and governance areas.

Third, our outreach to enterprise platform users (i.e., customer firms) was relatively limited compared to other ecosystem actors, as these firms are still in the early stages of GenAI adoption. Consequently, our recommendations primarily target platform owners and complementors, who are currently more directly involved in GenAI integration. Engaging more extensively with customer firms will be essential to gain a comprehensive understanding of their perspectives and expectations. Addressing their unique needs may require a distinct set of recommendations, as they face specific challenges such as the consistency of GenAI services across different platform vendors and the integration of GenAI into legacy systems. Finally, our recommendations were formulated within the context of enterprise platforms specifically. They may require adaptation when applied to other types of digital platforms.

## 5.2 | Future Challenges and Opportunities

In this work, we discussed major challenges posed by GenAI and provided recommendations for addressing them. However, integrating GenAI into enterprise platforms may soon introduce additional challenges that platform owners and complementors will need to tackle. These challenges could also create new opportunities for all actors within the enterprise platform ecosystem.

Traditionally, enterprise platform owners controlled their ecosystems by owning the platform and defining governance mechanisms to guide its evolution. However, as previously outlined, offering comprehensive GenAI services requires platform owners to secure access to critical GenAI resources, typically provided by third-party vendors. The cost and resource-intensive

nature of developing and maintaining GenAI resources like LLMs means that only a few companies can realistically sustain them, potentially leading to a lock-in trap. This would increase the dependency of platform owners on external vendors to deliver reliable services to their customers. Therefore, a key challenge on the horizon is how platform owners can avoid falling into the lock-in trap and how to maintain control of the platform when the provision of platform services increasingly relies on third-party vendors. Moreover, using multiple platforms increases architectural complexity, prompting platform owners to streamline services and avoid duplicate capabilities like DataBricks and Salesforce Data Cloud.

The dependency of enterprise platform owners on external vendors can potentially create new opportunities. Enterprise platform owners can integrate into the ecosystems of external vendors, creating synergies between the two. For instance, AWS now allows Salesforce to sell licences on the AWS marketplace, making Salesforce part of the AWS ecosystem. Customer firms can use their AWS credits to purchase non-AWS licences, such as Salesforce. A similar approach could be applied with GenAI model vendors, capitalising on the interdependencies between different platforms.

As another challenge, due to their reliance on third-party vendors, enterprise platform owners are required to pay for access to these external resources. Most GenAI vendors charge on a consumption-based model (pay-per-use), while enterprise platform owners traditionally use a subscription-based pricing model for their customers. This misalignment could soon create a significant challenge for platform owners and complementors, as they will need to align their pricing structures with those of GenAI vendors, potentially shifting to a consumption-based approach. Adopting a consumption-based model could disrupt the financial predictability that platform owners and complementors currently enjoy.

This challenge may have a double-edged impact on customer firms. Customers, who are accustomed to fixed subscription fees, may struggle to predict and budget for their required services, as costs would fluctuate based on usage. However, the consumption-based model could benefit customers by eliminating the need to pay for unused licences. Many customer firms are already looking to renegotiate their licences due to underutilisation, which can be a costly and time-consuming process for enterprise platform owners and complementors as well. Adopting a consumption-based model could help reduce these frictions. Overall, transitioning to a consumption-based model could increase flexibility and scalability, but it risks compromising financial predictability for platform owners and complementors, while also potentially alienating customers who prefer the simplicity and stability of fixed pricing. Customers will need to strengthen their skills in data volume forecasting, budgeting and continuous cost and usage management. This will help them adapt to the new pricing models and avoid either overpaying or under-provisioning their employees with the necessary services.

### Conflicts of Interest

The authors declare no conflicts of interest.

### Data Availability Statement

The study is based on interviews with experts. The data supporting the findings of this study cannot be shared or made publicly available due to confidentiality agreements with the interview participants. Specifically, the data consist of anonymised qualitative interviews, and participants were assured that their identities and statements would remain confidential. To protect their privacy, we are unable to share the data.

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## Appendix A

### Research Method

Investigating the implications of GenAI integration requires a deep understanding of enterprise platforms in their real-world contexts. To this end, we adopted a single case-study research design (Eisenhardt 1989) selecting Salesforce as a thriving enterprise platform and a pioneer in GenAI integration. Our study employed an exploratory approach, involving the concurrent collection and analysis of data through an iterative process.

### Data Collection

We collected primary data through semi-structured interviews from June to December 2023. To triangulate data from various perspectives, we collected data from all actors in Salesforce's ecosystem, including

the platform owner (Salesforce), complementor firms (key players) and customer firms (multinational corporations).

We crafted interview questions based on our knowledge on the Salesforce platform (Staub et al. 2021a, 2021b) and input from two practitioner members of the study with extensive experience at Salesforce. We developed a set of common questions alongside specific sets of questions for each ecosystem actor type, including platform owner, complementor firms and customer firms. The interview questions included motivation and current uses of GenAI (e.g., business and technological reasons), business use cases, success stories, incorporation of the technology), effects and challenges of using GenAI (e.g., business and technological effects, adoption, risks and challenges), and prospective uses and effects of GenAI. We ensured that interview questions were sent out in advance, allowing enough time for interviewees to reflect on the questions.

The study's two practitioner members assisted in selecting interviewees based on expertise and involvement in GenAI initiatives at Salesforce, complementors and customer firms. Each interview was conducted online (on Teams) by two researchers and all interviews were recorded with consent and transcribed verbatim. The transcriptions were then reviewed and corrected to eliminate errors.

In total, we conducted 25 interviews with an average duration of 60 min, resulting in 392 pages of interview transcriptions. Among these interviews, seven were with the platform owner, sixteen with complementors, and two with customers. Table A1 provides a summary of the interviewees' profiles.

Each interviewee contributed specific aspects of GenAI integration based on their role in the Salesforce ecosystem and their respective organisations. Collectively, these contributions provided a comprehensive understanding of GenAI integration and its implications in enterprise platforms. Therefore, the inclusion of multiple quotes from some interviewees in this paper, while not quoting others, merely reflects the particular relevance of their statements. The interviewees who were not

**TABLE A1** | Overview of interviewees.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Salesforce–Position/Country/Experience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <ul style="list-style-type: none"> <li>Senior Vice President/Germany/+30 y</li> <li>Senior Director/United Kingdom/33 y</li> <li>Director of Conversation Design/US/8.5 y</li> <li>Vice President of Product Management/US/22 y</li> <li>Business Strategy Director/Germany/20 y</li> <li>Success Architect/Germany/25 y</li> <li>Business Architect/France/37 y</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Complementor firms–Position/Country/Experience/Organisation's number of employees/Organisation's based country/Domain                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <ul style="list-style-type: none"> <li>Board Member/US/28 y/51–200 employees/US-based/Software development</li> <li>Senior Global Sales Director/US/34 y/+13k employees/US-based/Consultancy</li> <li>Engineering Director/Finland/20 y/+700 employees/US-based/Software development</li> <li>Chief Technology Officer/UK/19 y/+700k employees/Ireland-based/Consultancy</li> <li>Senior Vice President of Innovation/Spain/16 y/+2200 employees/Canada-based/IT services</li> <li>Senior Director/USA/15 y/~4k employees/US-based/Software development</li> <li>Senior Developer/Canada/9 y/~4k employees/Canada-based/Global service</li> <li>Managing Director/US/26 y/+700k employees/Ireland-based/Consultancy</li> <li>CEO/China/25 y/+2200 employees/Canada-based/IT services</li> <li>Co-founder and CEO/US/30 y/14 employees/US-based/Technology, information and internet</li> <li>Managing Director and Partner/US/14 y/~30k employees/US-based/Consultancy</li> <li>Principal Data Scientist/Germany/10 y/~30k employees/US-based/Consultancy</li> <li>Associate Director/Germany/25 y/~30k employees/US-based/Consultancy</li> <li>Partner/Spain/13 y/~30k employees/US-based/Consultancy</li> <li>Project Leader/US/5 y/~30k employees/US-based/Consultancy</li> <li>Managing Director and Partner/US/12 y/~30k employees/US-based/Consultancy</li> </ul> |
| Customer firms–Position/Country/Experience/Organisation's number of employees/Organisation's based country/Domain                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <ul style="list-style-type: none"> <li>Associate Director/Germany/25 y/+65k employees/UK-based/Chemical manufacturing</li> <li>Head of Digital Solutions/Switzerland/14 y/~65k employees/UK-based/Chemical manufacturing</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

quoted, although not directly cited, provided complementary insights that were essential in shaping the overall understanding of GenAI integration.

In addition to primary data, we gathered supplementary secondary data to enhance our understanding of the case. This included publicly available documents, such as service descriptions, news articles, announcements in Salesforce events (e.g., Dreamforce), and recorded talks or presentations. We also incorporated non-confidential documents provided by interviewees and practitioner members of our study. By triangulating these sources with our primary data, we aimed to ensure a richer and more nuanced perspective on the case.

## Data Analysis

This study iteratively combined sampling, data collection and analysis (Strauss and Corbin 1998). We began the research with a set of initial questions and approached relevant informants to collect data. Using an iterative process between data collection and analysis, we analysed the initial collected data to uncover emerging themes and determine subsequent data collection needs. To ensure methodological rigour in this process, two researchers met immediately after each interview session to discuss key findings, capture preliminary insights and record memos. In addition, every four to five interviews, the two researchers held review meetings to evaluate data saturation for specific themes, identify gaps in understanding and decide which themes required further exploration and data collection. Furthermore, biweekly meetings with two practitioner members of the study were conducted to review insights, assess the need for new data and identify experts for subsequent interviews. These periodic assessments enabled the iterative refinement of the process. They also guided revisions to interview questions, informed decisions on engaging new informants and facilitated targeted outreach to relevant individuals.

We analysed the collected data using ATLAS.ti software. The analysis began with open coding, where we systematically coded the transcripts line by line to identify initial categories and subcategories. As the analysis progressed, some categories were merged or refined, resulting in 40 distinct categories of codes related to the implications of GenAI integration and nine categories for the challenges associated with it. Notably, line-by-line coding was applied exclusively to primary data. Secondary data served as a supplementary source, particularly for categories where interview data was insufficient, such as details about specific GenAI functionalities and their connection to platform services.

Next, we conducted axial coding to reorganise and analyse the data at a higher level, identifying relationships among the emerging categories and subcategories. This phase resulted in eight categories related to the implications of GenAI integration, offering a higher level of abstraction, along with three general categories of GenAI integration challenges. In the final stage, selective coding, we synthesised the categories from the previous step by examining their similarities, differences and interrelations. This process led to the identification of three distinct overarching categories of GenAI integration implications: platform capability, architecture and governance, each with their respective subcategories. Additionally, we mapped the GenAI integration challenges to these categories and subcategories, enabling us to pinpoint specific actions to address each challenge. This comprehensive analytical process allowed us to systematically explore and understand the multifaceted implications of GenAI integration for the Salesforce platform.