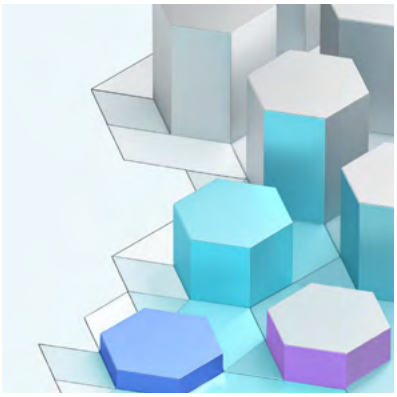
The State of Salesforce 2025–26

3 pillars for cost-effective agentic AI at scale

For many Salesforce customers, the AI revolution is delivering more invoices than insights, and the mounting pressure to deliver ROI on AI extends to their use of Salesforce's low-code AI agent builders. Unlocking business outcomes takes more than turning on features. Organizations must reimagine how AI, platforms, and people come together to serve the customer—and turn AI from a cost center into a financial growth engine.



What separates organizations that successfully scale AI agents from those that struggle?
Our analysis revealed a group of standout performers that have mastered three critical dimensions: optimizing AI ROI amid cost unpredictability, prioritizing rigorous governance, and integrating data sources beyond Salesforce. Their results speak volumes: 60% greater efficiency, 57% more effective customer insights, more than two times greater pipeline expansion, and their AI investments deliver expected ROI more frequently than their peers.

What generative and agentic AI use cases show the most visible ROI?
Salesforce customers report generative AI is delivering the strongest ROI in marketing, sales, and IT, while AI agents and assistants are gaining early traction in IT, sales, and customer service.

How can I ensure data privacy and compliance when deploying AI agents?
Nearly three in four Salesforce customers say the increasing use of digital labor elevates the need for risk management. Yet only 21% strongly agree that they have the governance necessary. Governance must evolve from a compliance function to the operating system for enterprise AI, becoming dynamic and embedded.

How do organizations ensure data integration?
Only 26% of executives report that their customer data primarily lives within Salesforce. Those connecting Salesforce to third-party platform and mainframe data see better business outcomes, including deeper customer insights and cost savings. Zero-copy data integration and data fabrics free data from back-office systems and mainframes without the cost and risk of moving it.

Despite rising AI investments, 74% of Salesforce customers struggle to move the needle on customer experience and engagement.

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Download the full report here.

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