



AI is Changing How We Create Value - Are You Ready?

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Private Equity has always been about value: creating it, capturing it, and accelerating it. But how we create value is evolving fast. At our recent Value Creation Day in London, we had the opportunity to gather with leaders across the private equity ecosystem to explore one of the most important forces reshaping our work: AI.

The conversations were candid, strategic, and energizing. From transforming operating models to rethinking portfolio analytics, we saw clearly that AI, when trusted and integrated, can unlock a new pace and scale of transformation.

Here are three key takeaways from the day that I believe every PE operating team should be thinking about:

1. AI Agents Will Redefine How Work Gets Done

Brent Hayward, Salesforce's Head of Competitive Intelligence, shared in his "Future of AI" session, we're moving beyond automation to a world of agentic AI, where intelligent digital agents don't just support employees but can be employees. These agents can complete tasks, learn, and adapt, unlocking new customer engagement models and workforce productivity gains.

We're already seeing this across our Agentforce programs, where PE-backed portfolio companies are using agents to:

- Automate high-frequency tasks in sales, service, and operations
- Personalize engagement across A2B (agent-to-business) and A2C (agent-to-customer) models
- Build smarter business processes that drive margin improvement and customer retention

Our proprietary xGen and polyphonic agent models make this real, not theoretical. The future of work will be agent-driven and early adopters are already realizing business ROI.



2. Without Trust, AI Will Stall

AI's value depends on trust and trust starts with governance. In his session, Adam Burrows, SSVP Strategic Initiatives, Office of the CLO from Salesforce's Legal & Corporate Affairs, outlined what it takes to ensure AI is safe and accountable across the full agent lifecycle. From design to deployment, operating teams must be thinking about:

- Preventative guardrails (like policy-based prompts and role-based access)
- Runtime protections (including prompt injection detection, toxicity filters, and supervisory LLMs)
- Self-improving models that evolve based on real usage

Salesforce provides all of these critical components within our deeply integrated platform; delivering a Trusted AI framework that's both proven and open, giving PE firms the confidence to scale AI responsibly across diverse portfolios. It's not about slowing down, it's about enabling faster, safer innovation.

3. Analytics Need to Work for Agents Too

During a technical deep dive, Laura Granek, Global GTM & Product- EMEA & APC Manager, and Laurent Vincent Byche, Director, Data & AI Solutions, EMEA, showed how Tableau Next is redefining portfolio analytics. Built on an API-first architecture and integrated with Agentforce, Tableau Next helps companies operationalize insights across humans and AI agents, making data not just accessible, but actionable.

It's the kind of analytics that empowers firms to:

- Monitor portfolio performance in real time
- Surface growth and consolidation opportunities across tech stacks
- Provide agents with the right data context to act intelligently

When pulling from multiple data sources both within and outside Salesforce using our Data Cloud with Zero Copy capabilities, this is the analytics engine that can help move portfolio companies from using their current reactive dashboards to proactive decision-making.

Why This Matters for PE

Our Global Private Equity and Venture Capital Practice works with PE firms to unlock the power of the Salesforce platform to accelerate value creation across the entire investment lifecycle from due diligence to exit. Our dedicated team brings together AI, data, CRM, and portfolio strategy expertise to help your operating partners and portfolio companies drive measurable value fast.

Whether through hands-on programs like our Agentforce 1:1 PortCo Activation, digital assessments, or analytics workshops, our goal is simple: help you move faster, with more confidence, and with a clearer line to EBITDA impact.

AI isn't just coming to Private Equity. It's already here. The question is: **How will you lead with it?**

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