

Forward Looking Statement

This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, future financial performance, anticipated growth, industry prospects, environmental, social and governance goals, our strategies, expectation or plans regarding our investments, including strategic investments or acquisitions, our beliefs or expectations regarding our competition, our intentions regarding use of future earnings or dividends, and the expected timing of product releases and enhancements. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, Salesforce's results could differ materially from the results expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: our ability to maintain security levels and service performance that meet the expectations of our customers, and the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate performance degradation and security breaches; the expenses associated with our data centers and third-party infrastructure providers; our ability to secure additional data center capacity; our reliance on third-party hardware, software and platform providers; uncertainties regarding AI technologies and its integration into our product offerings; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy, cross-border data transfers and import and export controls; current and potential litigation involving us or our industry, including litigation involving acquired entities, and the resolution or settlement thereof; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including any efforts to expand our services; the success of our strategy of acquiring or making investments in complementary businesses, joint ventures, services, technologies and intellectual property rights; our ability to complete, on a timely basis or at all, announced transactions; our ability to realize the benefits from acquisitions, strategic partnerships, joint ventures and investments, and successfully integrate acquired businesses and technologies; our ability to compete in the markets in which we participate; the success of our business strategy and our plan to build our business, including our strategy to be a leading provider of enterprise cloud computing applications and platforms; our ability to execute our business plans; our ability to continue to grow unearned revenue and remaining performance obligation; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; our ability to limit customer attrition and costs related to those efforts; the success of our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations, including as a result of acquisitions; our ability to preserve our workplace culture, including as a result of our decisions regarding our current and future office environments or remote work policies; our dependency on the development and maintenance of the infrastructure of the Internet; our real estate and office facilities strategy and related costs and uncertainties; fluctuations in, and our ability to predict, our operating results and cash flows; the variability in our results arising from the accounting for term license revenue products; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; the impact of future gains or losses from our strategic investment portfolio, including gains or losses from overall market conditions that may affect the publicly traded companies within our strategic investment portfolio; our ability to protect our intellectual property rights; our ability to maintain and enhance our brands; the impact of foreign currency exchange rate and interest rate fluctuations on our results; the valuation of our deferred tax assets and the release of related valuation allowances; the potential availability of additional tax assets in the future; the impact of new accounting pronouncements and tax laws; uncertainties affecting our ability to estimate our tax rate; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property, including the tax rate, the timing of transfers and the value of such transferred intellectual property; uncertainties regarding the effect of general economic, business and market conditions, including inflationary pressures, general economic downturn or recession, market volatility, increasing interest rates, changes in monetary policy and the prospect of a shutdown of the U.S. federal government; the potential impact of financial institution instability; the impact of geopolitical events, including the ongoing armed conflict in Europe; uncertainties regarding the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; our ability to execute our share repurchase program; our ability to comply with our debt covenants and lease obligations; the impact of climate change, natural disasters and actual or threatened public health emergencies; expected benefits of and timing of completion of the restructuring plan and the expected costs and charges of the restructuring plan, including, among other things, the risk that the restructuring costs and charges may be greater than we anticipate, our restructuring efforts may adversely affect our internal programs and ability to recruit and retain skilled and motivated personnel, our restructuring efforts may be distracting to employees and management, our restructuring efforts may negatively impact our business operations and reputation with or ability to serve customers, and our restructuring efforts may not generate their intended benefits to the extent or as quickly as anticipated; and our ability to achieve our aspirations, goals and projections related to our environmental, social and governance initiatives, including our ability to comply with emerging corporate responsibility regulations.



 **tableau**[®]
from  Salesforce



Thank You



The 3rd wave of AI is Agents



Wave 1

Predictive



Wave 2

Copilots



Wave 3



Fast



Available 24 x 7



Proactive



Scalable



Autonomous



Wave 4

Robotics



Wave 5

Artificial General
Intelligence





AI will radically transform analytics

50%

of business decisions
will be augmented or
automated by AI
agents for decision
intelligence by 2027

Legacy BI

Fragmented data.
Hard-to-find insights.
Limited productivity.



Agentic Analytics

Contextual, actionable insights.
Conversational analytics.
Proactive alerts.



Humans and agents turn data into action

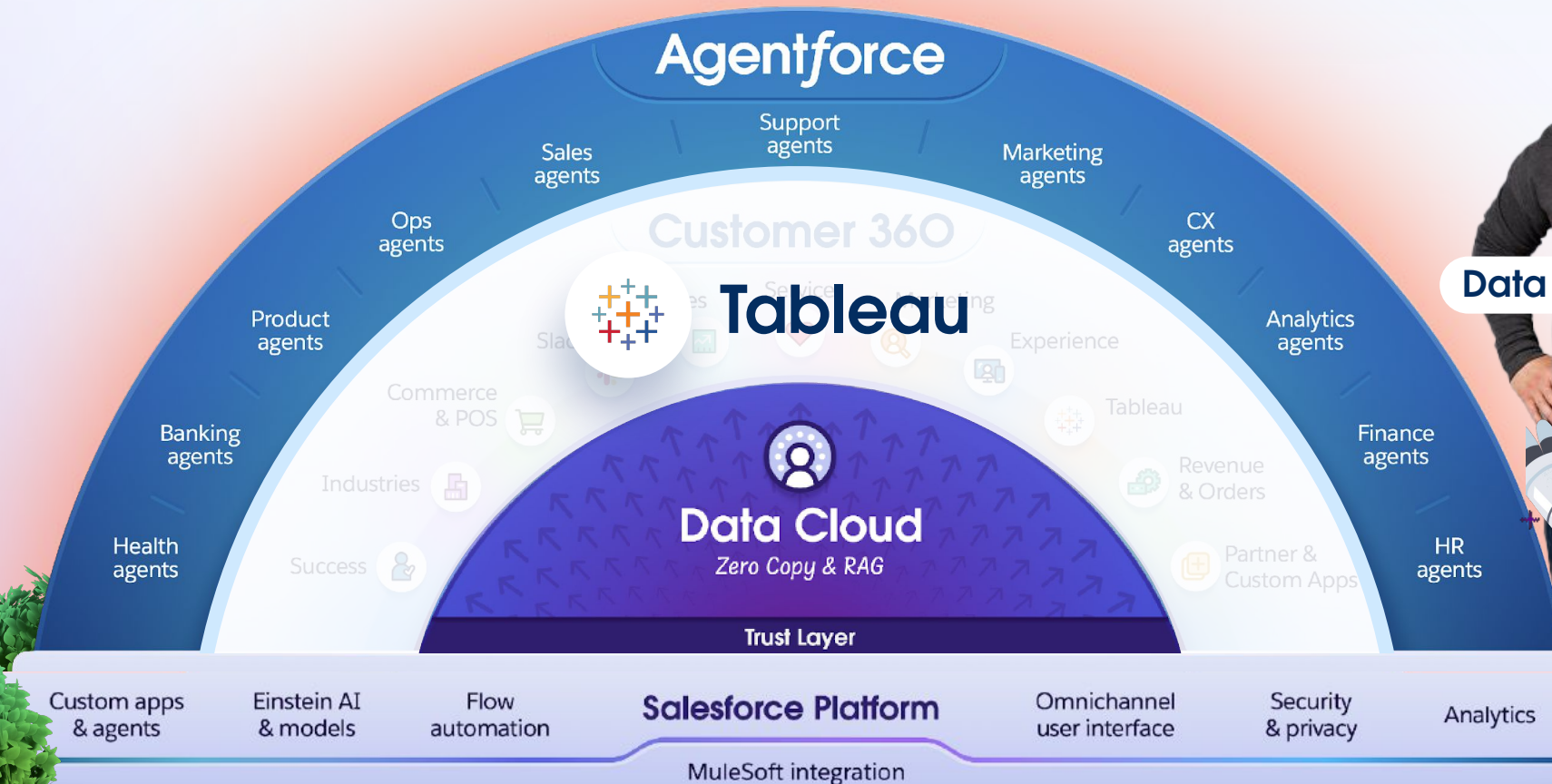


Tableau Next ushers in the era of agentic analytics

Traditional BI

Manual Data Prep

Human-driven Insights

Swivel Chair Actions

Agentic Analytics

Automated Data Prep

AI-augmented Insights

Seamless Actionability



Tableau Next

Humans and agents
turn data into action

Make better decisions with AI agents that understand your business context

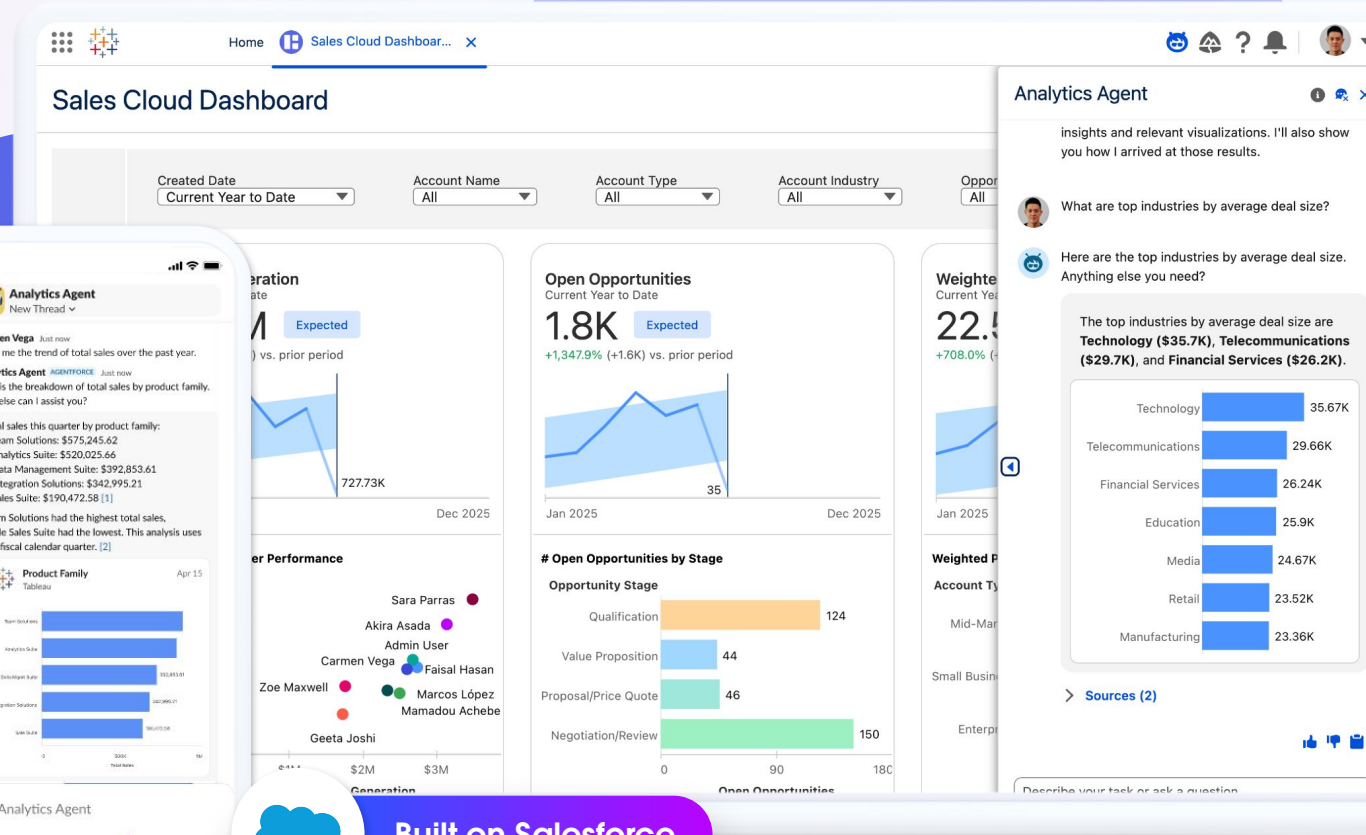
Transform data insights into real business outcomes with built-in actionability

Get value faster with purpose-built analytics apps for every user

Scale trusted analytics across the enterprise with composable, verified assets



Deeply integrated with Agentforce



The image shows a Tableau dashboard for 'Sales Cloud Dashboard' with various charts and filters. An 'Analytics Agent' chat window is overlaid on the right, showing a conversation about top industries by average deal size. The chat window includes a search bar, a list of results, and a 'Sources (2)' link.

Analytics Agent Chat:

insights and relevant visualizations. I'll also show you how I arrived at those results.

What are top industries by average deal size?

Here are the top industries by average deal size. Anything else you need?

The top industries by average deal size are **Technology (\$35.7K)**, **Telecommunications (\$29.66K)**, and **Financial Services (\$26.2K)**.

Industry	Average Deal Size
Technology	35.67K
Telecommunications	29.66K
Financial Services	26.24K
Education	25.9K
Media	24.67K
Retail	23.52K
Manufacturing	23.36K

> Sources (2)



Built on Salesforce

Without Tableau Next

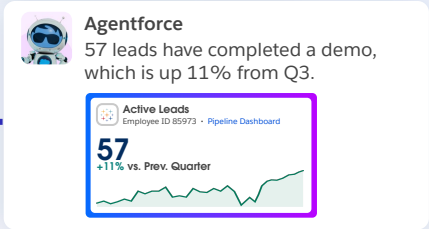
With Tableau Next

How many active leads are in my pipe? Am I trending up from last quarter?

How many active leads are in my pipe? Am I trending up from last quarter?

Knows your business context

Delivers insights and visualization



Inaccurate responses

Sure! You have 130 total leads in your pipeline.

Here is the detailed list:

Northeast
Lead A: Demo completed 01/15
Lead B: Demo completed 01/16
Lead C: Demo completed 01/17
Lead D: Demo completed 01/18
Show More

Information overload

I see a dip in win rate last quarter. Any insights on what happened?

Inspires more questions

Clarifies intent

Agentforce
Sure! I can help with that. Could you clarify what you mean by win rate?

It means percentage of closed deals out of total opportunities.

Recommends next steps

Agentforce
Your team's Enterprise win rate is down 15% this quarter, mainly due to stalled final-stage deals. History shows \$100K+ deals lingering past 30 days have a 60% fall-off rate. Prioritize these with discounts or executive involvement to close faster.



Tableau Next

The world's first agentic analytics platform

Agentforce Tableau



Action Layer

Visualization Layer

Semantic Layer

Data Layer

Tableau Marketplace



Private

Share, reuse,
and extend
assets



Public

Distribute and
monetize
solutions

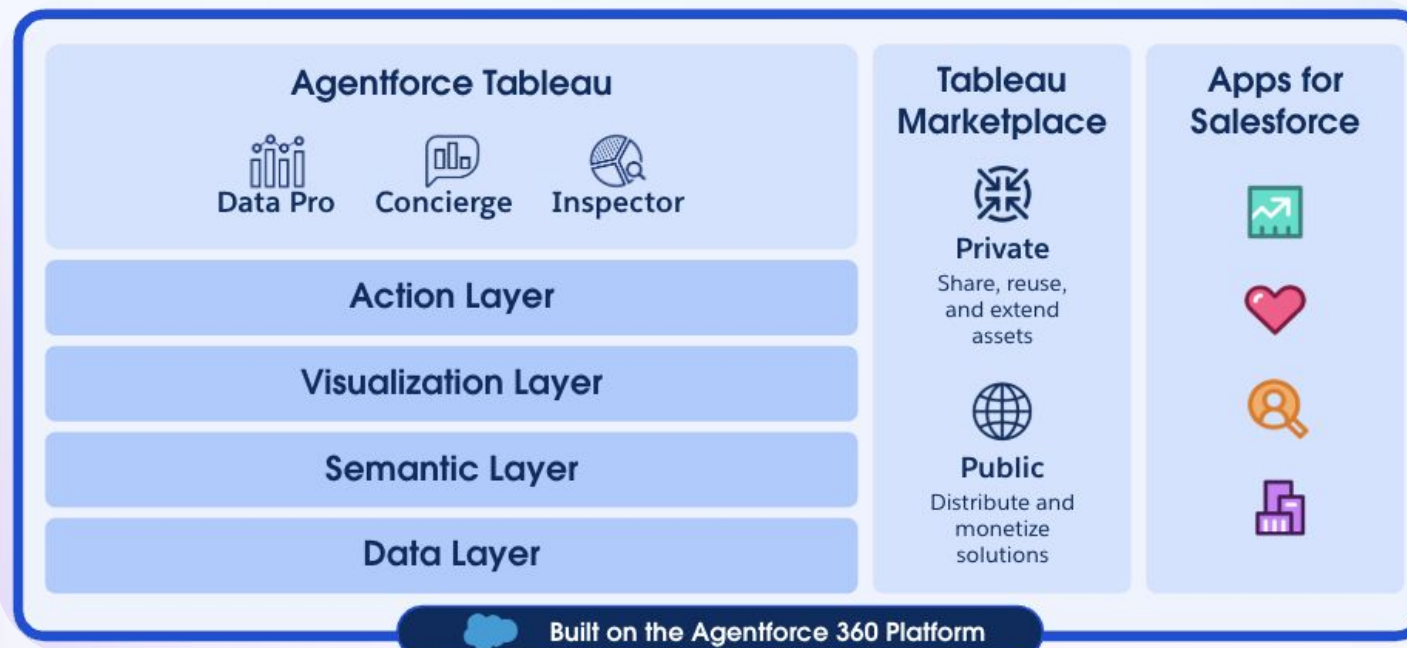
Apps for Salesforce



Built on the Agentforce 360 Platform

Tableau Next

The world's first agentic analytics platform



Data Pro GA 2H'25

Concierge GA Now

Inspector Beta 2H'25

Semantics GA Now

w/Slack GA Now

Sales GA Oct '25

Service GA Now

Marketing GA Now

Agentforce Tableau

Data Pro Concierge Inspector

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Tableau Marketplace



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Distribute and monetize solutions

Apps for Salesforce



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Apps for Salesforce



Built on the Agentforce 360 Platform

Data remains
fragmented
and difficult to
activate



71%

of company
applications are
disconnected

Introducing

Data 360

Activate Trusted Data Everywhere

Make all your enterprise data **ready for action**, without moving it.

Power workflows, decisions, and analytics with **one complete data source**.

Bring **context and insight** to your data so Agentforce can put it to work.



How Data 360 Works

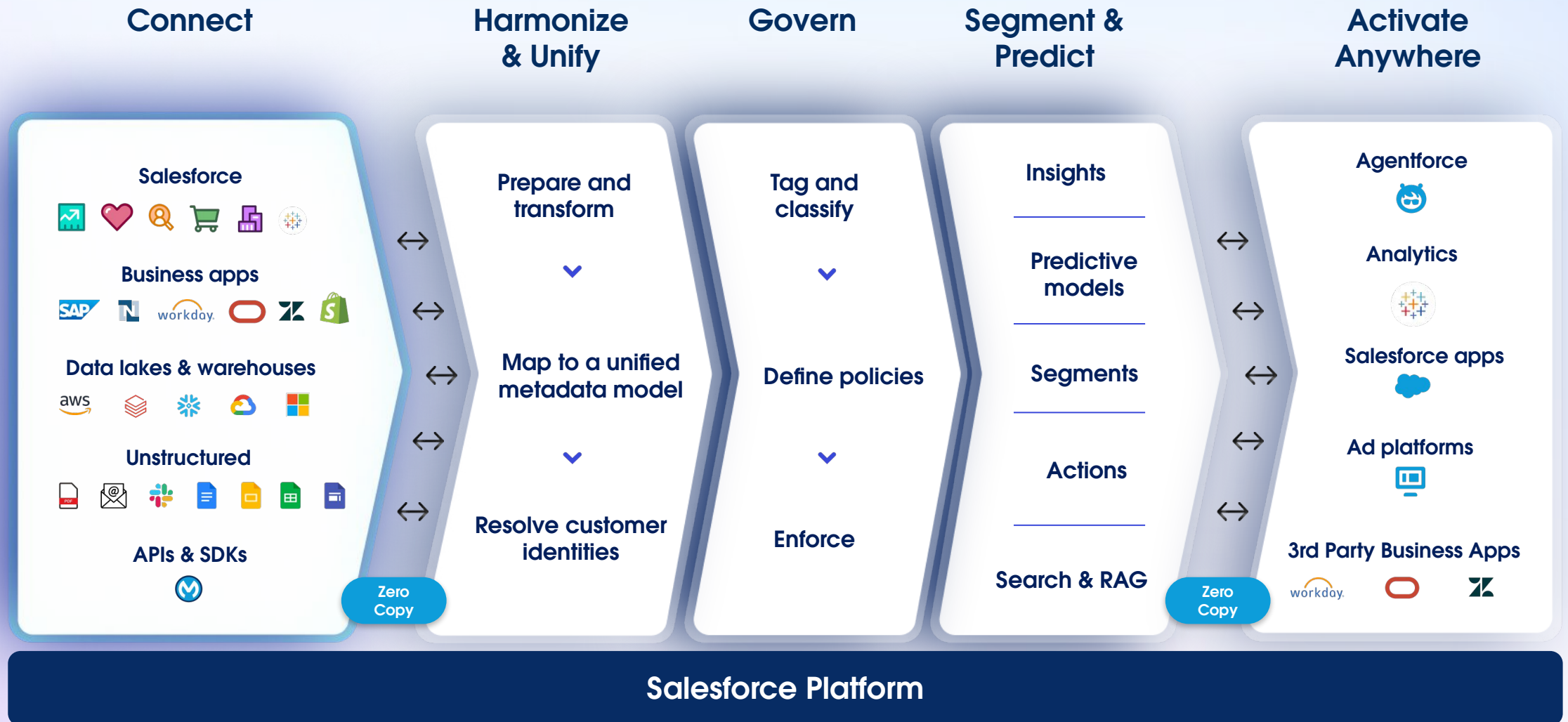


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**AI is only as
good as the
data you feed it**

60%

**of projects
will fail without
AI-ready data**

Semantic Layer

The bridge between
data & insights



Enrich data with business knowledge for meaningful insights

BI Tools & Agentic Analytics



Enterprise Reports



Customer 360 Applications



Tableau Semantics (Semantic Layer)

Translates complex data into familiar business terms

Data Layer

Ingests, unifies, and harmonizes data in a single source of truth

Tableau Semantics

Unleash the power of your data and AI with business knowledge

Unify and Scale Trusted Data

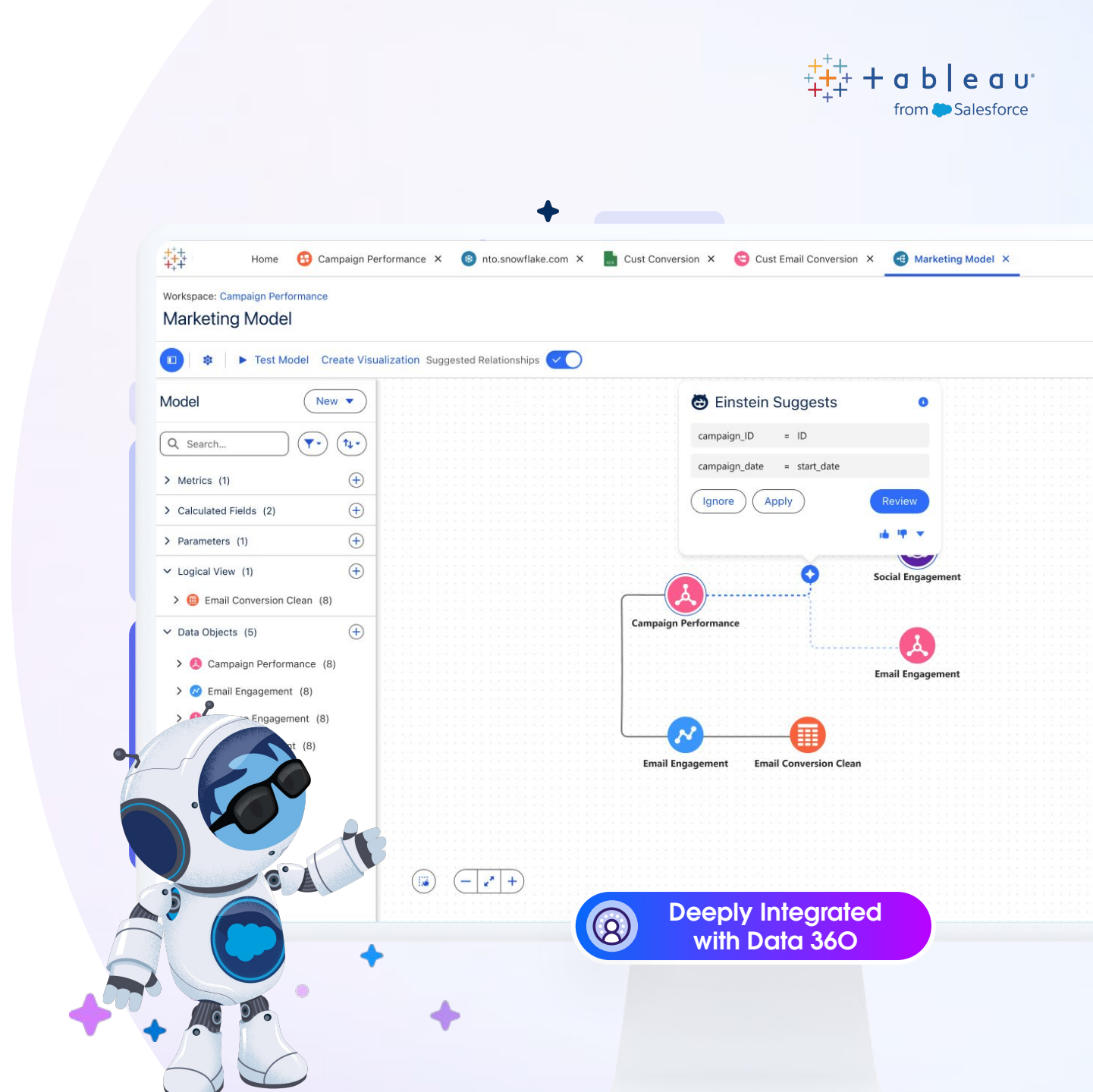
Centralize your data and metrics in a single, governed layer for easy analysis and increased efficiency

Accelerate Time to Insight

Empower self-serve analytics and reduce manual effort with AI-powered features: relationship suggestions

Enrich Agents with Business Context

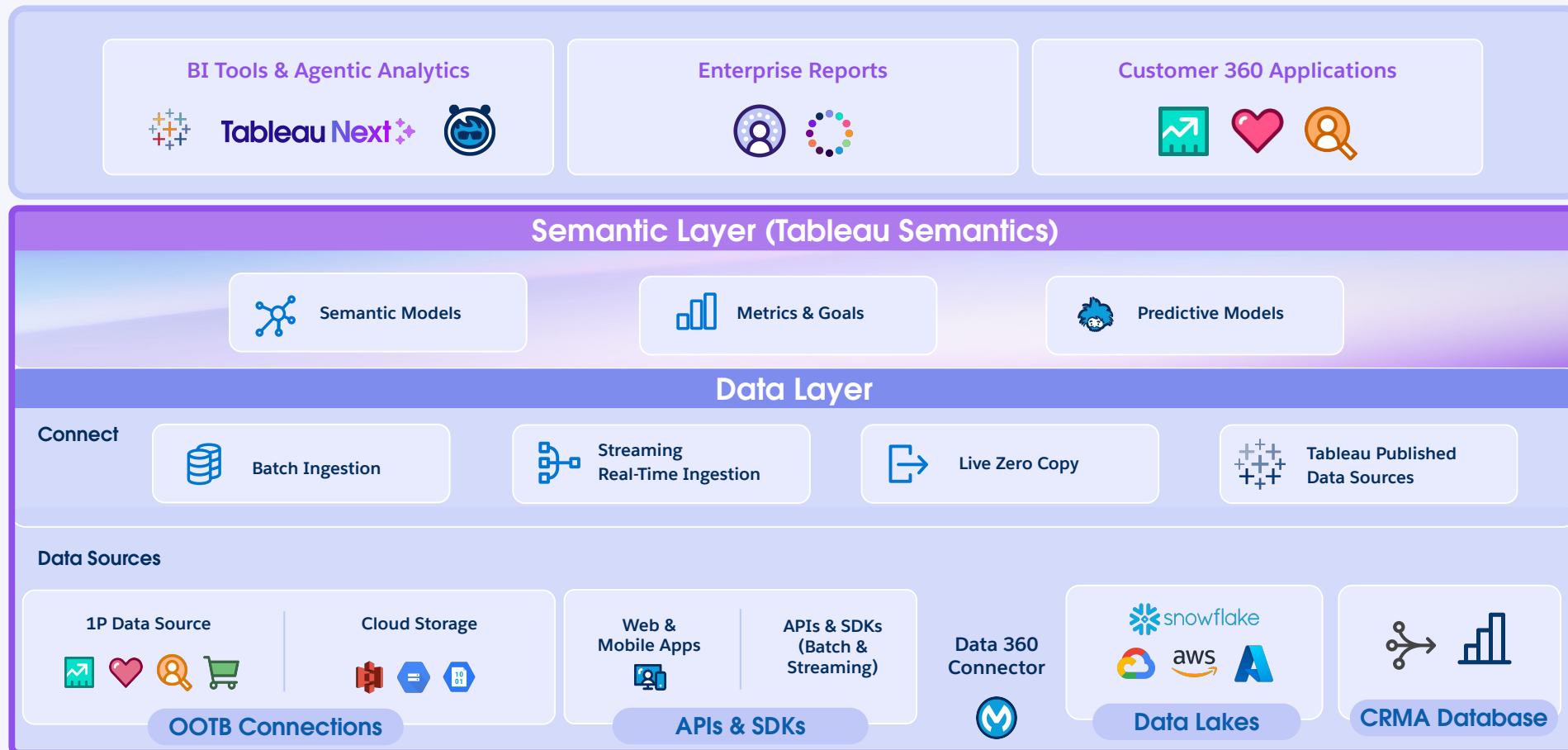
Get more accurate and relevant answers from your data with real-time business context



 Deeply Integrated
with Data 360

Tableau Semantics in Data 360: Powering Your Data with Business Context

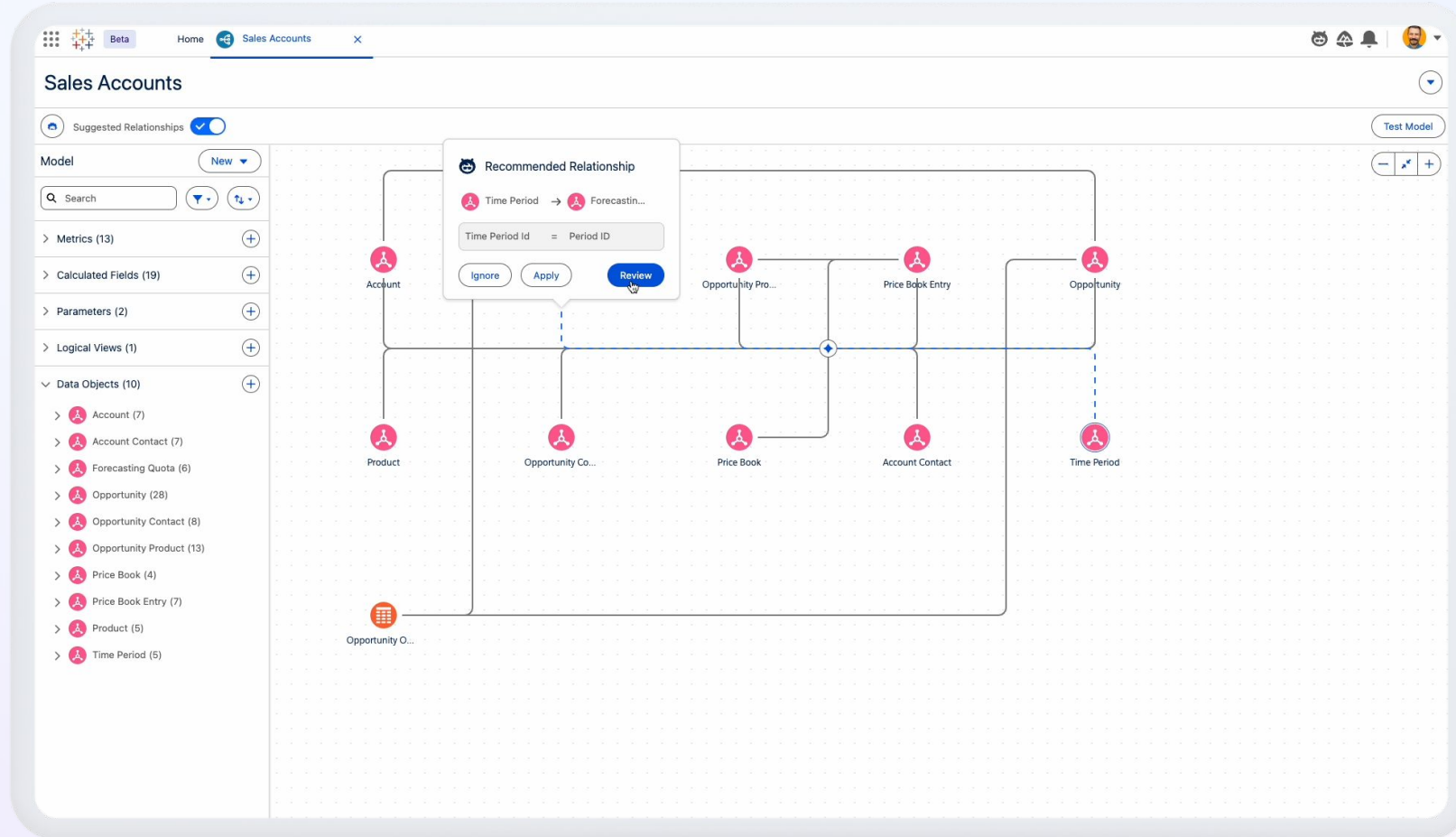
Data 360



 **Agentforce 360 Platform: Enterprise-proven, API-first**

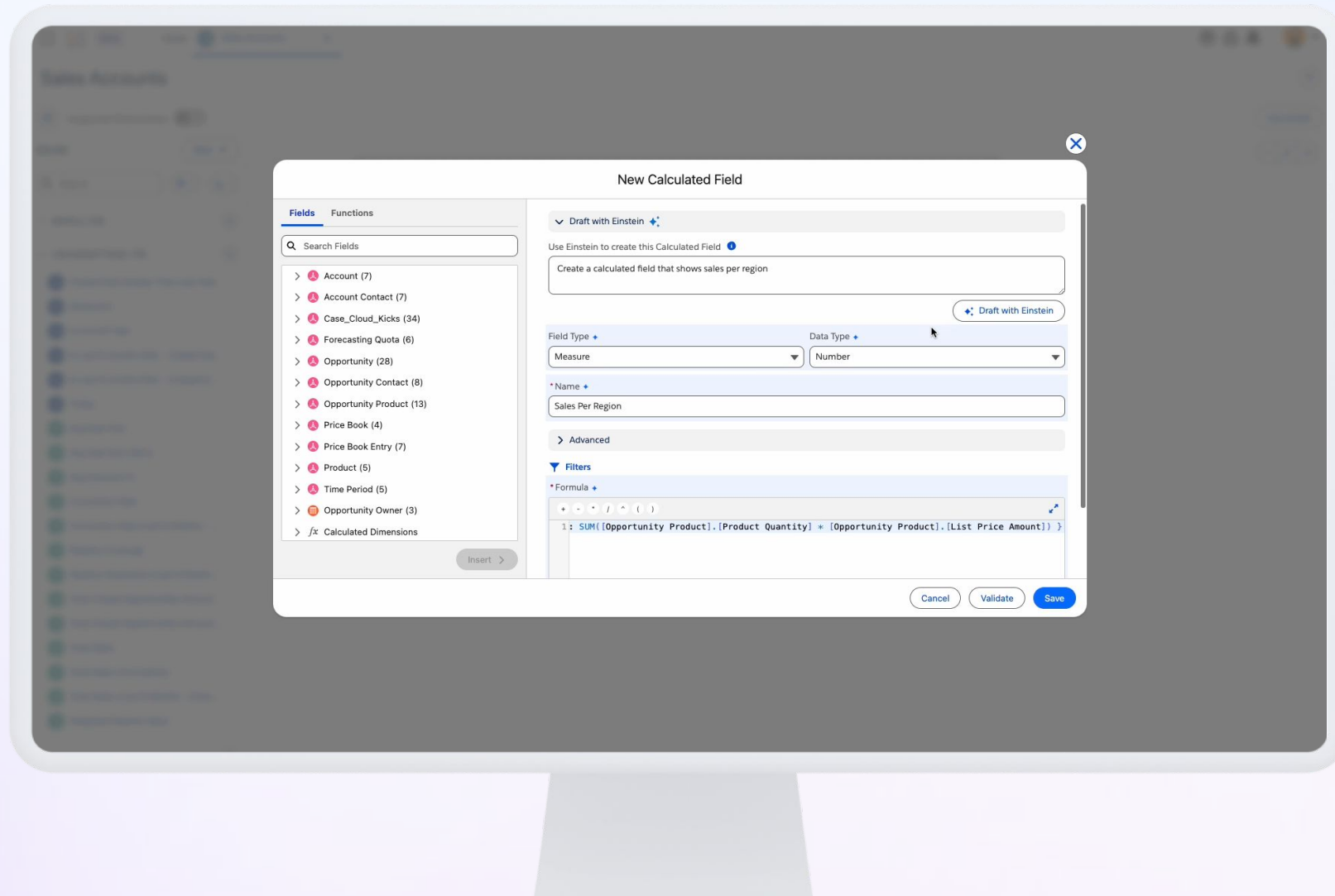
Relationship Suggestions

Get suggested relationships between data model objects



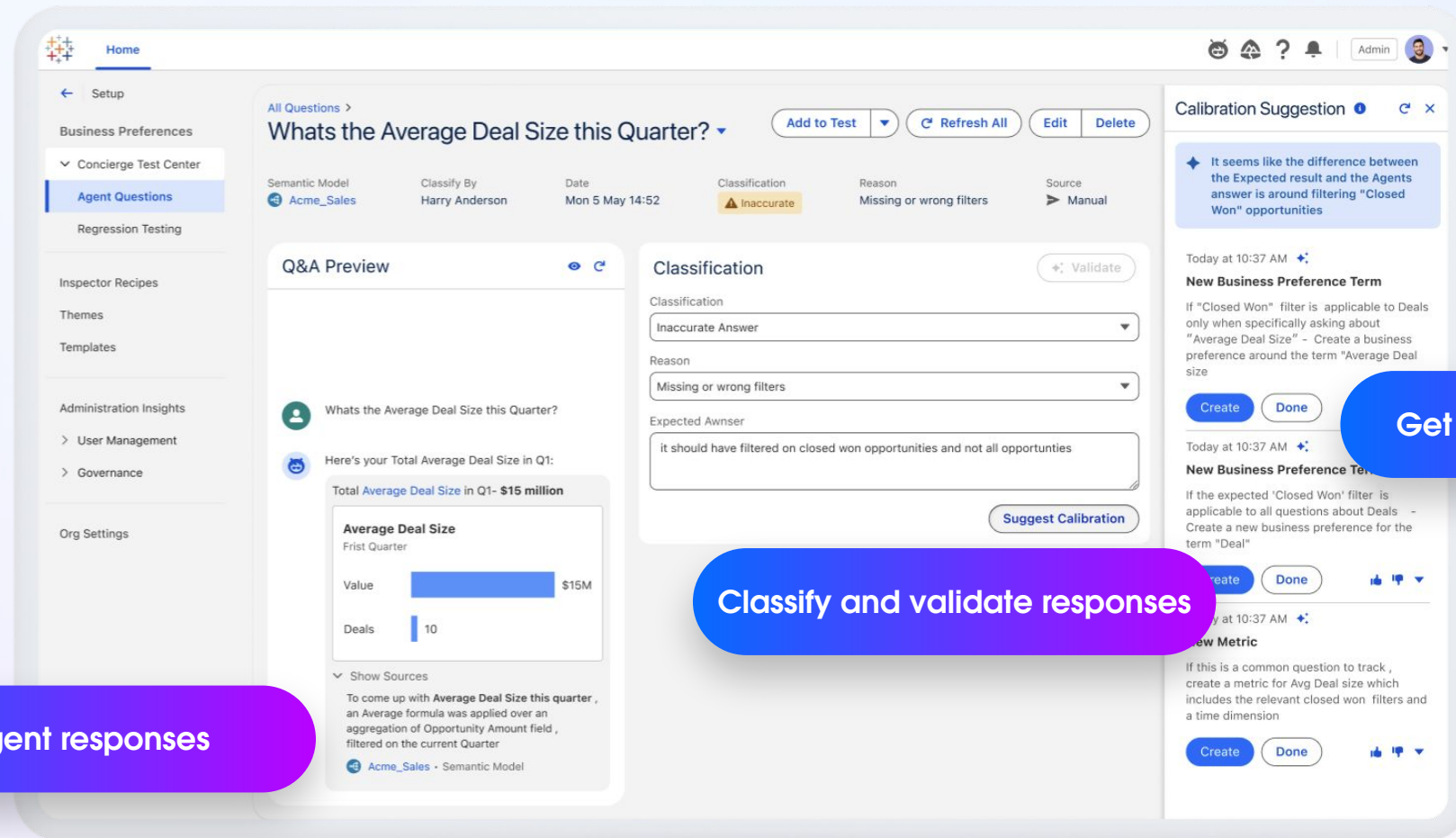
Auto-Calculated Fields

Draft calculated fields in natural language



Q&A Calibration

Test and improve agent accuracy



The screenshot displays the Tableau Q&A Calibration interface. On the left is a navigation sidebar with options like Setup, Business Preferences, and Agent Questions. The main area shows a question: "Whats the Average Deal Size this Quarter?". Below the question is a Q&A Preview with a bar chart showing an average deal size of \$15M for 10 deals. To the right is a Classification section where the answer is marked as "Inaccurate" with the reason "Missing or wrong filters". On the far right, a "Calibration Suggestion" panel offers advice on filtering "Closed Won" opportunities. Three callout boxes highlight key features: "Test agent responses" (pointing to the question), "Classify and validate responses" (pointing to the classification section), and "Get calibration suggestions" (pointing to the suggestion panel).

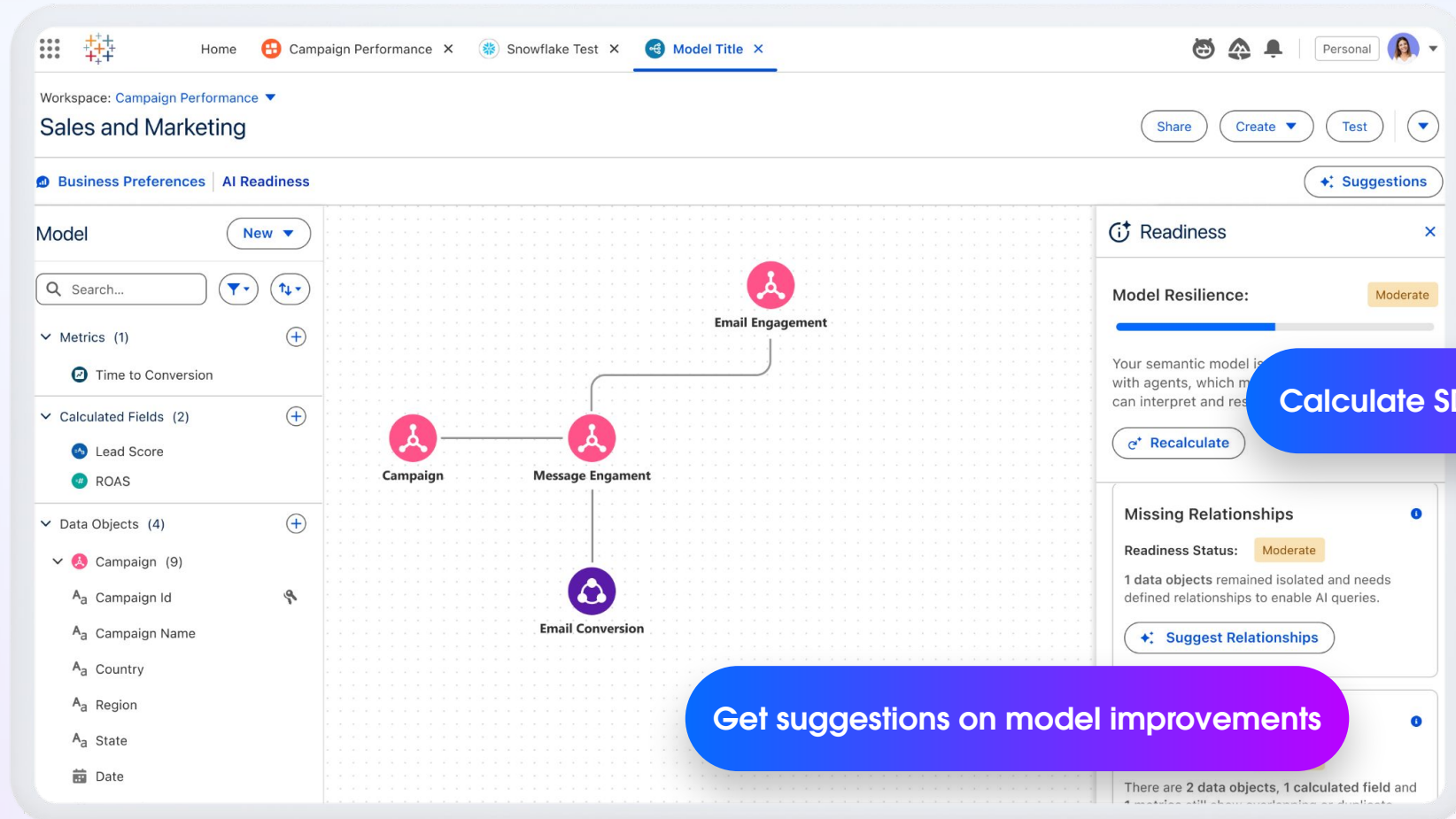
Test agent responses

Classify and validate responses

Get calibration suggestions

Semantic Model AI Optimization

Optimize semantic model for better agent performance



The screenshot shows the Tableau Semantic Model AI Optimization interface. The top navigation bar includes 'Home', 'Campaign Performance', 'Snowflake Test', and 'Model Title'. The workspace is 'Campaign Performance' and the model is 'Sales and Marketing'. The interface is divided into three main sections: a left sidebar for model configuration, a central canvas for the semantic model diagram, and a right sidebar for model readiness and suggestions.

Model Configuration (Left Sidebar):

- Model: New
- Search: Search...
- Metrics (1): Time to Conversion
- Calculated Fields (2): Lead Score, ROAS
- Data Objects (4): Campaign (9)
 - Campaign Id
 - Campaign Name
 - Country
 - Region
 - State
 - Date

Semantic Model Diagram (Center Canvas):

```
graph TD; Campaign((Campaign)) --- MessageEngagement((Message Engagement)); MessageEngagement --- EmailEngagement((Email Engagement)); MessageEngagement --- EmailConversion((Email Conversion));
```

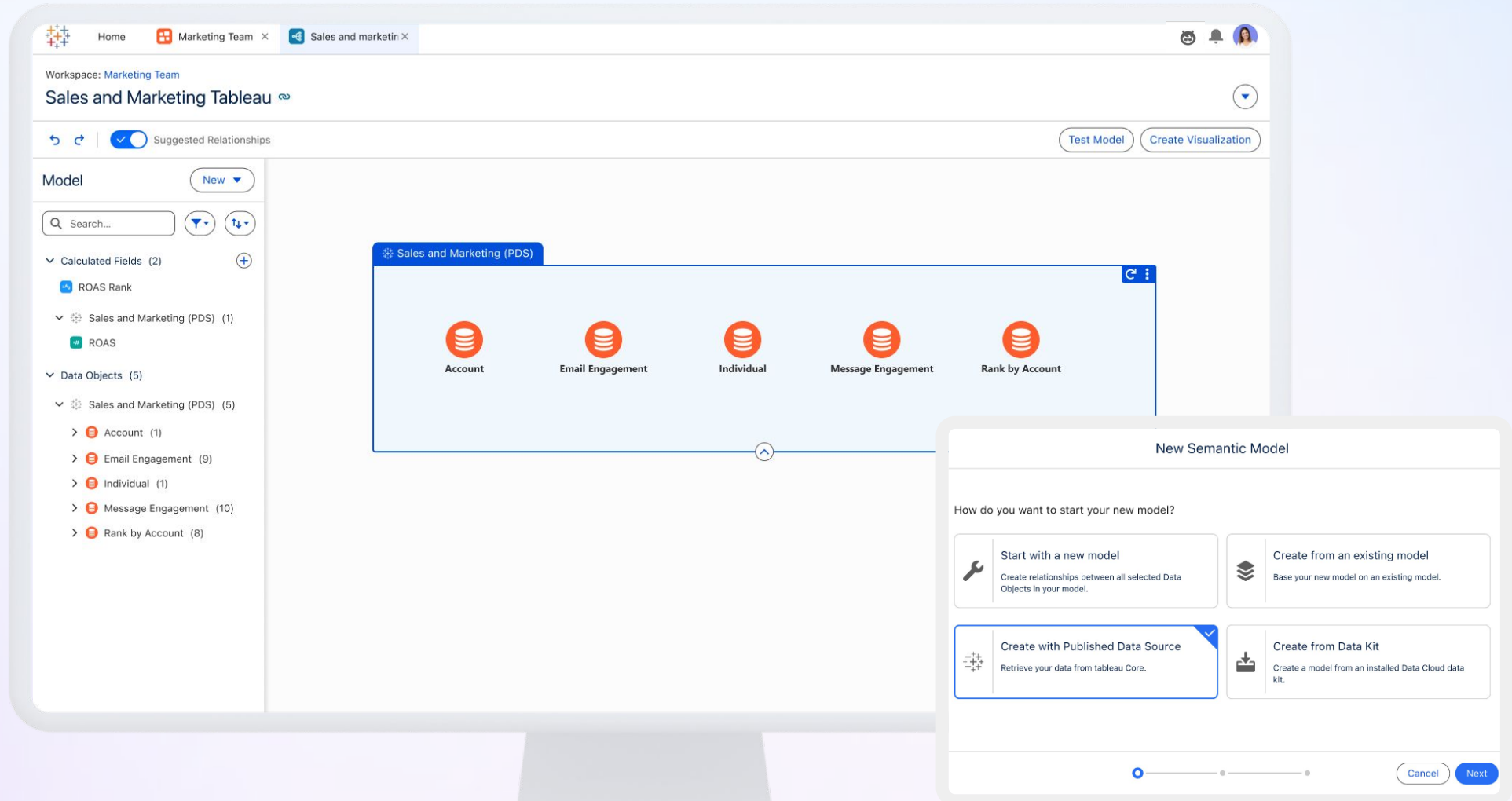
Model Readiness (Right Sidebar):

- Model Resilience: Moderate
- Readiness Status: Moderate
- Missing Relationships: 1 data objects remained isolated and needs defined relationships to enable AI queries.

Callouts:

- Calculate SDM optimization** (Purple callout over the Recalculate button)
- Get suggestions on model improvements** (Blue callout over the Suggest Relationships button)

Published Data Sources (PDS) Bring PDS into Tableau Semantics



The screenshot displays the Tableau Semantic Model workspace for a workspace named "Marketing Team". The workspace is titled "Sales and Marketing Tableau". A "Suggested Relationships" toggle is turned on. The left sidebar shows the "Model" structure:

- Calculated Fields (2): ROAS Rank
- Sales and Marketing (PDS) (1): ROAS
- Data Objects (5):
 - Sales and Marketing (PDS) (5):
 - Account (1)
 - Email Engagement (9)
 - Individual (1)
 - Message Engagement (10)
 - Rank by Account (8)

The main workspace area shows a "Sales and Marketing (PDS)" connector with five data objects: Account, Email Engagement, Individual, Message Engagement, and Rank by Account. A "New Semantic Model" dialog box is open, asking "How do you want to start your new model?". The options are:

- Start with a new model: Create relationships between all selected Data Objects in your model.
- Create from an existing model: Base your new model on an existing model.
- Create with Published Data Source (selected): Retrieve your data from tableau Core.
- Create from Data Kit: Create a model from an installed Data Cloud data kit.

The dialog box has "Cancel" and "Next" buttons at the bottom right.

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Action Layer

Visualization Layer

Semantic Layer

Data Layer

Tableau Marketplace



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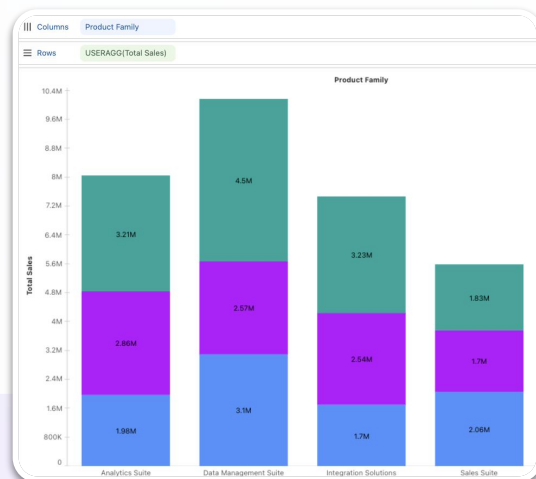


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Build AI-Powered, Reusable Visualizations to Deliver Insights on Demand

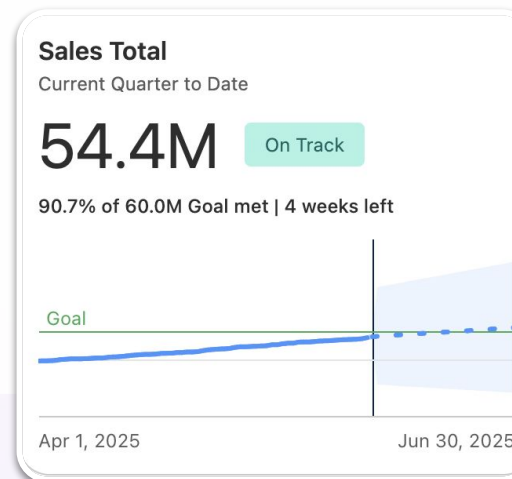
Visualizations

Visualize data instantly with intuitive drag and drop that can be embedded anywhere



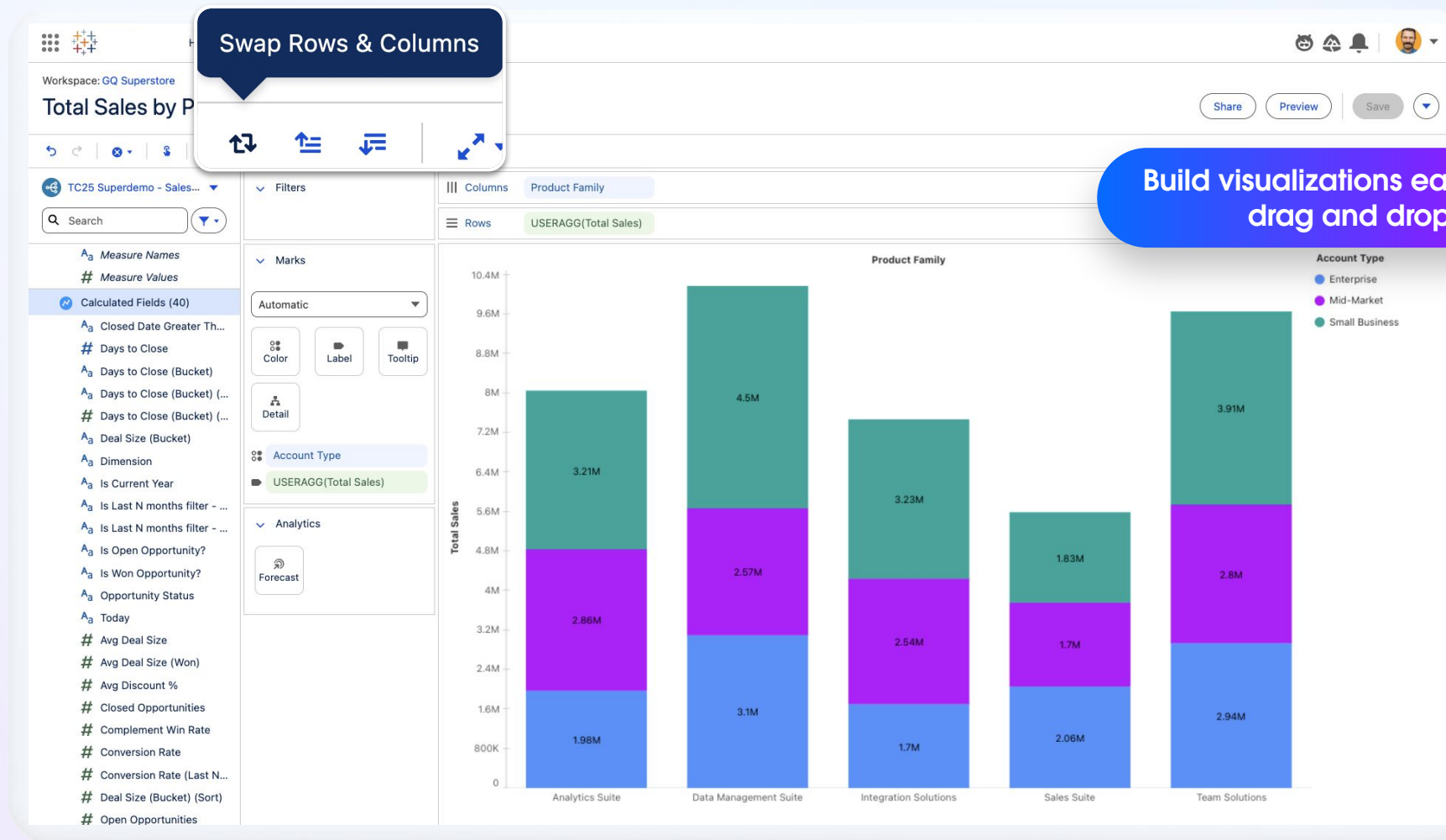
Metrics

Easily understand and track business performance from a single source of truth



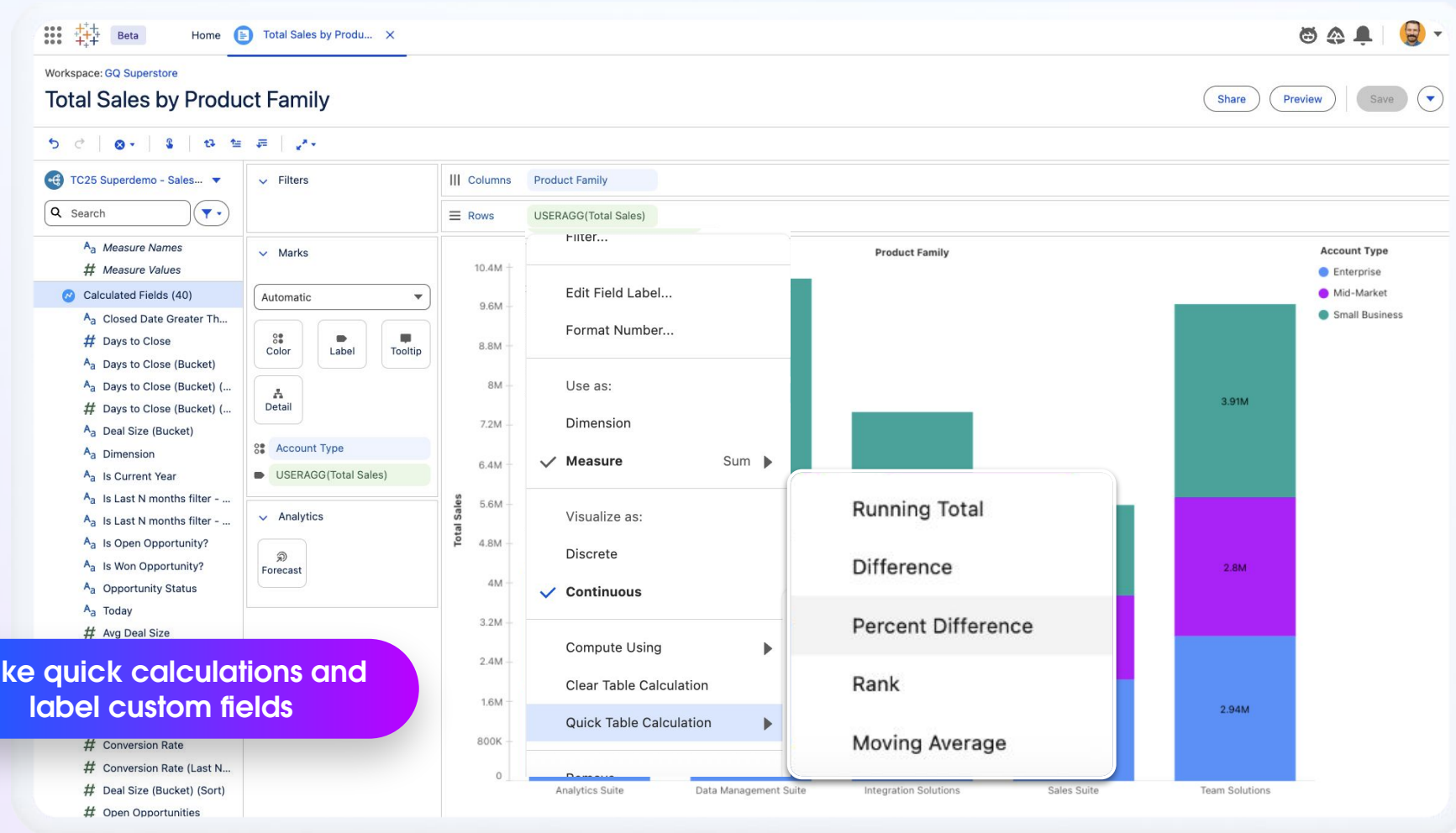
Visualization Layer

Bring data to life with intuitive building



Visualization Layer

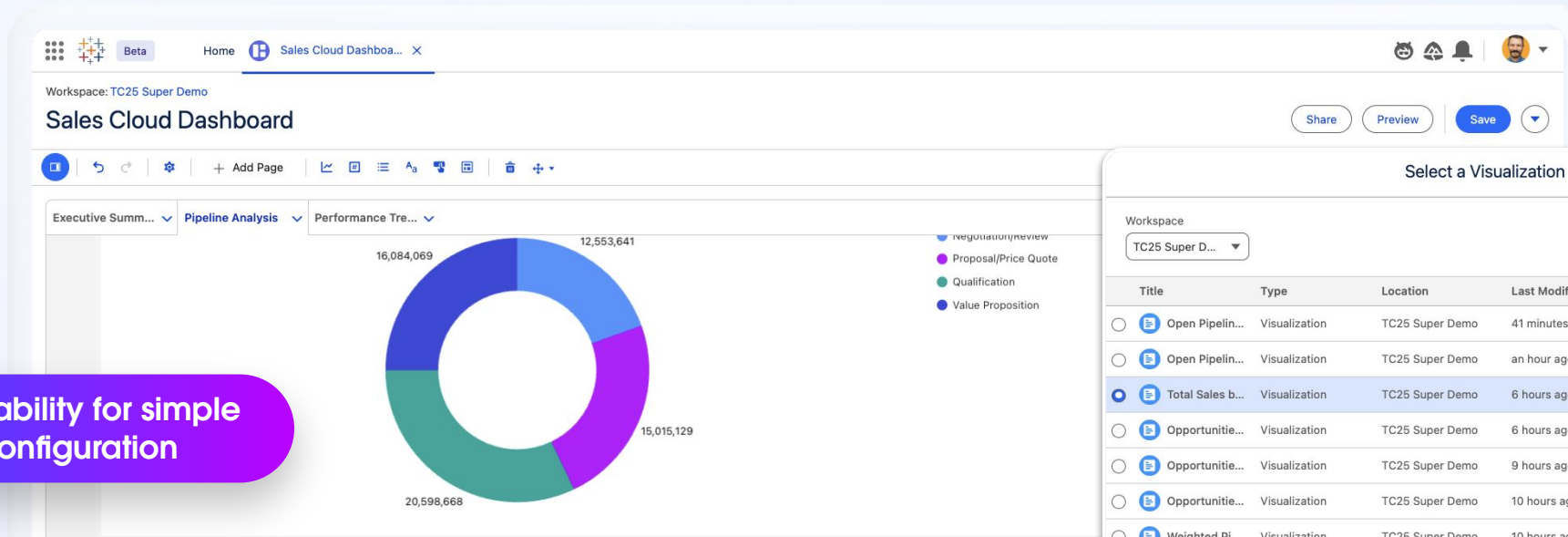
Iterate and customize quickly



Make quick calculations and label custom fields

Visualization Layer

Share, reuse and embed assets anywhere



Harness composability for simple dashboard configuration

Select a Visualization

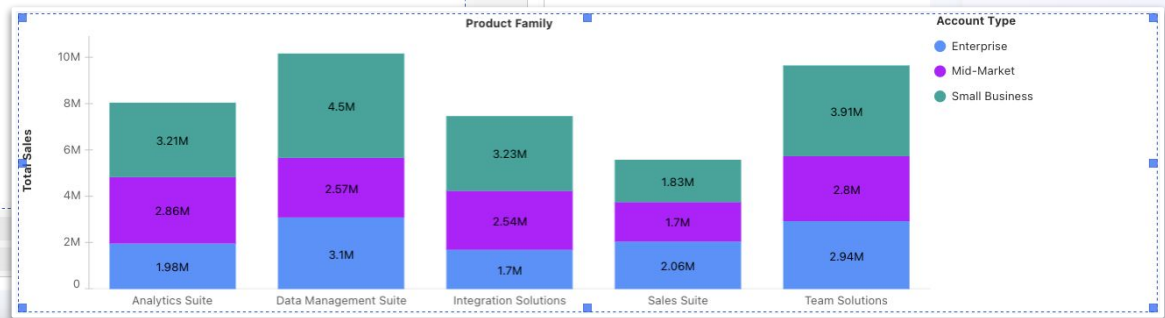
Workspace: TC25 Super D...

Title	Type	Location	Last Modified	Created
Open Pipelin...	Visualization	TC25 Super Demo	41 minutes ago	Me
Open Pipelin...	Visualization	TC25 Super Demo	an hour ago	Me
Total Sales b...	Visualization	TC25 Super Demo	6 hours ago	Me
Opportunitie...	Visualization	TC25 Super Demo	6 hours ago	Me
Opportunitie...	Visualization	TC25 Super Demo	9 hours ago	Me
Opportunitie...	Visualization	TC25 Super Demo	10 hours ago	Me
Weighted Pi...	Visualization	TC25 Super Demo	10 hours ago	Me

Data Source: TC25 Superdemo - Sales SDM
 Fields (4): Product_Family, Total_Sales_clc

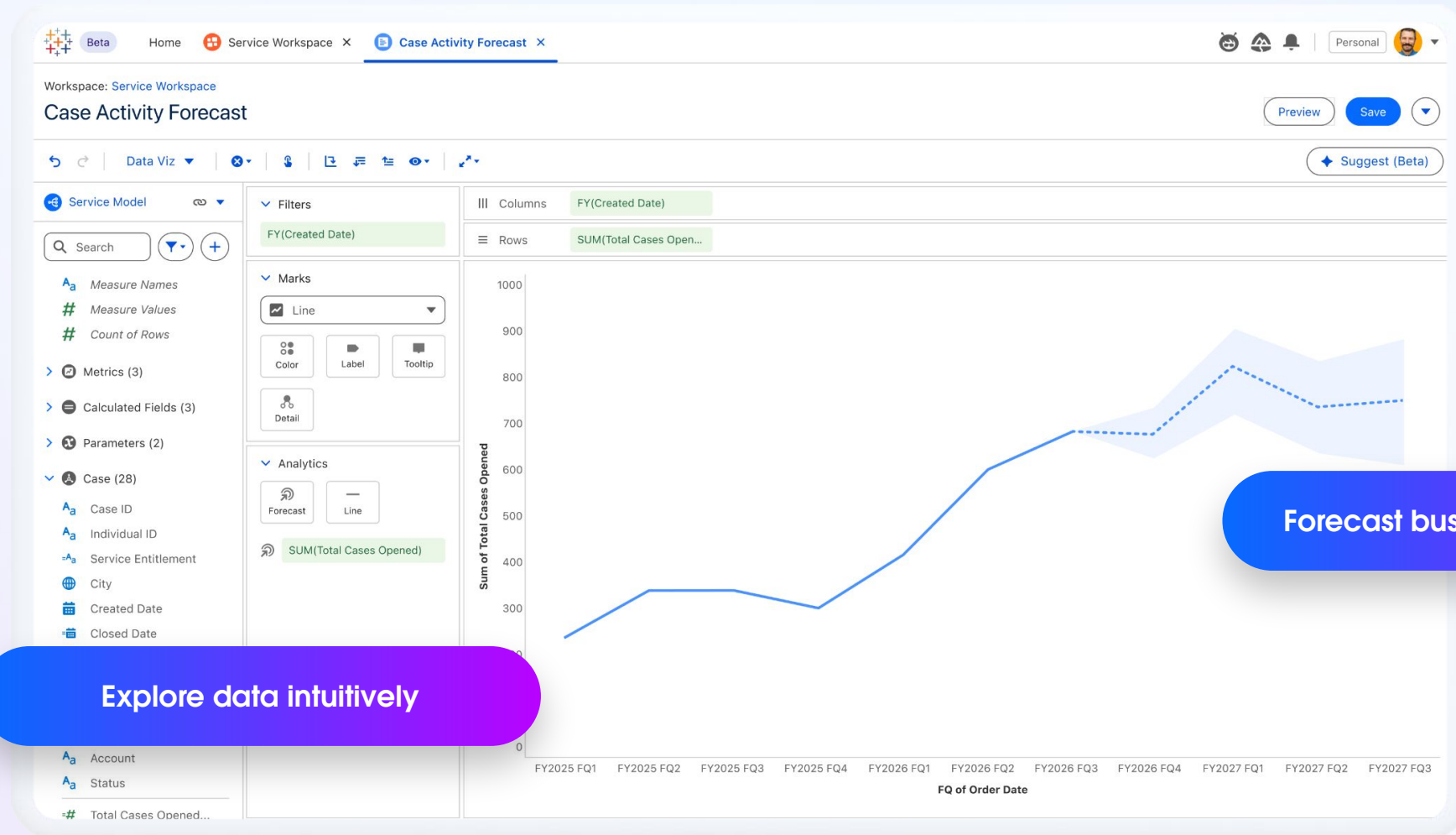
Create New Visualization Cancel Select

Reuse assets seamlessly



Visualization Layer

Predict future trends

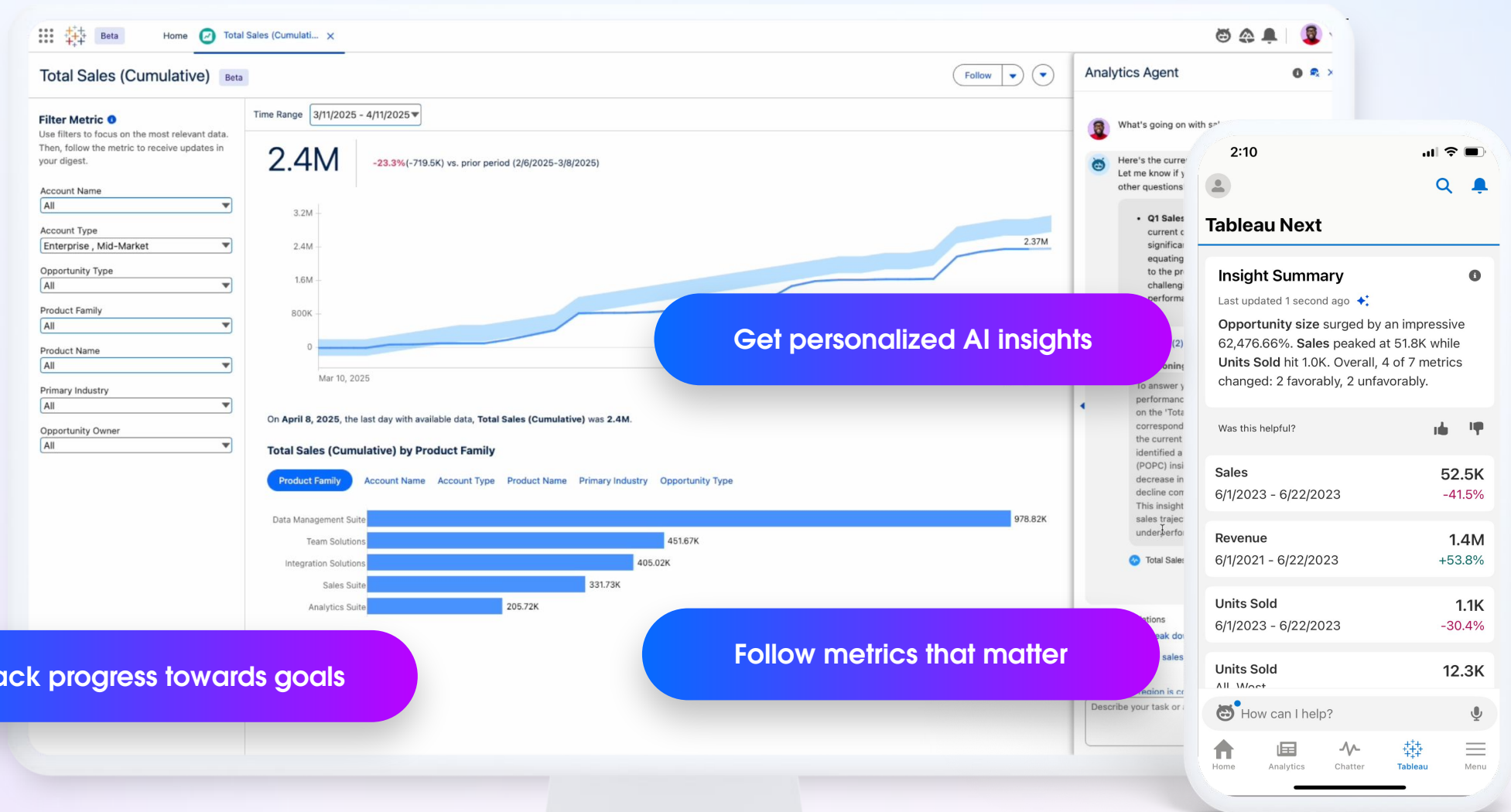


Explore data intuitively

Forecast business performance

Metrics

Track performance from a single source of truth



Total Sales (Cumulative) Beta

Time Range: 3/11/2025 - 4/11/2025

2.4M -23.3% (-719.5K) vs. prior period (2/6/2025-3/8/2025)

On **April 8, 2025**, the last day with available data, **Total Sales (Cumulative)** was **2.4M**.

Total Sales (Cumulative) by Product Family

Product Family	Account Name	Account Type	Product Name	Primary Industry	Opportunity Type	
Data Management Suite						978.82K
Team Solutions						451.67K
Integration Solutions						405.02K
Sales Suite						331.73K
Analytics Suite						205.72K

Get personalized AI insights

Track progress towards goals

Follow metrics that matter

Tableau Next

Insight Summary
 Last updated 1 second ago

Opportunity size surged by an impressive 62,476.66%. **Sales** peaked at 51.8K while **Units Sold** hit 1.0K. Overall, 4 of 7 metrics changed: 2 favorably, 2 unfavorably.

Was this helpful? 👍 👎

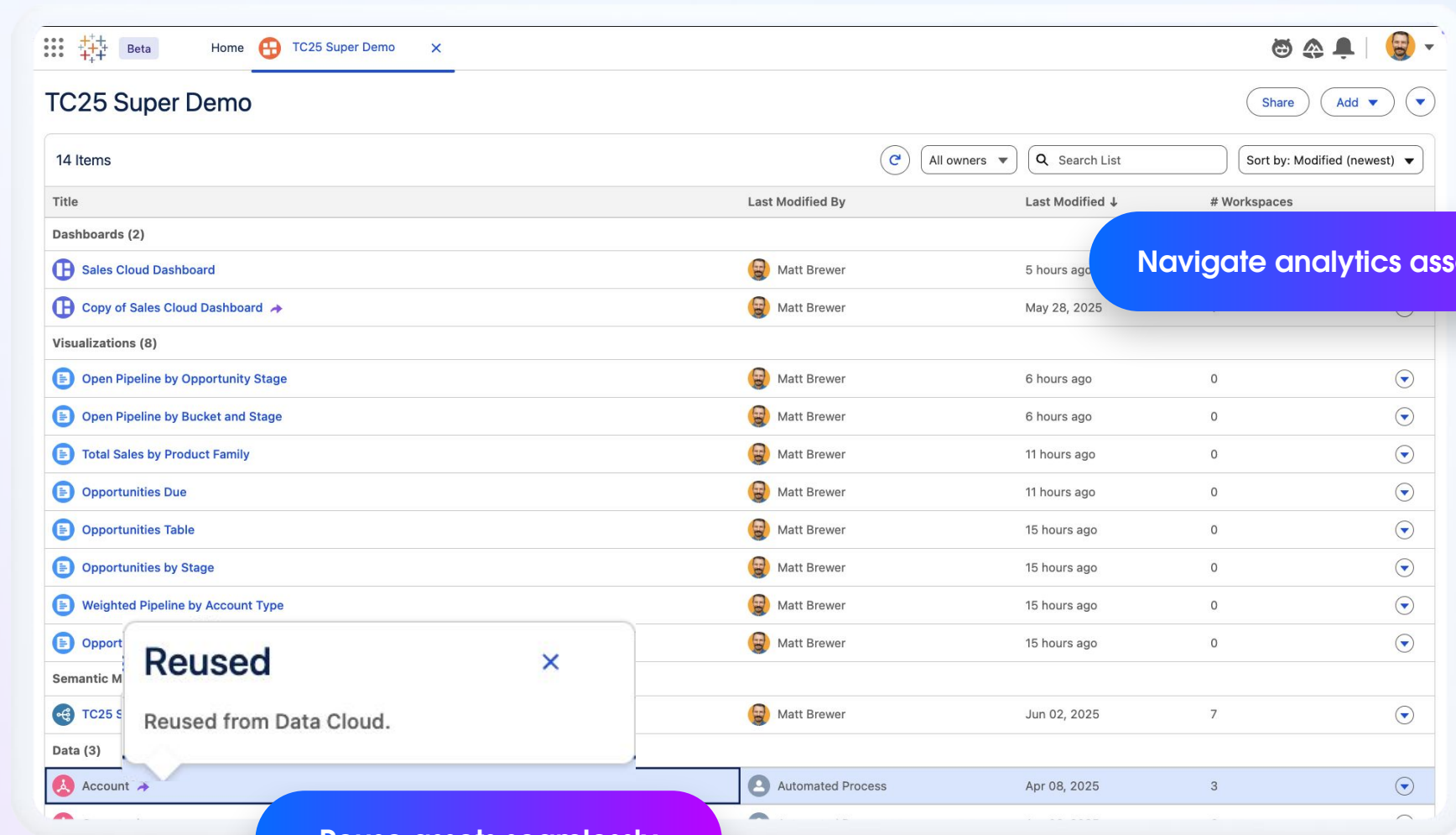
Sales 6/1/2023 - 6/22/2023	52.5K -41.5%
Revenue 6/1/2021 - 6/22/2023	1.4M +53.8%
Units Sold 6/1/2023 - 6/22/2023	1.1K -30.4%
Units Sold All West	12.3K

How can I help? 🗣️

Home Analytics Chatter Tableau Menu

Workspace

Centralized hub for collaborative building



The screenshot shows the Tableau Workspace interface for a workspace named "TC25 Super Demo". The interface includes a navigation bar with "Home" and "TC25 Super Demo" tabs, and a user profile in the top right. Below the workspace name, there are "Share" and "Add" buttons. A list of 14 items is displayed, categorized into Dashboards (2), Visualizations (8), and Data (3). The list includes items like "Sales Cloud Dashboard", "Open Pipeline by Opportunity Stage", and "Account". A tooltip for the "Account" item indicates it was "Reused from Data Cloud.".

Title	Last Modified By	Last Modified ↓	# Workspaces
Dashboards (2)			
Sales Cloud Dashboard	Matt Brewer	5 hours ago	
Copy of Sales Cloud Dashboard →	Matt Brewer	May 28, 2025	
Visualizations (8)			
Open Pipeline by Opportunity Stage	Matt Brewer	6 hours ago	0
Open Pipeline by Bucket and Stage	Matt Brewer	6 hours ago	0
Total Sales by Product Family	Matt Brewer	11 hours ago	0
Opportunities Due	Matt Brewer	11 hours ago	0
Opportunities Table	Matt Brewer	15 hours ago	0
Opportunities by Stage	Matt Brewer	15 hours ago	0
Weighted Pipeline by Account Type	Matt Brewer	15 hours ago	0
Opport	Matt Brewer	15 hours ago	0
Semantic M			
TC25 S			
Data (3)			
Account →			
Automated Process		Apr 08, 2025	3

Navigate analytics assets intuitively

Reuse assets seamlessly

Tableau Next

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Action Layer

Take action with built-in enterprise workflows

Navigate to a URL

← Add Action

Action
 Navigate to

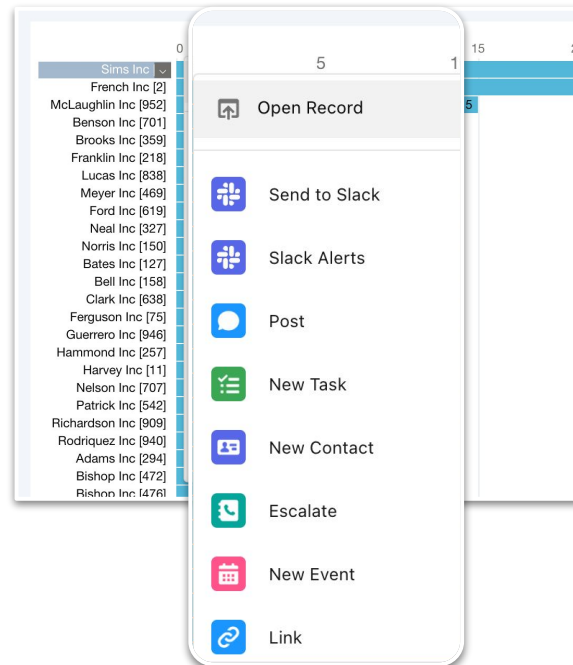
* Field
 Person Name

Destination
 URL

* URL Address
<https://www.linkedin.com/search/results/all/?keywords= Person Name>

* Action Label
 Open LinkedIn Profile

Make Salesforce Record Action



5

Open Record

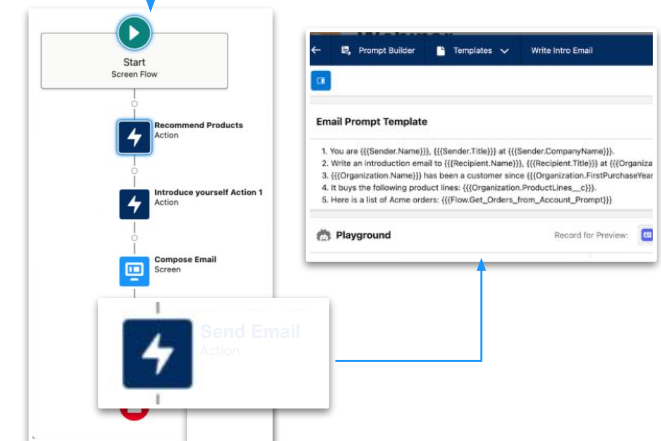
- Send to Slack
- Slack Alerts
- Post
- New Task
- New Contact
- Escalate
- New Event
- Link

Trigger a Flow

Performance Hot Leads

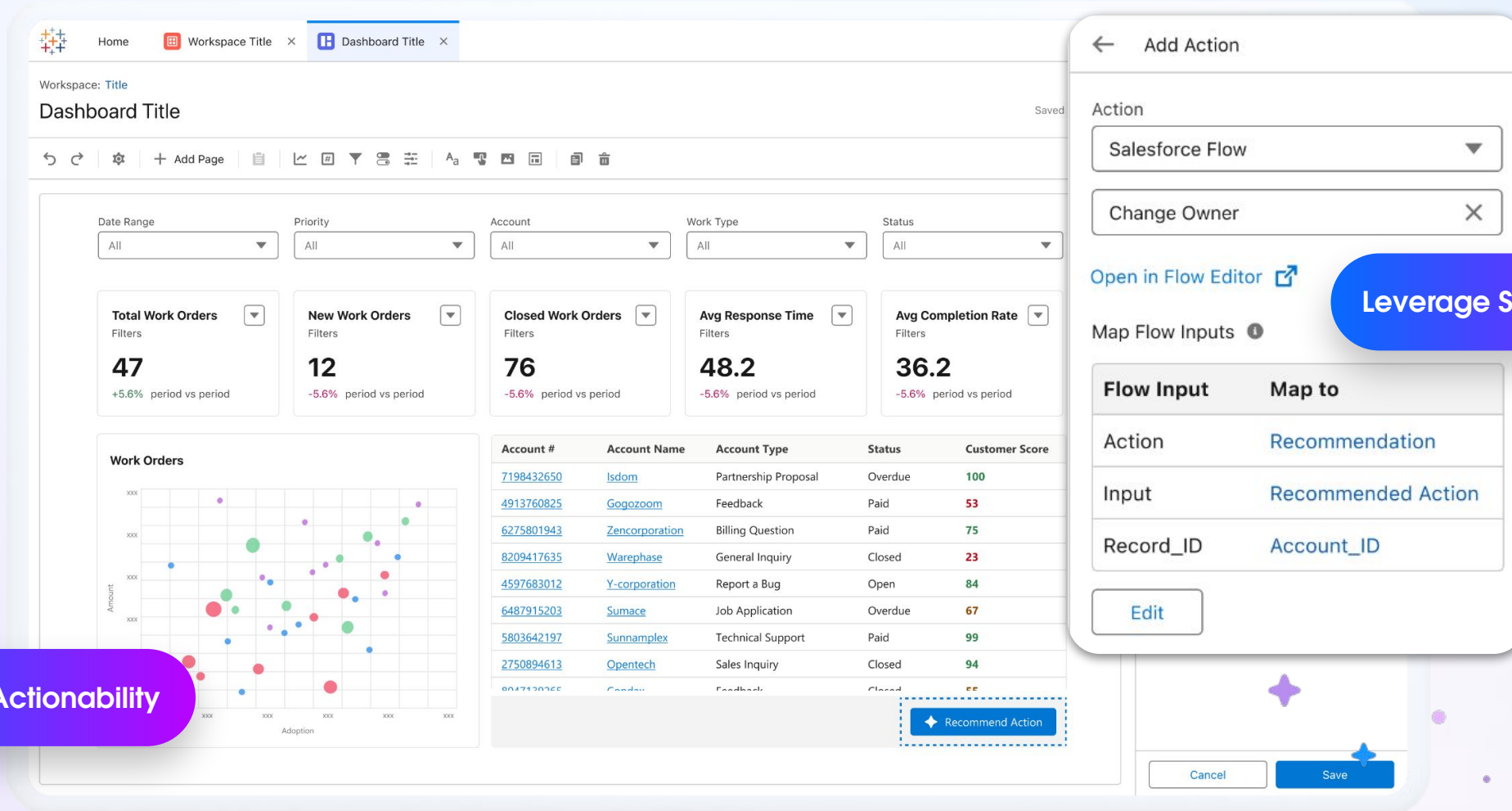
Lead	Status	Priority	Score	Account Value
<input checked="" type="checkbox"/> Kate Sanchez	Service Completed	III (Medium)	99	\$790,240
<input checked="" type="checkbox"/> Tobias Funke	Call back Later	III (Low)	99	\$833,100
<input type="checkbox"/> Jane Cooper	Not Interested	I (High)	98	

Send Email



Action Layer

Turn insights into action



The screenshot shows a Tableau dashboard titled 'Dashboard Title' with several filters and KPI cards. The KPI cards display metrics like 'Total Work Orders' (47), 'New Work Orders' (12), 'Closed Work Orders' (76), 'Avg Response Time' (48.2), and 'Avg Completion Rate' (36.2). Below the KPIs is a scatter plot titled 'Work Orders' and a table of work order details. A 'Recommend Action' button is visible at the bottom right of the table. An 'Add Action' modal is open on the right, showing the configuration for a 'Salesforce Flow' action, specifically the 'Change Owner' action. The modal includes a 'Map Flow Inputs' section and 'Edit', 'Cancel', and 'Save' buttons.

Work Orders Table:

Account #	Account Name	Account Type	Status	Customer Score
7198432650	Isdom	Partnership Proposal	Overdue	100
4913760825	Gogozoom	Feedback	Paid	53
6275801943	Zencorporation	Billing Question	Paid	75
8209417635	Warephase	General Inquiry	Closed	23
4597683012	Y-corporation	Report a Bug	Open	84
6487915203	Sumace	Job Application	Overdue	67
5803642197	Sunnamplex	Technical Support	Paid	99
2750894613	Opentech	Sales Inquiry	Closed	94
804730265	Geddy	Feedback	Closed	55

Add Action Modal Configuration:

- Action: Salesforce Flow
- Change Owner
- Open in Flow Editor
- Map Flow Inputs:

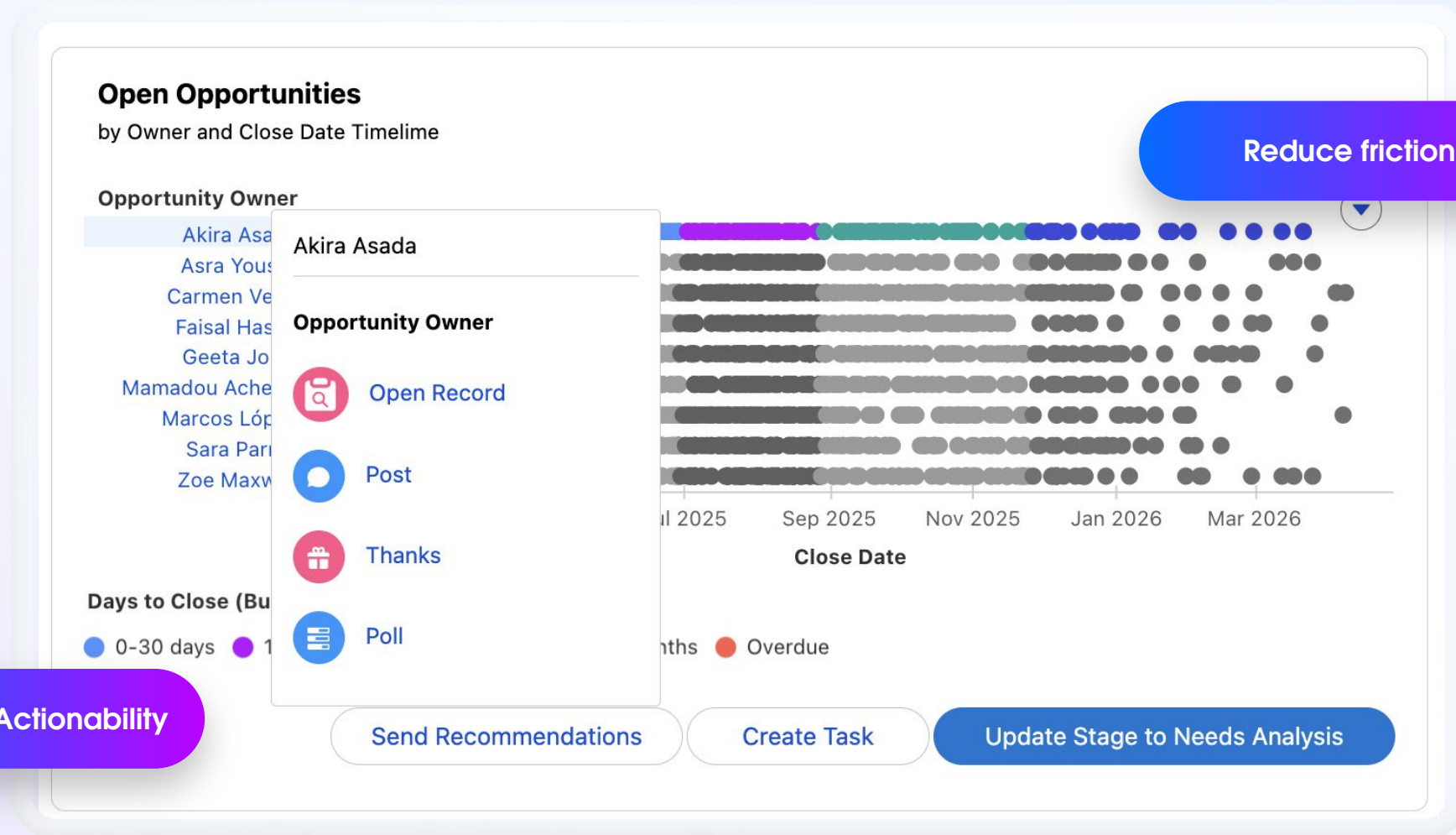
Flow Input	Map to
Action	Recommendation
Input	Recommended Action
Record_ID	Account_ID

Leverage Salesforce Flow

Integrate Actionability

Action Layer

Make a Salesforce record action



Integrate Actionability

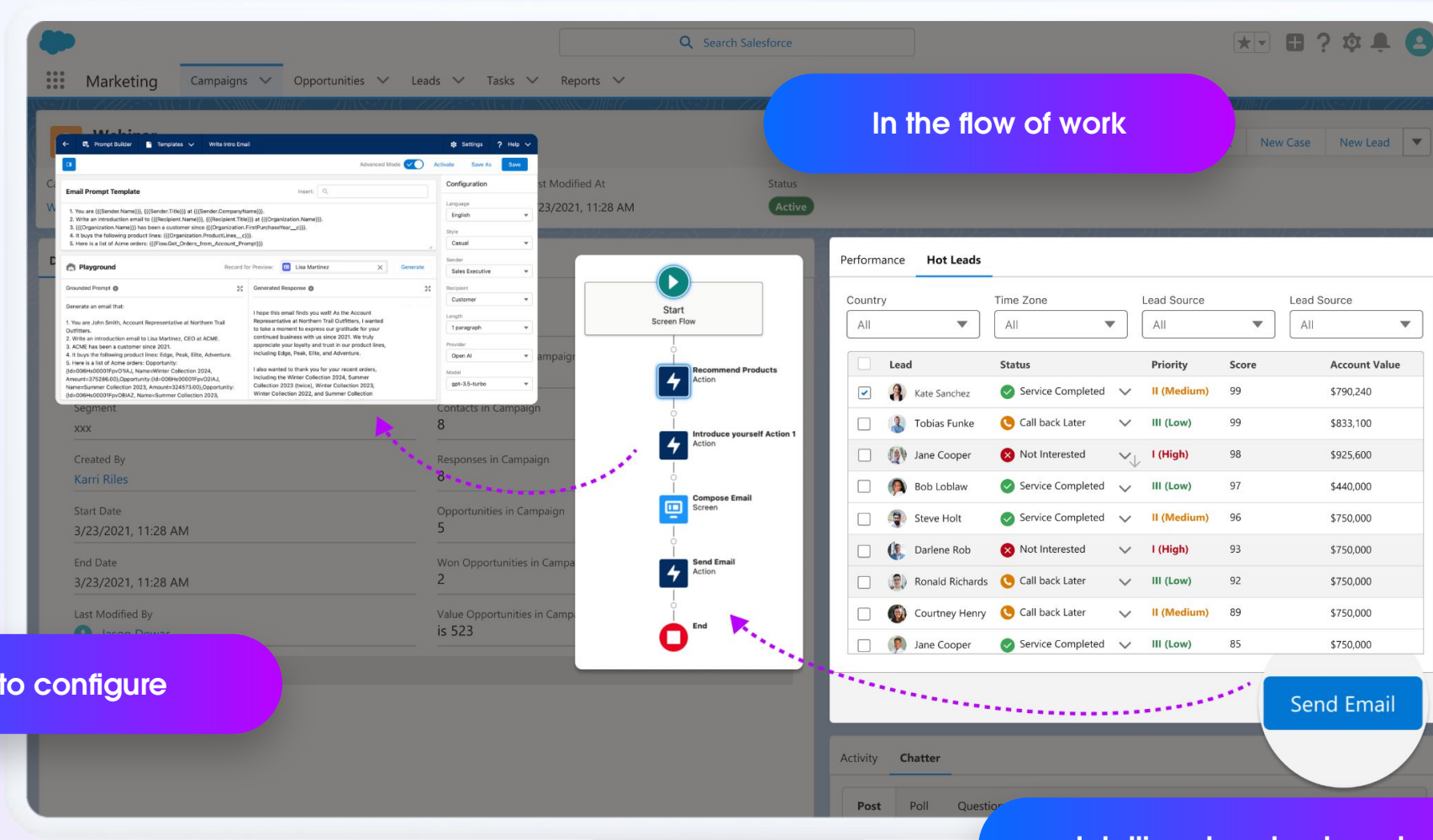
Reduce friction

Send Recommendations

Create Task

Update Stage to Needs Analysis

Action Layer Trigger a flow



The screenshot displays the Salesforce interface with several key components:

- Flow Configuration:** A central flow diagram showing a sequence of steps: Start Screen Flow, Recommend Products Action, Introduce yourself Action 1 Action, Compose Email Screen, Send Email Action, and End.
- Prompt Builder:** A window titled "Write Intro Email" showing a "Grounded Prompt" and a "Generated Response". The prompt includes instructions for writing an introduction email, and the response is a personalized message.
- Lead List:** A table titled "Hot Leads" with columns for Country, Time Zone, Lead Source, Status, Priority, Score, and Account Value. The table contains 10 rows of lead data.

In the flow of work

Easy to configure

Send Email

Intelligent and automated

Tableau Next

The world's first agentic analytics platform

Agentforce Tableau



Action Layer

Visualization Layer

Semantic Layer

Data Layer

Tableau Marketplace



Private

Share, reuse,
and extend
assets



Public

Distribute and
monetize
solutions

Apps for Salesforce



Built on the Agentforce 360 Platform

Agentforce Tableau takes you from data to insights faster



Concierge

Enable trusted
Q&A



Inspector

Deliver proactive
insights



Data Pro

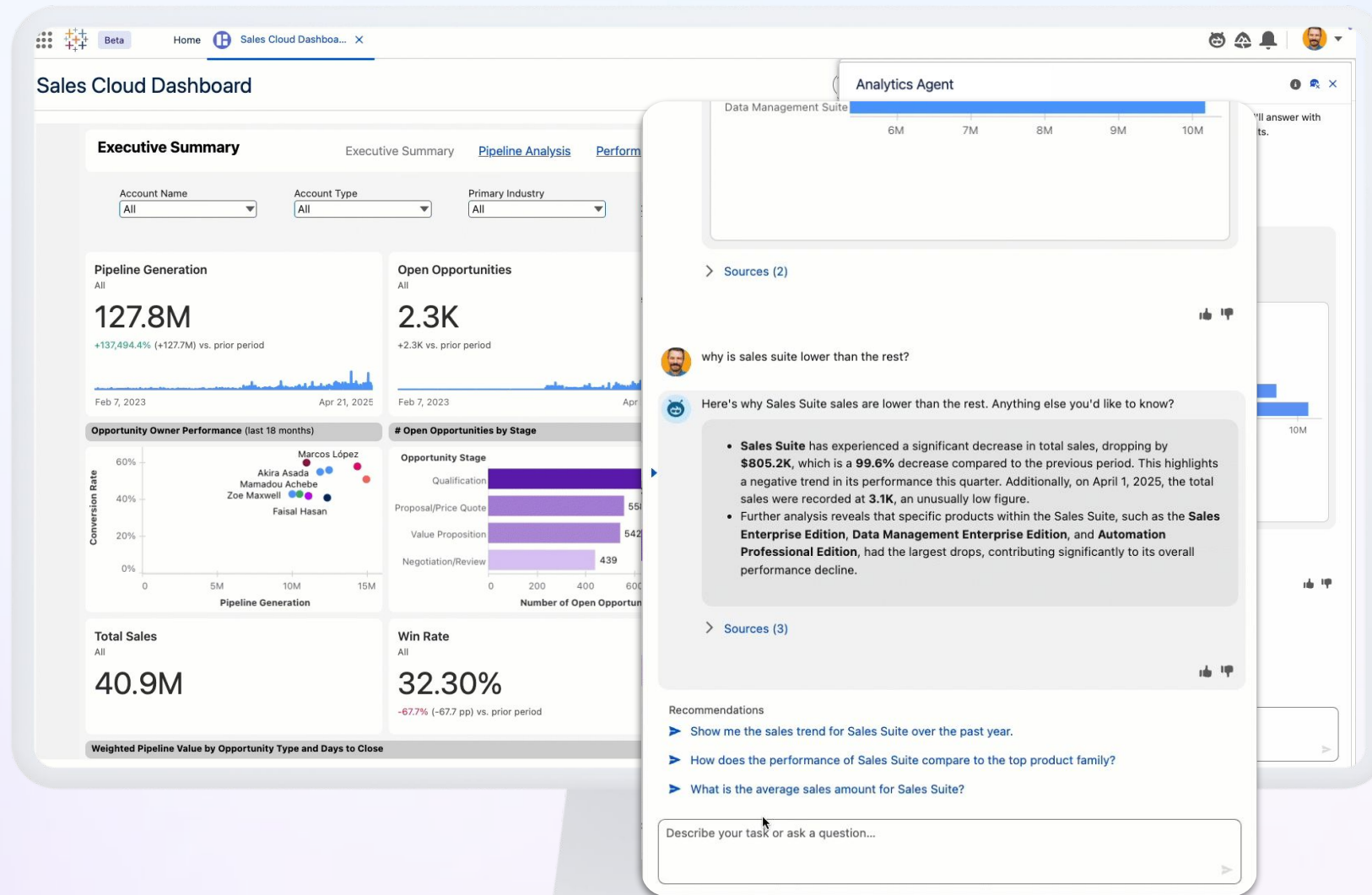
Prepare, model,
& visualize data

Business Users

Analysts

Agentforce Tableau: Concierge

Get trusted answers with conversational analytics



The image shows a Tableau Sales Cloud Dashboard with an Analytics Agent chat window overlaid on the right side. The dashboard displays various sales metrics and charts, while the chat window provides a conversational interface for asking questions and receiving data-driven answers.

Sales Cloud Dashboard

Executive Summary

Account Name: All | Account Type: All | Primary Industry: All

Pipeline Generation
 All: 127.8M
 +137,494.4% (+127.7M) vs. prior period

Open Opportunities
 All: 2.3K
 +2.3K vs. prior period

Opportunity Owner Performance (last 18 months)

Owner	Conversion Rate	Pipeline Generation
Marcos López	~55%	~12M
Akira Asada	~45%	~10M
Mamadou Achebe	~40%	~8M
Zoe Maxwell	~35%	~6M
Faisal Hasan	~25%	~4M

Open Opportunities by Stage

Opportunity Stage	Number of Open Opportunities
Qualification	~550
Proposal/Price Quote	550
Value Proposition	542
Negotiation/Review	439

Total Sales
 All: 40.9M

Win Rate
 All: 32.30%
 -67.7% (-67.7 pp) vs. prior period

Analytics Agent

why is sales suite lower than the rest?

Here's why Sales Suite sales are lower than the rest. Anything else you'd like to know?

- Sales Suite has experienced a significant decrease in total sales, dropping by **\$805.2K**, which is a **99.6%** decrease compared to the previous period. This highlights a negative trend in its performance this quarter. Additionally, on April 1, 2025, the total sales were recorded at **3.1K**, an unusually low figure.
- Further analysis reveals that specific products within the Sales Suite, such as the **Sales Enterprise Edition**, **Data Management Enterprise Edition**, and **Automation Professional Edition**, had the largest drops, contributing significantly to its overall performance decline.

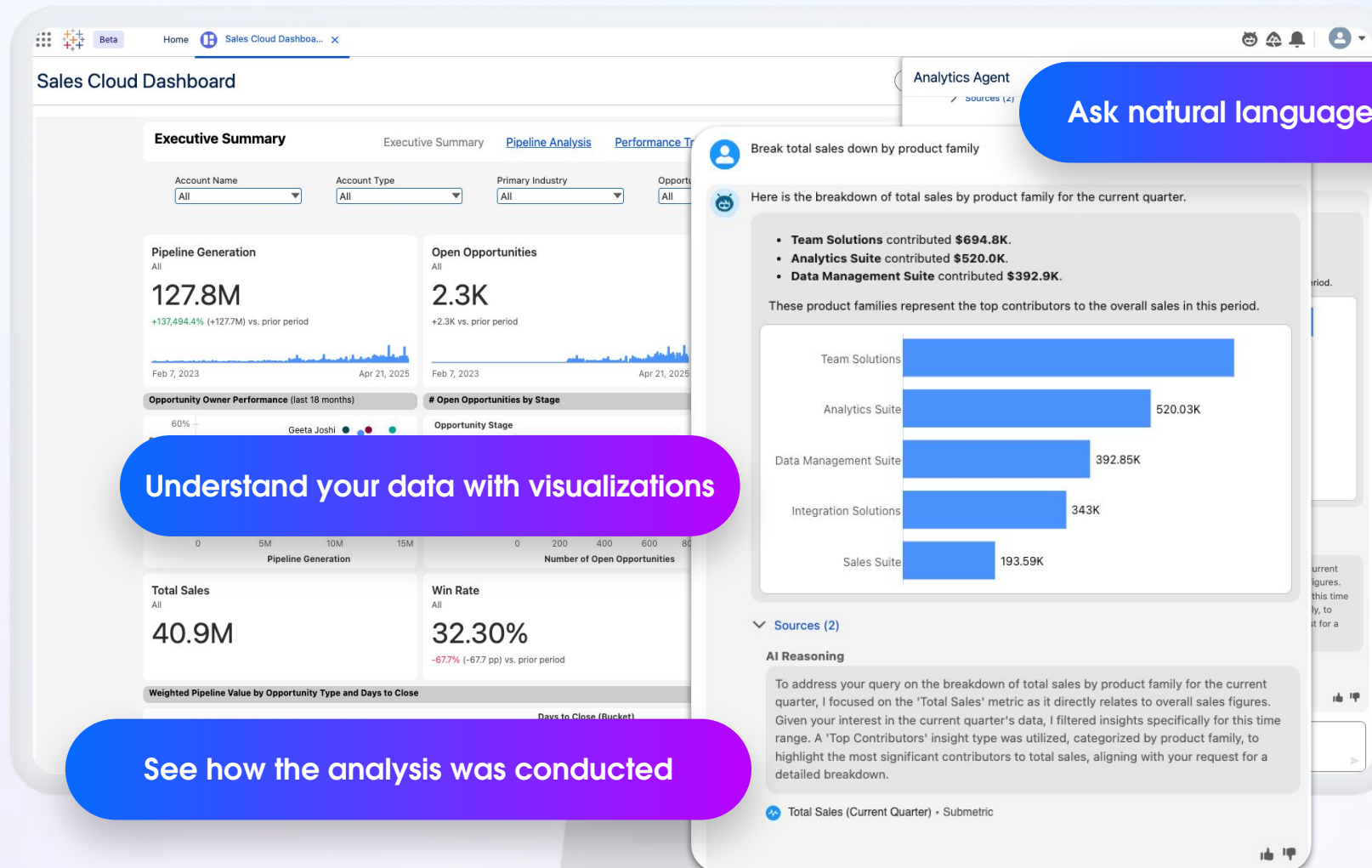
Recommendations

- ▶ Show me the sales trend for Sales Suite over the past year.
- ▶ How does the performance of Sales Suite compare to the top product family?
- ▶ What is the average sales amount for Sales Suite?

Describe your task or ask a question...

Agentforce Tableau: Concierge

Ask questions, get insights and visualizations



The image shows a Tableau Sales Cloud Dashboard with an AI agent chat window overlaid on the right. The dashboard displays various metrics and visualizations, while the chat window shows a user query and the AI's response with a bar chart and reasoning.

Ask natural language questions

Break total sales down by product family

Here is the breakdown of total sales by product family for the current quarter.

- **Team Solutions** contributed **\$694.8K**.
- **Analytics Suite** contributed **\$520.0K**.
- **Data Management Suite** contributed **\$392.9K**.

These product families represent the top contributors to the overall sales in this period.

Product Family	Contribution
Team Solutions	\$694.8K
Analytics Suite	\$520.0K
Data Management Suite	\$392.85K
Integration Solutions	\$343K
Sales Suite	\$193.59K

▼ Sources (2)

AI Reasoning

To address your query on the breakdown of total sales by product family for the current quarter, I focused on the 'Total Sales' metric as it directly relates to overall sales figures. Given your interest in the current quarter's data, I filtered insights specifically for this time range. A 'Top Contributors' insight type was utilized, categorized by product family, to highlight the most significant contributors to total sales, aligning with your request for a detailed breakdown.

👍 🗨

🔍 Total Sales (Current Quarter) - Submetric

Understand your data with visualizations

See how the analysis was conducted

Executive Summary

Account Name: All | Account Type: All | Primary Industry: All | Opportunity Type: All

Pipeline Generation
 All: 127.8M
 +137,494.4% (+127.7M) vs. prior period
 Feb 7, 2023 - Apr 21, 2025

Open Opportunities
 All: 2.3K
 +2.3K vs. prior period
 Feb 7, 2023 - Apr 21, 2025

Opportunity Owner Performance (last 18 months)
 60% | Geeta Joshi

Open Opportunities by Stage

Total Sales
 All: 40.9M

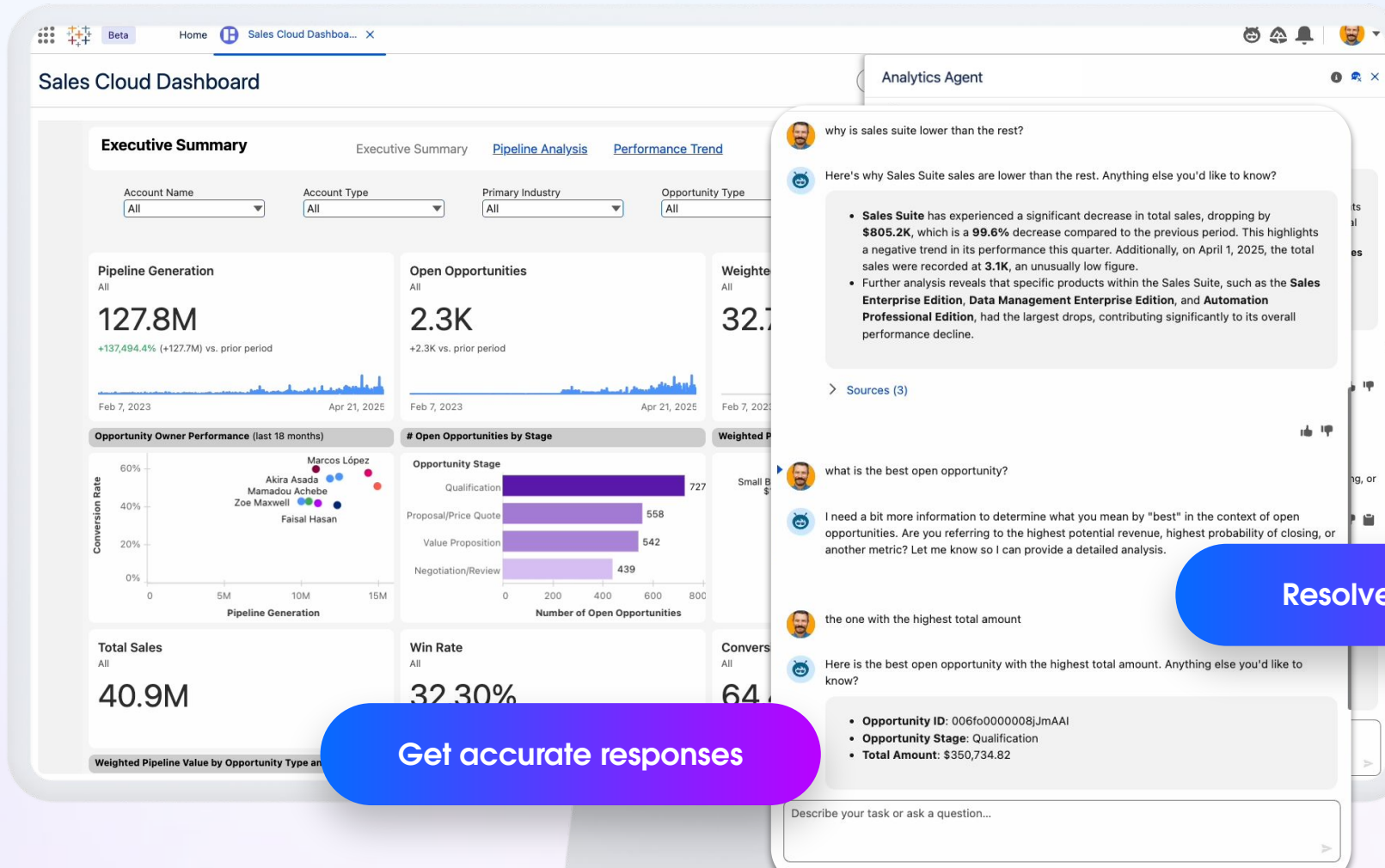
Win Rate
 All: 32.30%
 -67.7% (-67.7 pp) vs. prior period

Weighted Pipeline Value by Opportunity Type and Days to Close

Days to Close (Bucket)

Agentforce Tableau: Concierge

Clarify intent



The screenshot shows the Tableau Sales Cloud Dashboard with an Analytics Agent chat window. The dashboard includes sections for Executive Summary, Pipeline Generation (127.8M), Open Opportunities (2.3K), Opportunity Owner Performance, # Open Opportunities by Stage, Total Sales (40.9M), and Win Rate (32.30%).

The Analytics Agent chat window shows a conversation where a user asks, "why is sales suite lower than the rest?". The agent responds with a detailed analysis of Sales Suite performance, noting a 99.6% decrease in total sales and identifying specific products like Sales Enterprise Edition, Data Management Enterprise Edition, and Automation Professional Edition that contributed to the decline.

Another user question is "what is the best open opportunity?". The agent asks for clarification on the criteria for "best" and then provides a detailed response identifying the top opportunity by total amount.

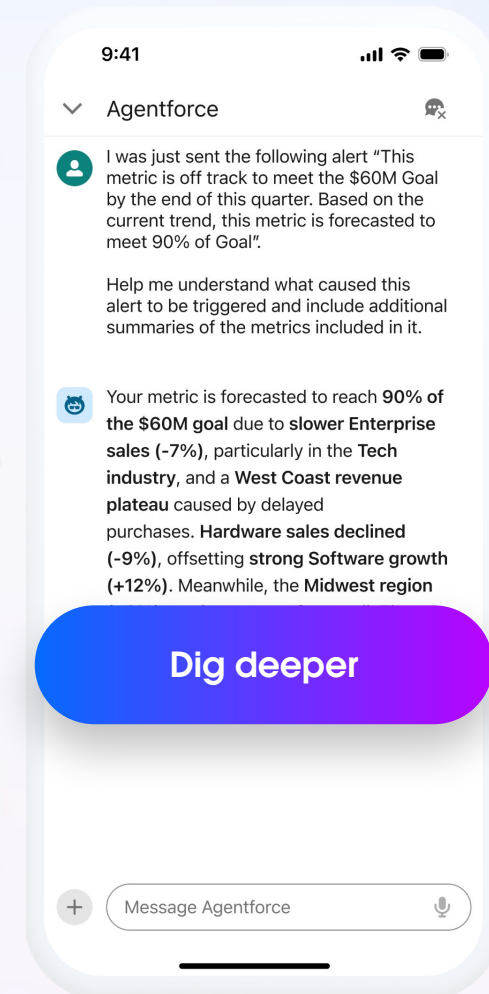
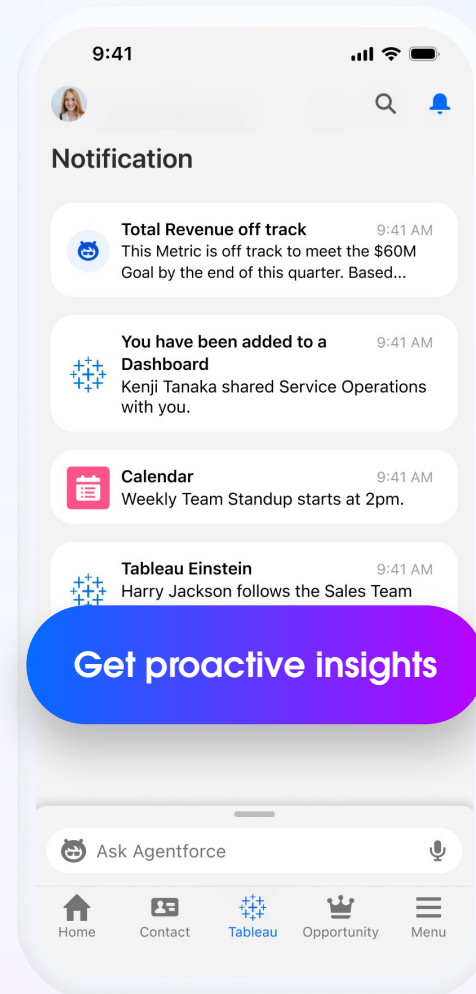
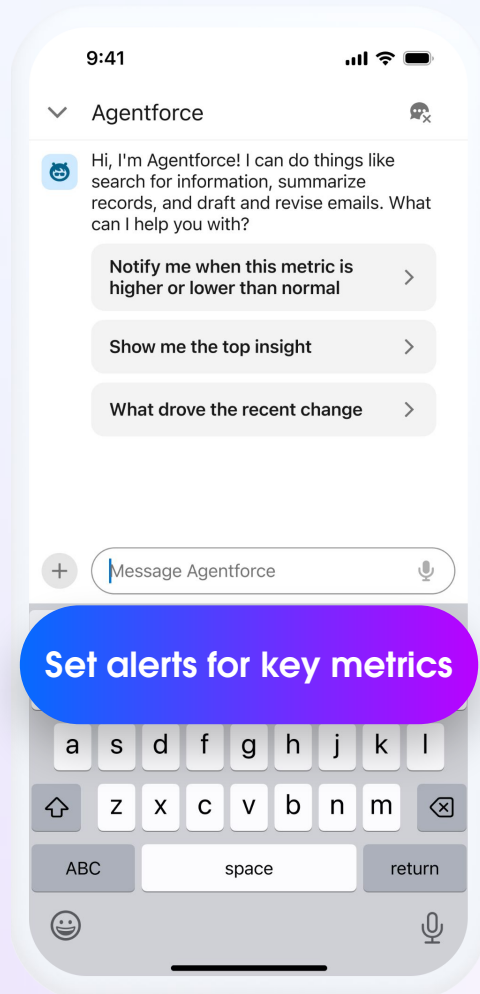
Two callout boxes highlight key features: "Get accurate responses" and "Resolve ambiguities".

Get accurate responses

Resolve ambiguities

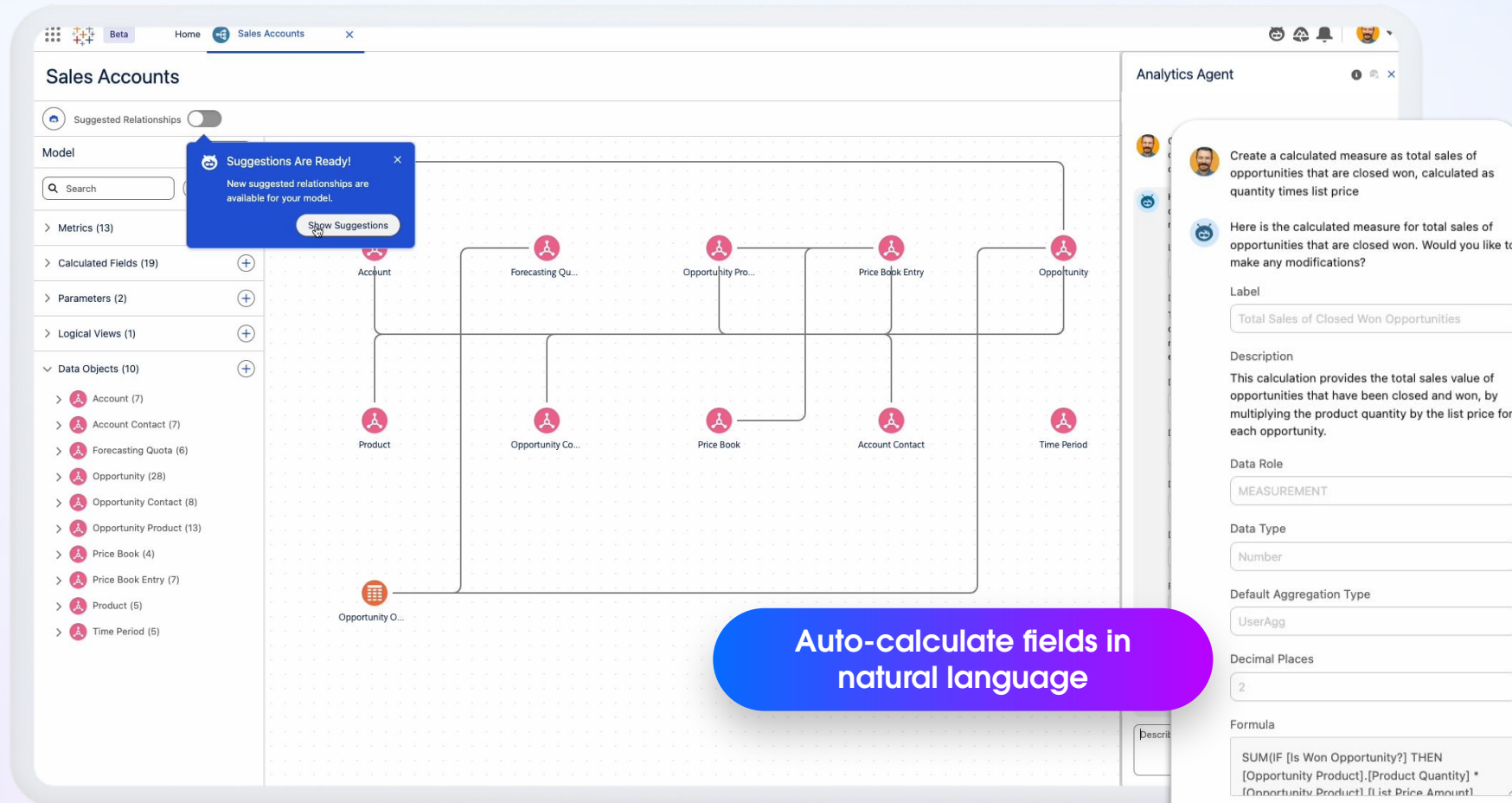
Agentforce Tableau: Inspector

Make smarter decisions with proactive insights



Agentforce Tableau: Data Pro

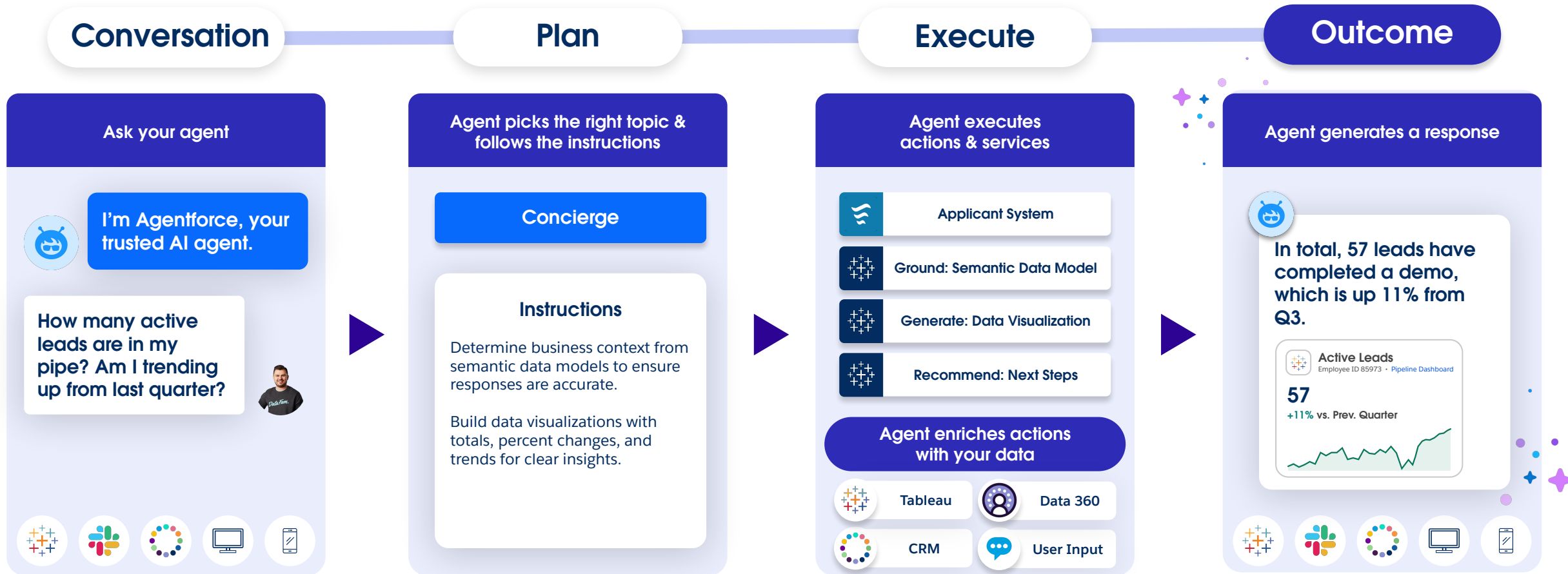
Prepare data and accelerate semantic modeling



The screenshot displays the Tableau interface for a 'Sales Accounts' data model. On the left, a sidebar lists 'Data Objects' including Account (7), Account Contact (7), Forecasting Quota (6), Opportunity (28), Opportunity Contact (8), Opportunity Product (13), Price Book (4), Price Book Entry (7), Product (5), and Time Period (5). The main workspace shows a data model diagram with nodes for Account, Forecasting Quota, Opportunity Product, Price Book Entry, Opportunity, Product, Opportunity Contact, Price Book, Account Contact, and Time Period. A blue notification box says 'Suggestions Are Ready! New suggested relationships are available for your model. Show Suggestions'. On the right, the 'Analytics Agent' interface is open, showing a natural language query: 'Create a calculated measure as total sales of opportunities that are closed won, calculated as quantity times list price'. Below the query, it asks 'Here is the calculated measure for total sales of opportunities that are closed won. Would you like to make any modifications?'. The configuration fields include: Label (Total Sales of Closed Won Opportunities), Description (This calculation provides the total sales value of opportunities that have been closed and won, by multiplying the product quantity by the list price for each opportunity.), Data Role (MEASUREMENT), Data Type (Number), Default Aggregation Type (UserAgg), Decimal Places (2), and Formula (SUM(IF [Is Won Opportunity?] THEN [Opportunity Product].[Product Quantity] * [Opportunity Product].[List Price Amount])). A 'Create' button is at the bottom.

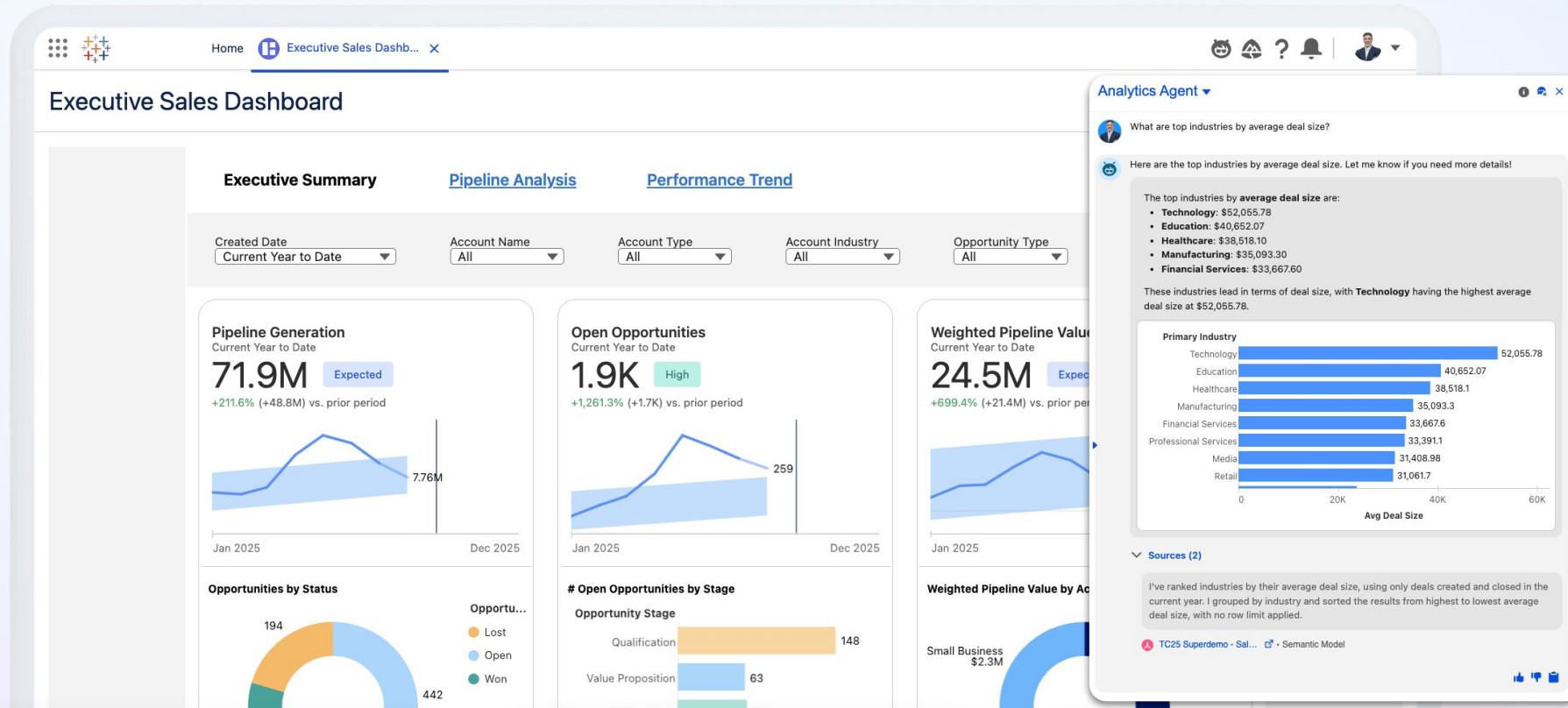
Auto-calculate fields in natural language

How Concierge works



Agentforce Trust Layer

Enrich Sales Agents with Analytics

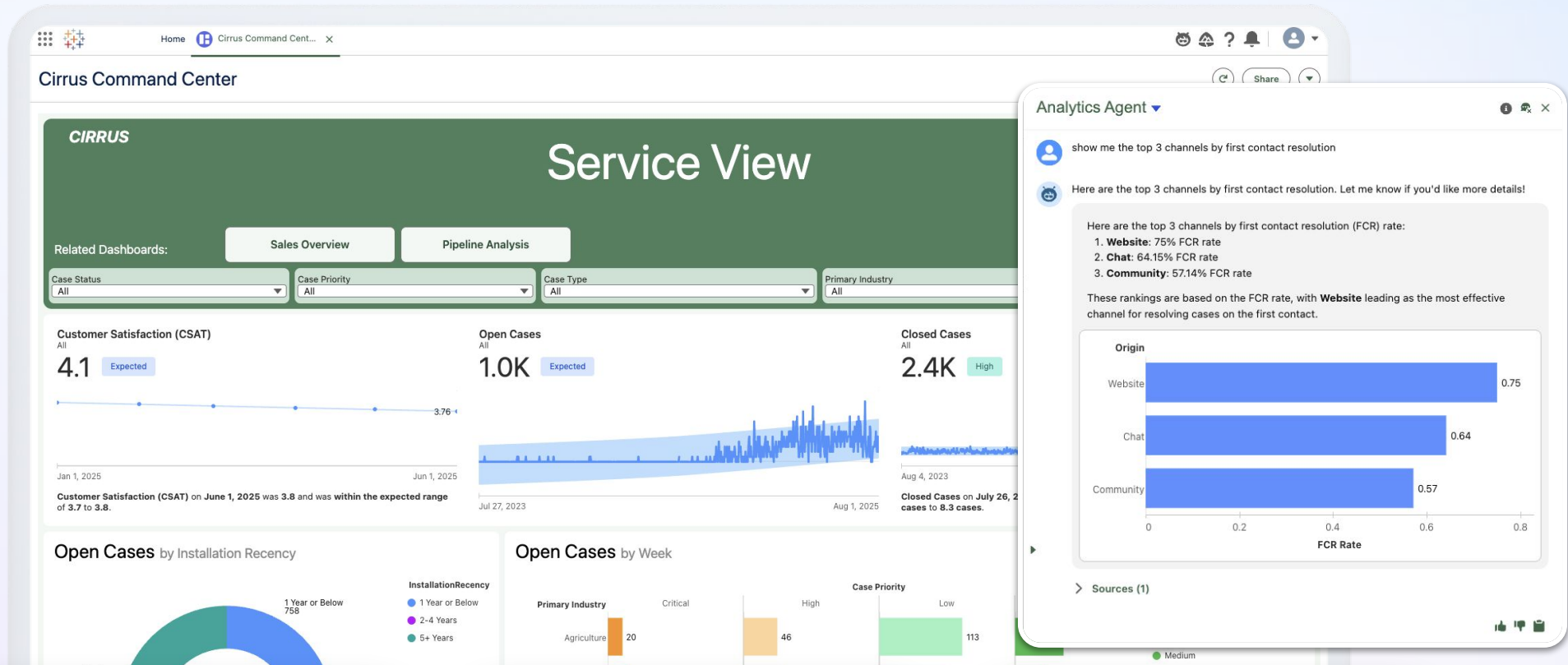


Prioritize top opportunities

Understand rep performance

Identify account whitespace

Enrich Service Agents with Analytics

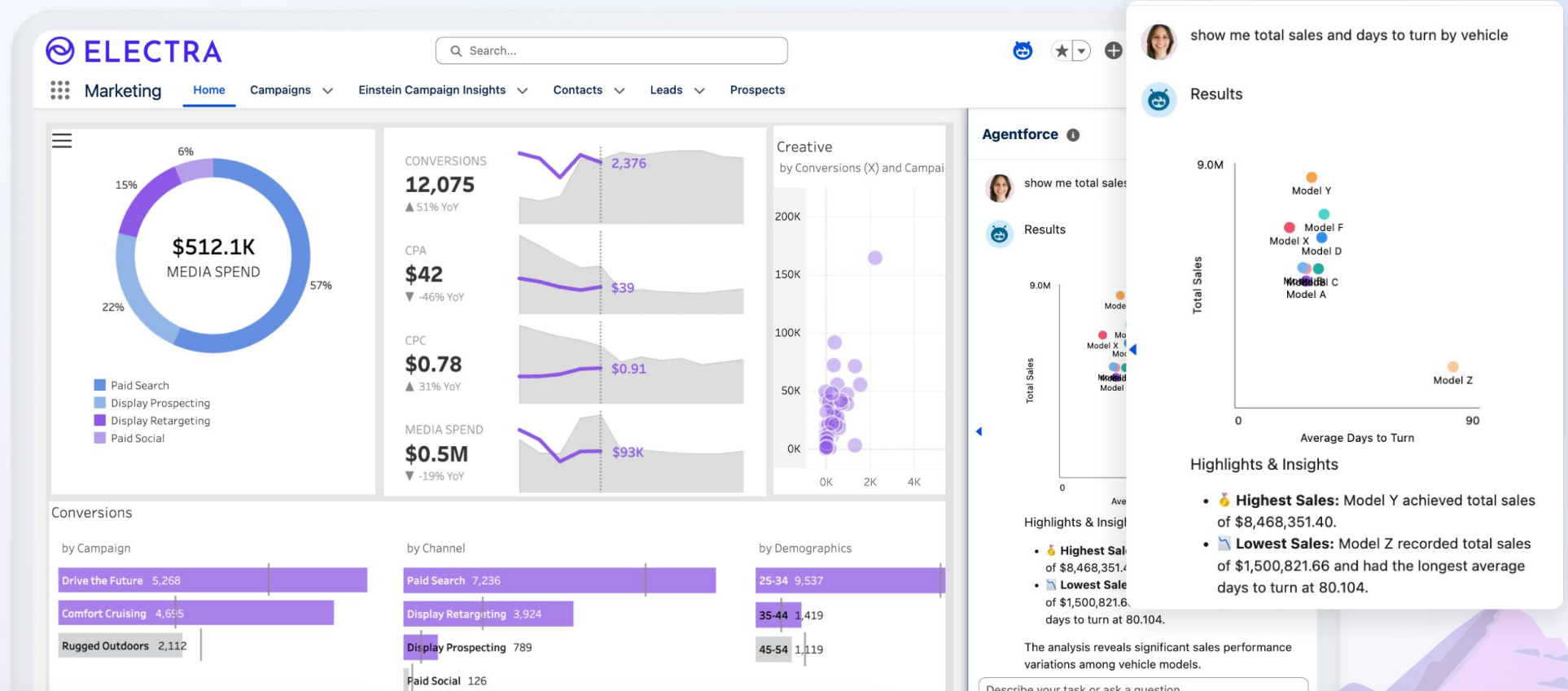


Identify common issues

Track service performance

Understand and improve CSAT

Enrich Marketing Agents with Analytics



Track conversion rates

Identify target segments

Predict customer churn

Tableau Next

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Agentforce Tableau



Action Layer

Visualization Layer

Semantic Layer

Data Layer

Tableau Marketplace



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Share, reuse,
and extend
assets



Public

Distribute and
monetize
solutions

Apps for Salesforce



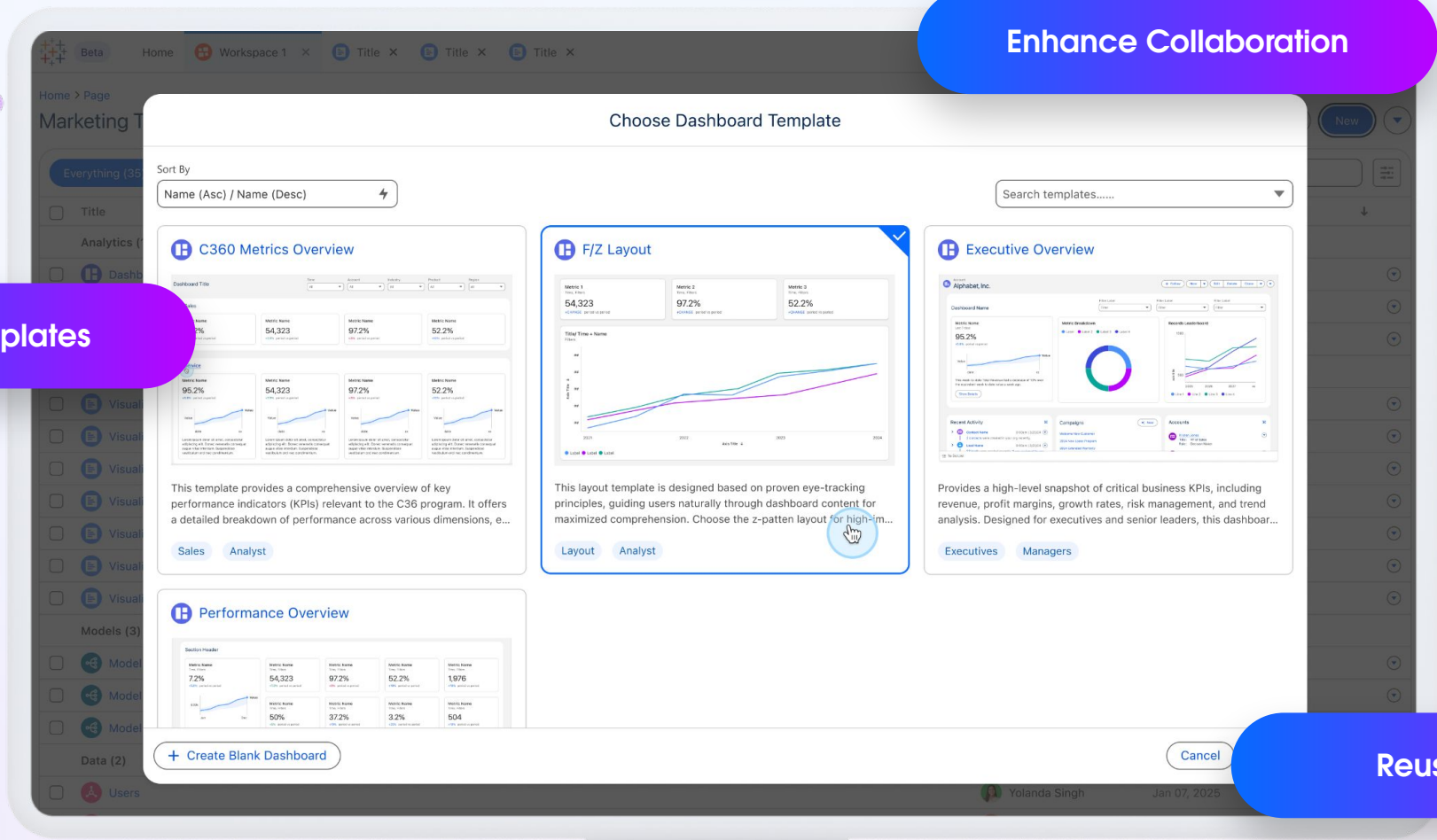
Built on the Agentforce 360 Platform

Marketplace

Create and reuse analytical assets

Create Templates

Enhance Collaboration



Choose Dashboard Template

Sort By: Name (Asc) / Name (Desc)

Search templates.....

C360 Metrics Overview

This template provides a comprehensive overview of key performance indicators (KPIs) relevant to the C36 program. It offers a detailed breakdown of performance across various dimensions, e...

Sales Analyst

F/Z Layout

This layout template is designed based on proven eye-tracking principles, guiding users naturally through dashboard content for maximized comprehension. Choose the z-pattern layout for high-im...

Layout Analyst

Executive Overview

Provides a high-level snapshot of critical business KPIs, including revenue, profit margins, growth rates, risk management, and trend analysis. Designed for executives and senior leaders, this dashboar...

Executives Managers

Performance Overview

+ Create Blank Dashboard

Cancel

Yolanda Singh Jan 07, 2025

Reuse Assets

Tableau Next

The world's first agentic analytics platform

Agentforce Tableau



Action Layer

Visualization Layer

Semantic Layer

Data Layer

Tableau Marketplace



Private

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and extend
assets



Public

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solutions


Apps for Salesforce



Built on the Agentforce 360 Platform

Tableau Next Apps for Salesforce

Accelerate time to insight with purpose-built analytics




Can you show me total sales by product family?

- Team Solutions contributed \$694.8K.
- Analytics Suite contributed \$520.0K.
- Data Management Suite contributed \$392.8K.

These product families represent the top contributors to the overall sales in this period.

Product Family	Contribution
Team Solutions	\$694.8K
Analytics Suite	\$520.0K
Data Management Suite	\$392.8K
Integration Solutions	\$43K
Sales Suite	\$93.5K

**Optimize Pipeline
Expand Deals
Grow Revenue**



Average CSAT

Filter Metric: 6.1

Time Range: All


Agent: All

Value: [Search]

Acme Dispatcher
 Adam Mercer
 Alan Reed
 Alexander Raneri

On June 3, 2025, the last day with available data, Av

**Boost CSAT
Improve Sentiment
Expedite Resolution**



Configure Your Goal

Metric: Clicks

Channel: Meta Ads


Value: 468

1 week left

Dec 08 - Today - Dec 15

The average amount of spends to acquire each new lead through the marketing channels

**Drive Conversion
Track Attribution
Optimize Spend**



Care Agent Analytics

Heads up. Retention Rate is trending negative.

Patient Adherence & Drop out Analysis

Patient Not Responding to Assessment

This Month: 7K

-10% vs. prior month

Number of Patients not Responding has dropped by 10% against last month. 30 Patients have dropped out of enrollment.

**Reduce Patient Churn
Grow Client Portfolios**

Accelerate time to value

with purpose-built
analytics that are
AI-ready

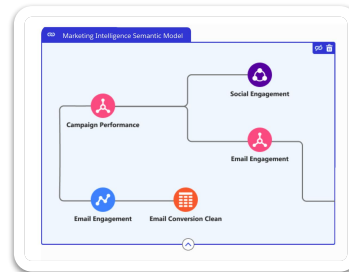
Optimize for your business

with a composable
and extensible
platform

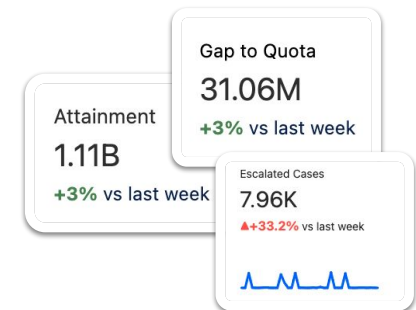


Accelerate time to value with out-of-the box assets

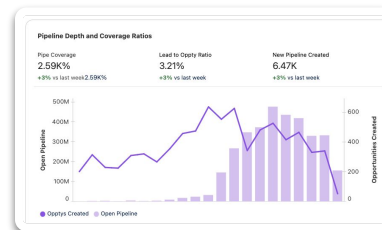
Enrich AI insights with a pre-configured SDM



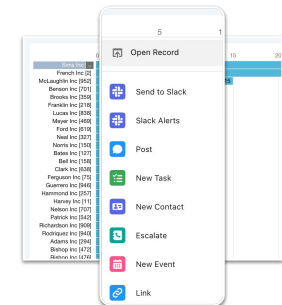
Set and track goals with opinionated metrics



Understand data with pre-built visualizations



Drive outcomes with actions directly on insights

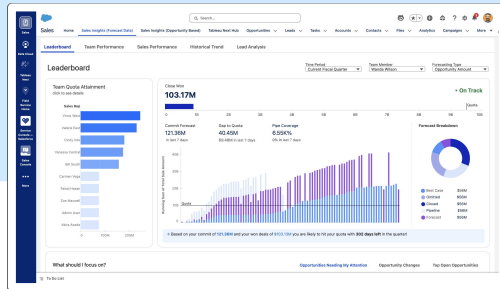


Powered by Tableau Next

Tableau Next Apps for Salesforce Purpose-built analytics across use cases



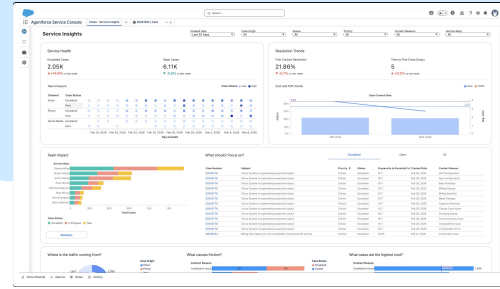
Sales



Get revenue insights, analyze sale stages, spot lead trending and team performance



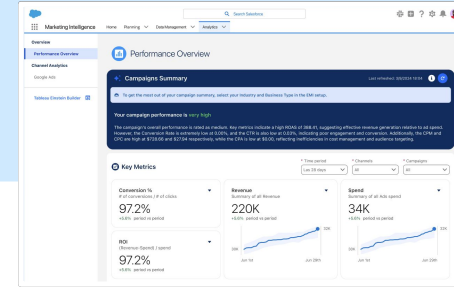
Service



Improve case resolution/CSAT, understand customer sentiment, monitor agents, ITSM



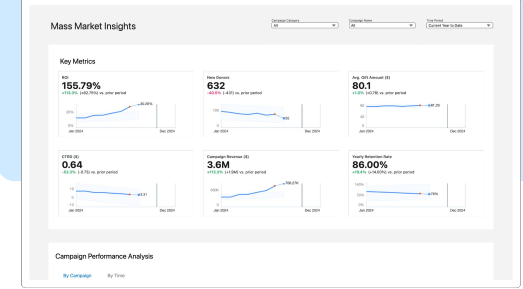
Marketing



Track conversion rates, identify target segments, predict customer churn



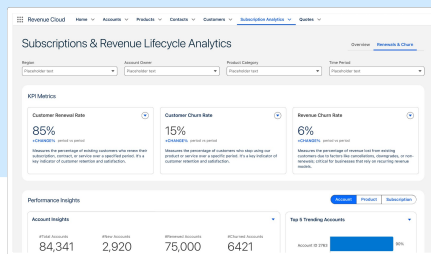
Industries



Life Sciences, Financial Services, MFG, CG



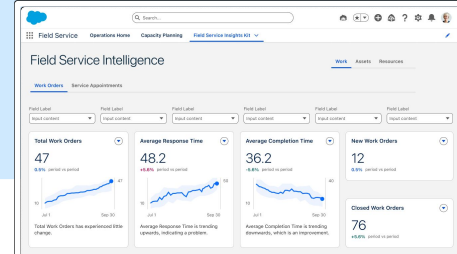
Revenue



Fine-tune pricing, streamline fulfillment and subscriptions, enhance billing visibility



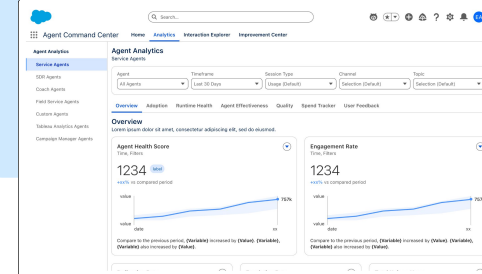
Field Service



Optimize work order resolution, reduce response times, view by territory



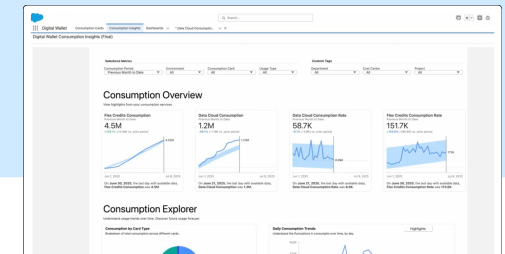
Agentforce



Monitor and optimize agent performance, starting with Service Agent



Data & Integration



Monitor consumption-based products and optimize API performance and response

Tableau Next

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Agentforce Tableau



Action Layer

Visualization Layer

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Apps for Salesforce



Built on the Agentforce 360 Platform

Tableau Next and Slack

Transform productivity with agentic analytics in every conversation

Collaborate on a shared source of truth

Share live, AI-powered metrics and dashboards across Slack channels, DMs, and canvases for smarter decisions

Explore and act on trusted data with agents

Ask Agentforce questions in natural language, get accurate, contextual responses and visualizations

Unlock deeper insights

Jump to Tableau Next directly from Slack for richer data exploration and instant, actionable insights

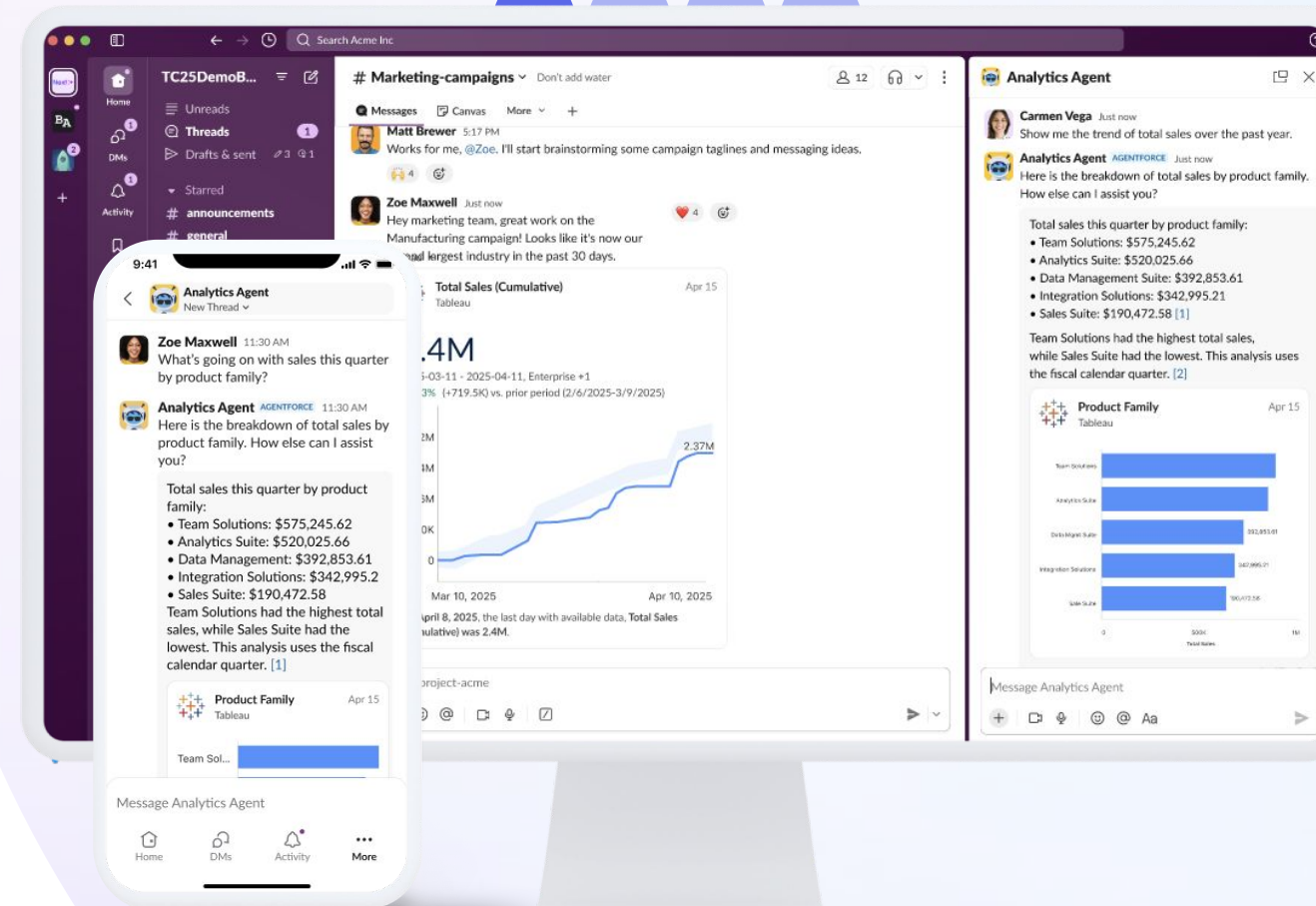


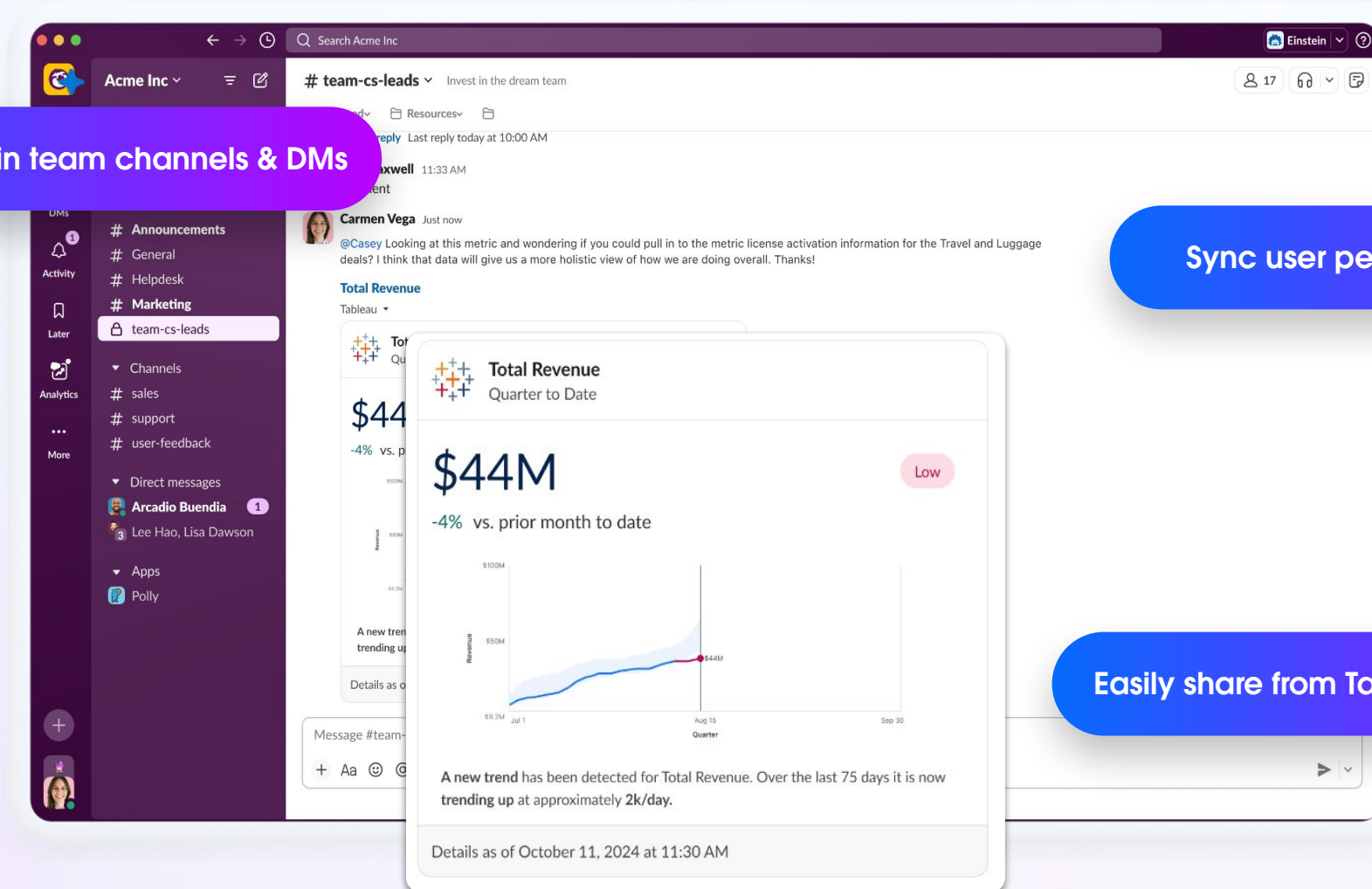
Tableau Next and Slack

Share dashboards and live metrics

Get live analytics in team channels & DMs

Sync user permissions automatically

Easily share from Tableau Next to Slack




The screenshot shows a Slack channel named "# team-cs-leads" with a Tableau dashboard embedded. The dashboard displays "Total Revenue" for the quarter to date, showing a value of \$44M, which is a 4% decrease compared to the prior month. A line chart shows the revenue trend from July 1st to September 30th, with a red dot indicating the current value. A notification banner at the bottom of the dashboard states: "A new trend has been detected for Total Revenue. Over the last 75 days it is now trending up at approximately 2k/day." The dashboard also includes a "Low" status indicator and a timestamp: "Details as of October 11, 2024 at 11:30 AM".

Quarter	Total Revenue	Change vs. Prior Month
Current Quarter	\$44M	-4%

Tableau Next and Slack

Embed live metrics in Slack canvas

Team Metrics Canvas

Edited 4 hours ago  Share

Team Metrics Canvas


We will use this Canvas to monitor the health of our business! It includes a live view of all of our team's metrics, filtered to our team's context. It also includes a related list of our opportunities and tasks, including current status and due dates. Please review this ahead of our monthly team check-in.

Team Metrics & Goals:

Total Sales
Quarter to Date, United States

\$44M Quota Achieved

+4% vs. prior quarter to date



March 15 Apr 31


is above the expected range. in California, Arizona, and New York.

2025 at 5:32 PM

Pipeline Generation
Quarter to Date

\$150M Off Track from Goal

-6% vs. prior quarter to date



Jan 1 March 15 Apr 31


A new trend has been detected for Pipeline Generation. Over the last 75 days it is now **trending up slowly** at approximately 21k/day.

Last refreshed: March 15, 2025 at 5:32 PM

Email Click-Through Rate
Week to Date

4.5% Low

-2.6% vs. prior week



Mar 8 Mar 15

Email click-through rate is trending **below the expected range**. A slight dip this week may require attention.

Last refreshed: March 15, 2025 at 5:32 PM

Sales Team Task List

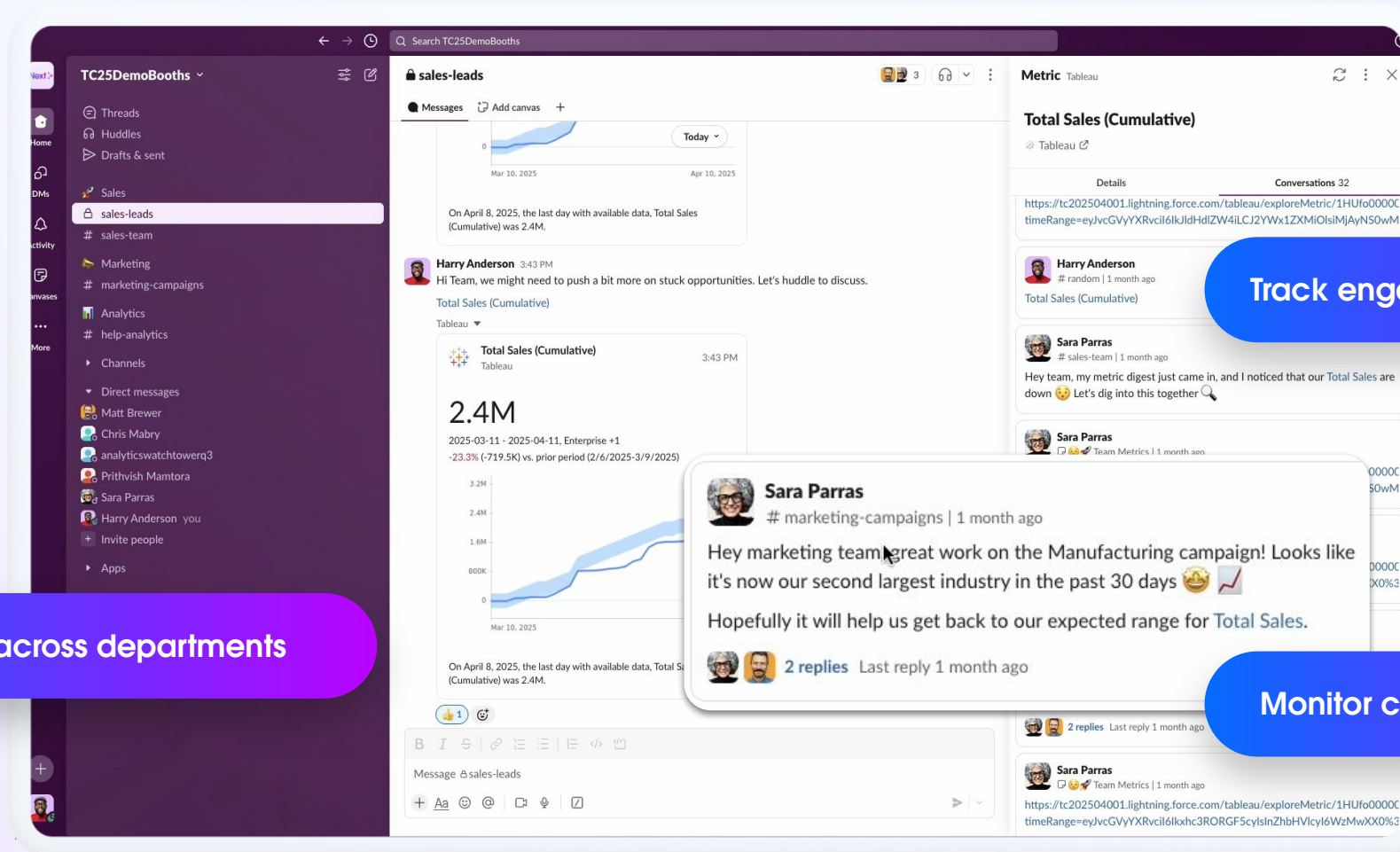
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Collaborate on real-time analytics

Insert live metrics in canvas

Tableau Next and Slack

Browse related threads on analytics



Collaborate across departments

Track engagement with your data

Monitor conversations in real time

Message: #sales-leads

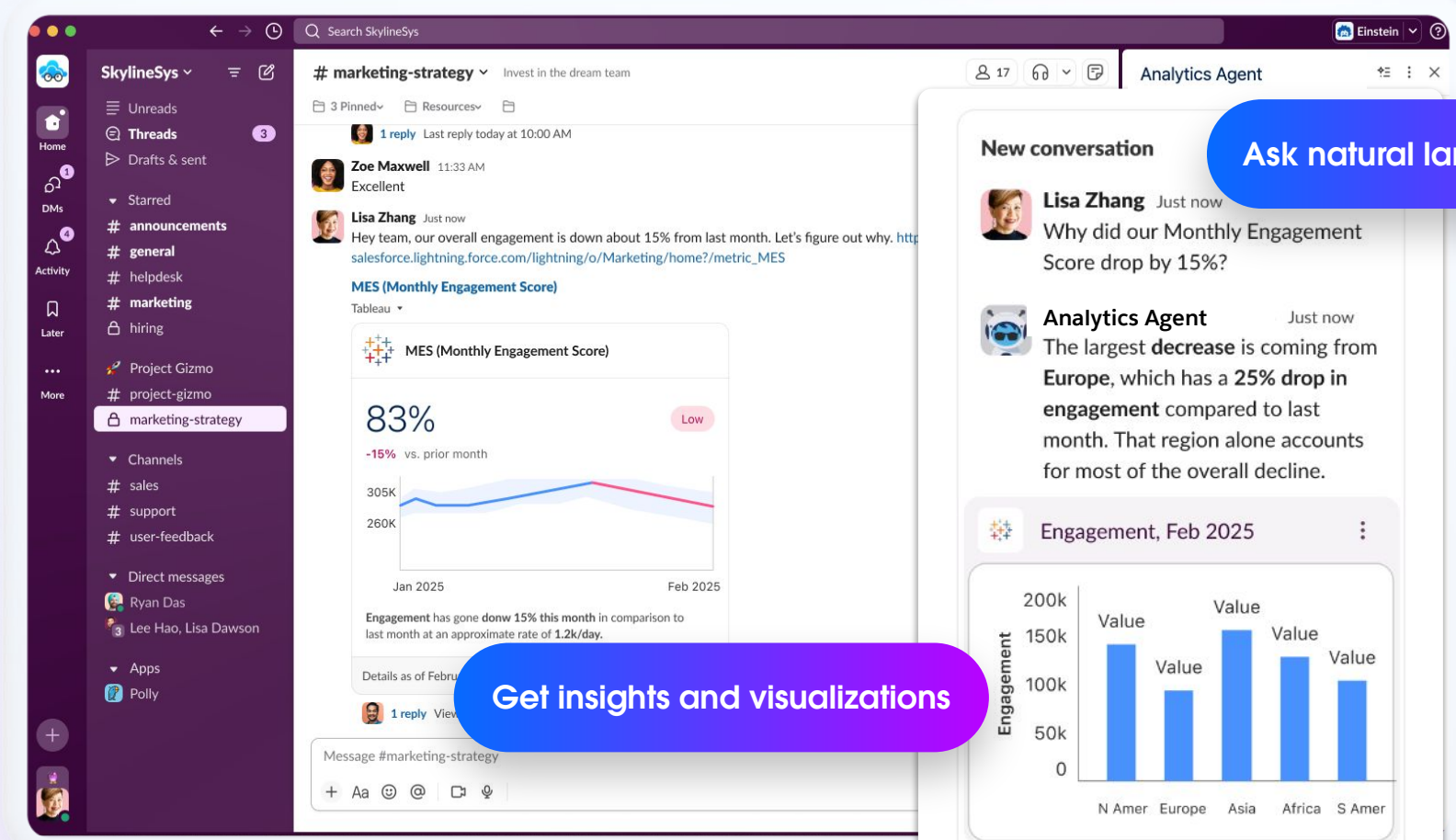
Total Sales (Cumulative)
2.4M
2025-03-11 - 2025-04-11, Enterprise +1
-23.3% (-719.5K) vs. prior period (2/6/2025-3/9/2025)

Sara Parras #marketing-campaigns | 1 month ago
Hey marketing team, great work on the Manufacturing campaign! Looks like it's now our second largest industry in the past 30 days 🎉📈
Hopefully it will help us get back to our expected range for Total Sales.

2 replies Last reply 1 month ago

Tableau Next and Slack

Ask questions about your data



The image shows a Slack interface for the #marketing-strategy channel. A Tableau visualization displays the Monthly Engagement Score (MES) at 83%, which is a 15% decrease from the previous month. The chart shows a downward trend from January 2025 to February 2025. A conversation follows where Lisa Zhang asks, "Why did our Monthly Engagement Score drop by 15%?". The Analytics Agent responds, "The largest decrease is coming from Europe, which has a 25% drop in engagement compared to last month. That region alone accounts for most of the overall decline." Below this, a bar chart titled "Engagement, Feb 2025" shows engagement values for five regions: N Amer, Europe, Asia, Africa, and S Amer.

Get insights and visualizations

Ask natural language questions

New conversation

Lisa Zhang Just now
Why did our Monthly Engagement Score drop by 15%?

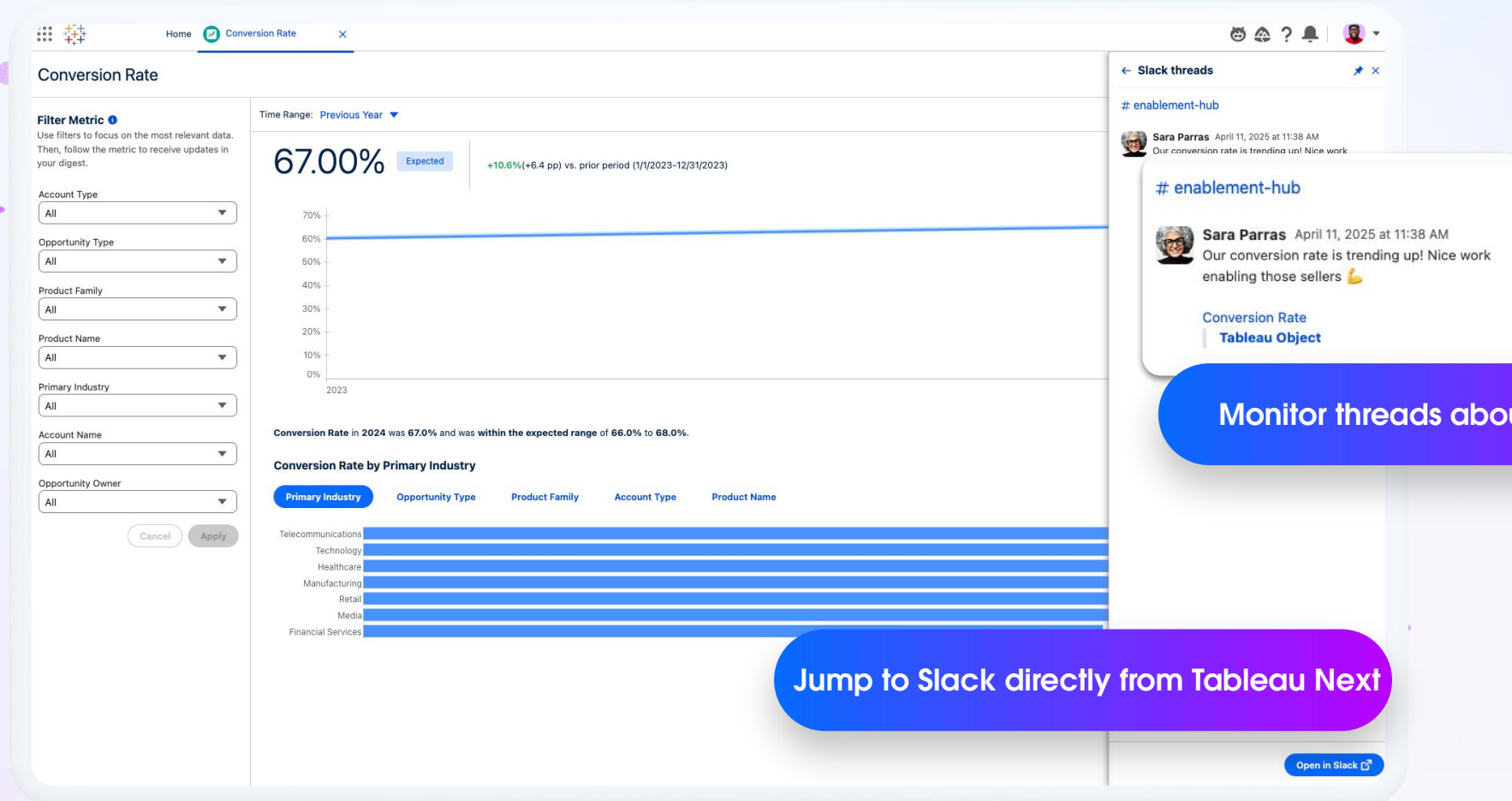
Analytics Agent Just now
The largest decrease is coming from **Europe**, which has a **25% drop in engagement** compared to last month. That region alone accounts for most of the overall decline.

Engagement, Feb 2025

Region	Engagement Value
N Amer	~140k
Europe	~90k
Asia	~160k
Africa	~130k
S Amer	~100k

Tableau Next and Slack

Track Slack conversations in Tableau Next



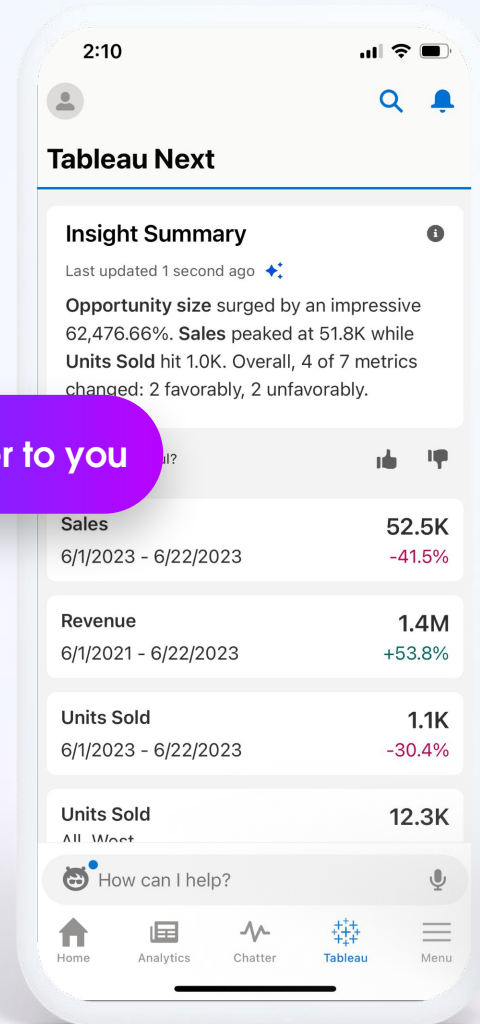
The screenshot displays the Tableau Next interface for a 'Conversion Rate' dashboard. On the left, there are filter menus for Account Type, Opportunity Type, Product Family, Product Name, Primary Industry, Account Name, and Opportunity Owner, all set to 'All'. The main dashboard shows a line chart for 'Conversion Rate' over time, with a current value of 67.00% and a change of +10.6% (+6.4 pp) vs. prior period (1/1/2023-12/31/2023). Below the chart, a text summary states: 'Conversion Rate in 2024 was 67.0% and was within the expected range of 66.0% to 68.0%'. A horizontal bar chart titled 'Conversion Rate by Primary Industry' shows data for Telecommunications, Technology, Healthcare, Manufacturing, Retail, Media, and Financial Services. A Slack thread overlay on the right shows a message from Sara Parras: 'Our conversion rate is trending up! Nice work enabling those sellers 🙌'. Below the message is a 'Tableau Object' link for 'Conversion Rate'. A blue button at the bottom right of the Slack overlay says 'Open in Slack'.

Monitor threads about your data

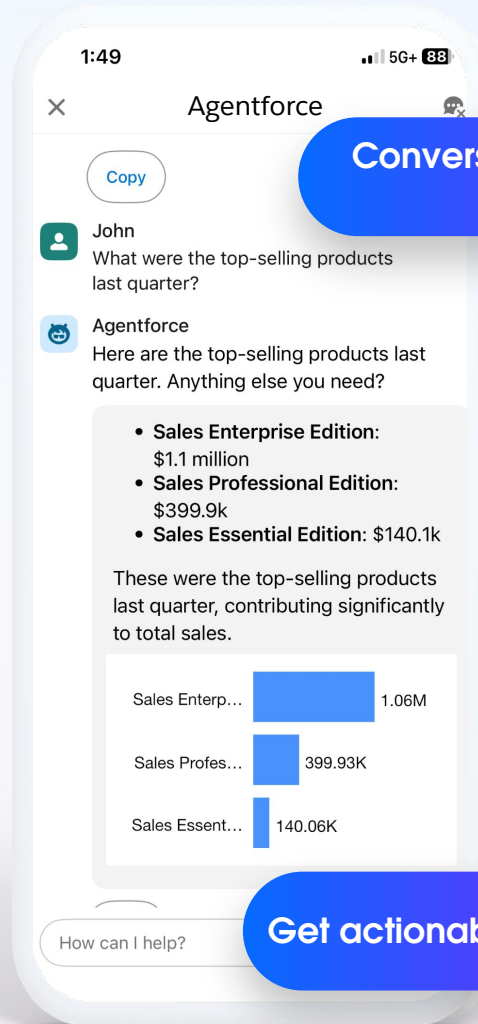
Jump to Slack directly from Tableau Next

Tableau Next on the Salesforce Mobile App

Access agentic analytics, wherever you are



Follow metrics that matter to you

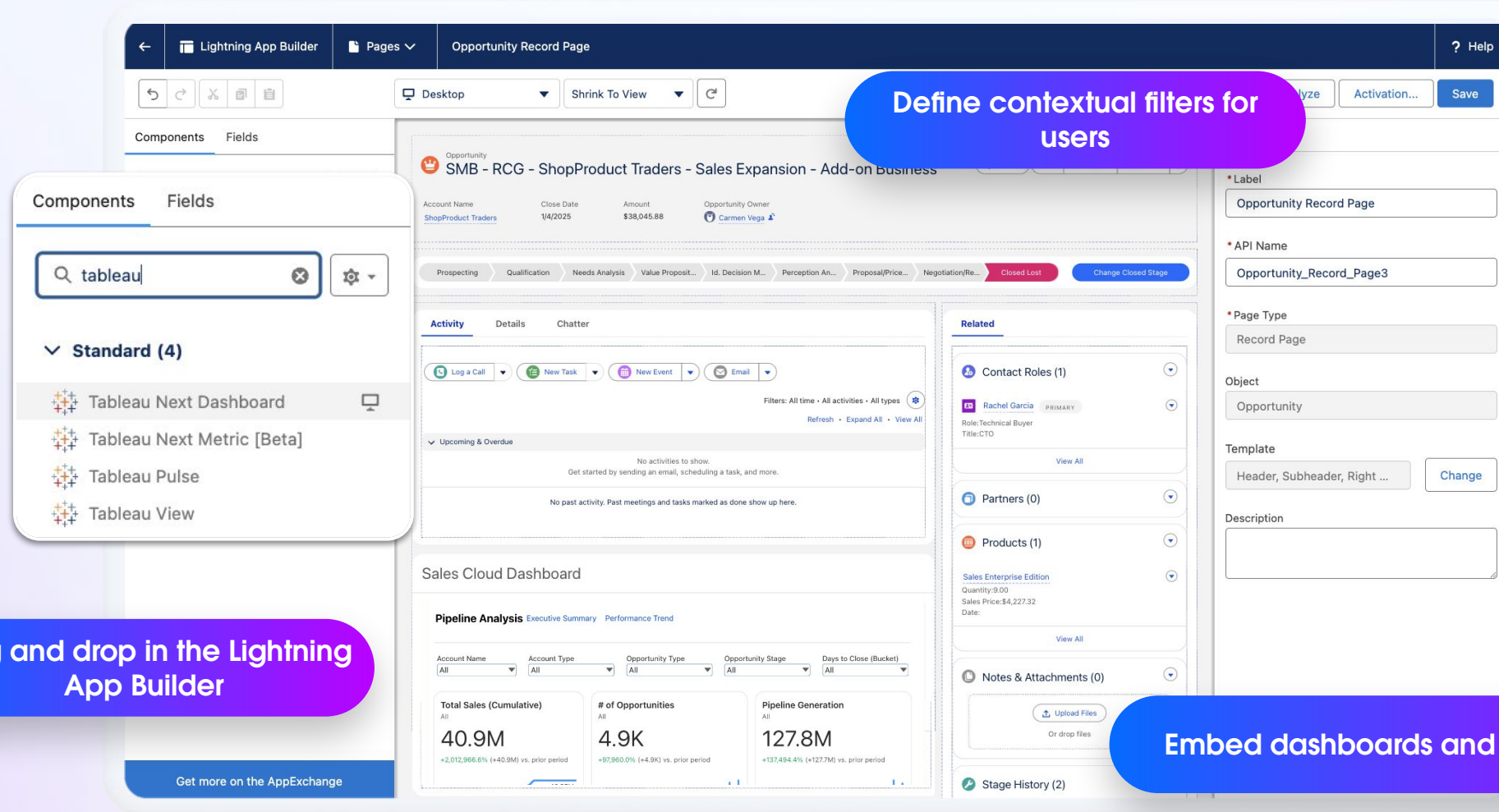


Conversational analytics at your fingertips

Get actionable insights on-the-go

Embedded Analytics in Salesforce

Bring insights directly into the flow of work



The screenshot displays the Salesforce Lightning App Builder interface for an Opportunity Record Page. The main content area shows an opportunity record for 'SMB - RCG - ShopProduct Traders - Sales Expansion - Add-on Business' with a status of 'Closed Lost'. Below the record, there are sections for 'Activity', 'Sales Cloud Dashboard', and 'Pipeline Analysis'. The 'Pipeline Analysis' section includes a summary table:

Account Name	Account Type	Opportunity Type	Opportunity Stage	Days to Close (Bucket)
All	All	All	All	All

Summary Metrics:

- Total Sales (Cumulative): 40.9M (+2,012,966.6% (+40.9M) vs. prior period)
- # of Opportunities: 4.9K (+97,960.0% (+4.9K) vs. prior period)
- Pipeline Generation: 127.8M (+137,494.4% (+127.7M) vs. prior period)

On the left, a 'Components' palette is open, showing a search for 'tableau' and a list of standard components: Tableau Next Dashboard, Tableau Next Metric [Beta], Tableau Pulse, and Tableau View. A blue callout bubble points to the 'Tableau Next Dashboard' component.

On the right, a configuration panel for the embedded dashboard is visible, with fields for Label, API Name, Page Type, Object, Template, and Description. A blue callout bubble points to the 'Label' field.

At the bottom right, a blue callout bubble points to the 'Embed dashboards and metric cards' button.

Drag and drop in the Lightning App Builder

Define contextual filters for users

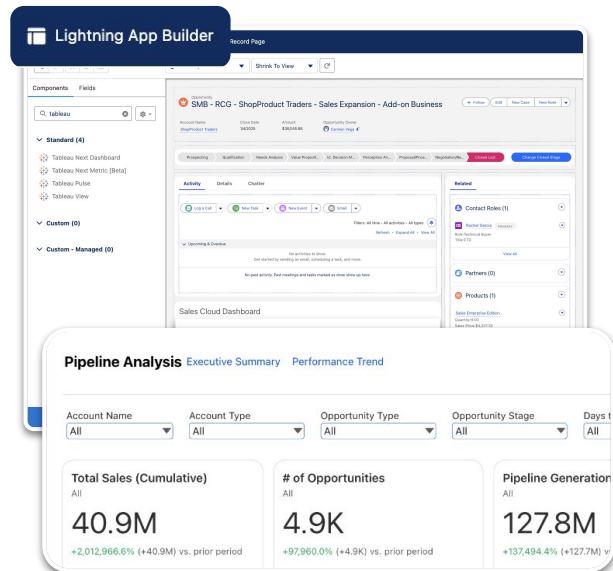
Embed dashboards and metric cards

Get more on the AppExchange

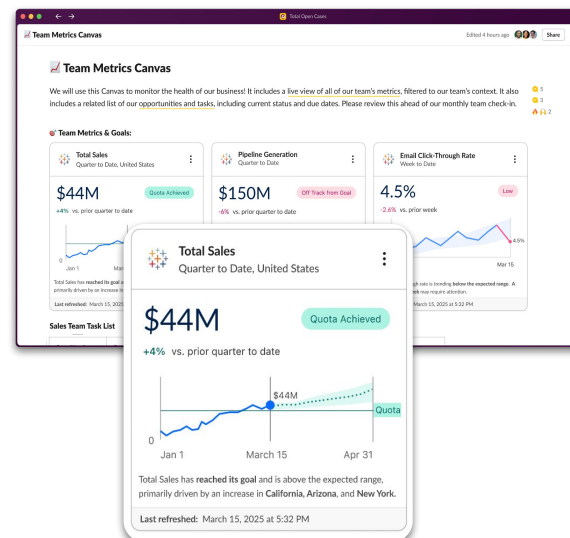
Built on the Salesforce Platform

Embed analytics anywhere

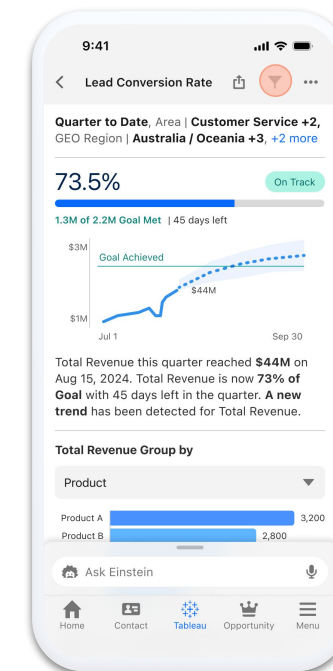
Salesforce



Slack

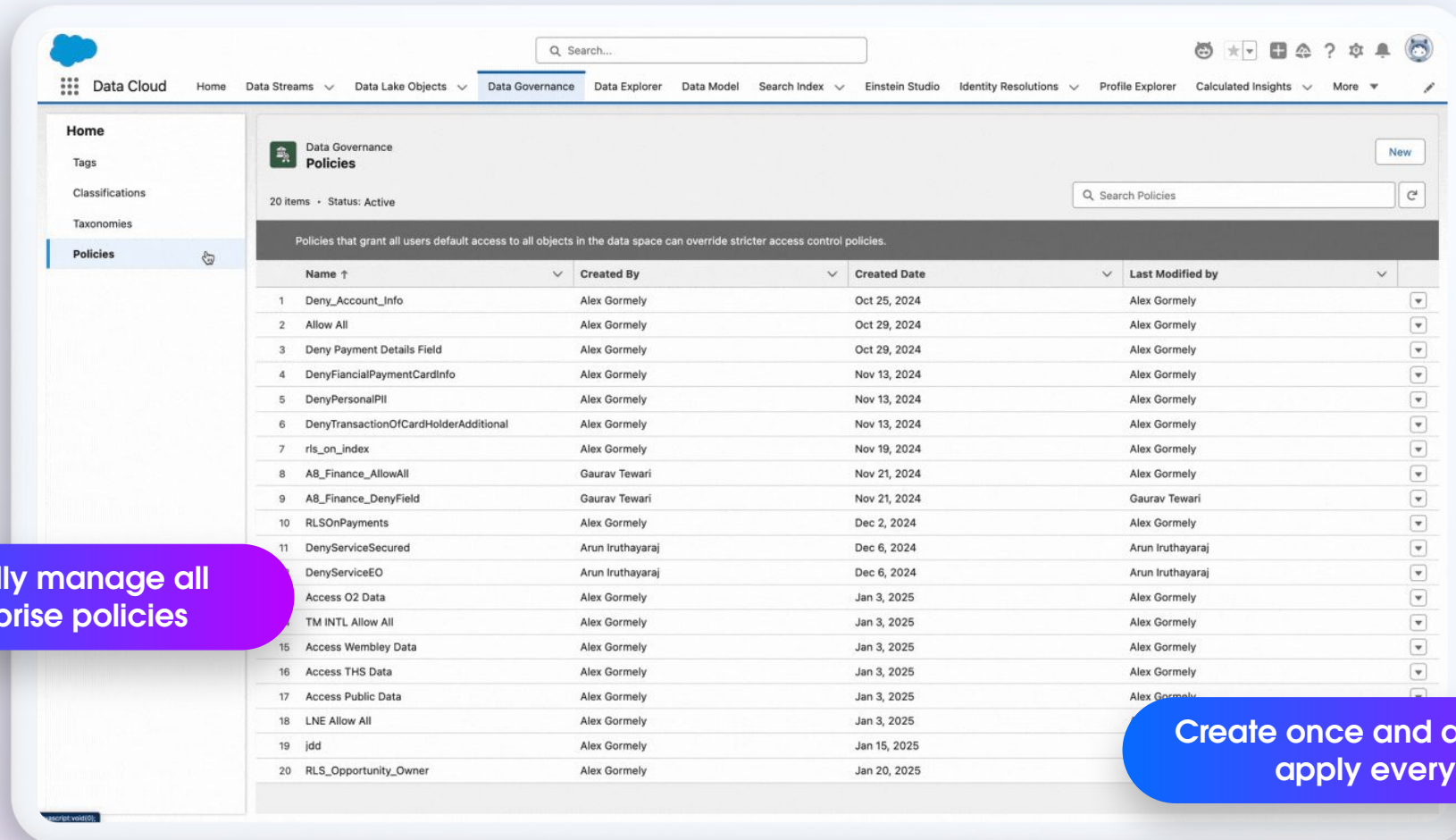


Mobile



Policy Based Governance

Maintain trust with Object, Field and Row Security



Search...

Data Cloud Home Data Streams Data Lake Objects Data Governance Data Explorer Data Model Search Index Einstein Studio Identity Resolutions Profile Explorer Calculated Insights More

Home

- Tags
- Classifications
- Taxonomies
- Policies**

Data Governance Policies

20 items · Status: Active

Search Policies

Policies that grant all users default access to all objects in the data space can override stricter access control policies.

	Name ↑	Created By	Created Date	Last Modified by
1	Deny_Account_Info	Alex Gormely	Oct 25, 2024	Alex Gormely
2	Allow All	Alex Gormely	Oct 29, 2024	Alex Gormely
3	Deny Payment Details Field	Alex Gormely	Oct 29, 2024	Alex Gormely
4	DenyFiancialPaymentCardInfo	Alex Gormely	Nov 13, 2024	Alex Gormely
5	DenyPersonalPII	Alex Gormely	Nov 13, 2024	Alex Gormely
6	DenyTransactionOfCardHolderAdditional	Alex Gormely	Nov 13, 2024	Alex Gormely
7	ris_on_index	Alex Gormely	Nov 19, 2024	Alex Gormely
8	A8_Finance_AllowAll	Gaurav Tewari	Nov 21, 2024	Alex Gormely
9	A8_Finance_DenyField	Gaurav Tewari	Nov 21, 2024	Gaurav Tewari
10	RLSONPayments	Alex Gormely	Dec 2, 2024	Alex Gormely
11	DenyServiceSecured	Arun Iruthayaraj	Dec 6, 2024	Arun Iruthayaraj
	DenyServiceEO	Arun Iruthayaraj	Dec 6, 2024	Arun Iruthayaraj
	Access O2 Data	Alex Gormely	Jan 3, 2025	Alex Gormely
	TM INTL Allow All	Alex Gormely	Jan 3, 2025	Alex Gormely
15	Access Wembley Data	Alex Gormely	Jan 3, 2025	Alex Gormely
16	Access THS Data	Alex Gormely	Jan 3, 2025	Alex Gormely
17	Access Public Data	Alex Gormely	Jan 3, 2025	Alex Gormely
18	LNE Allow All	Alex Gormely	Jan 3, 2025	Alex Gormely
19	jdd	Alex Gormely	Jan 15, 2025	Alex Gormely
20	RLS_Opportunity_Owner	Alex Gormely	Jan 20, 2025	Alex Gormely

Centrally manage all enterprise policies

Create once and automatically apply everywhere



Increased overall Customer Satisfaction (CSAT)
by ~20% after adopting Tableau Next and Data 360



Tableau Next: Turning Data Insights into Better Customer Experiences at Engine

Problem

Engine, a Denver-based travel technology company with a private hotel booking platform, struggled with a rigid, custom-built analytics system that was difficult to maintain. This legacy setup left the company lacking crucial insights into customer intent, utterances, and the performance and satisfaction with their AI-driven service.

Solution

Engine transformed its service operations with Tableau Next. By replacing a rigid legacy system with agentic analytics, real-time insights now flow directly into Slack and Salesforce workflows. Chloe, their employee agent, automates routine tasks, freeing staff for personalized support. With semantic data models and daily analytics, Engine tracks KPIs, customer interactions, and security trends—making data accessible to all and driving efficiency, smarter decisions, and higher CSAT.



Tableau



Sales



Data 360



Slack

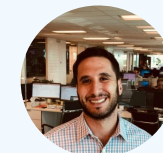


Agentforce



Service

“Tableau Next has simplified tracking KPIs by enabling the natural building and joining of models within the semantic layer. This has helped us measure the effectiveness of our agents by tracking two main metrics - customer satisfaction and how effectively our internal teams are servicing customers.”



Joshua Stern
Director, GTM Systems



America On Tech Transforms Grant Reporting with Tableau Next

32x faster reporting process, improving time to insight from four days to one

20% more efficient saving staff one day per week for high-impact program work

100% adoption of AOT's Data & Development team members



Problem

America On Tech (AOT), a nonprofit that prepares underestimated students for technology careers, struggled to create annual grant reports for 50+ funders. Grants come with strict guidelines to provide progress reports and respond to impact data requests, often taking 4 days to compile per grant. This intensive manual process diverted staff from cultivating strong funder relationships.

Solution

With Agentforce and Tableau Next, AOT generates customized, data-driven reports in under an hour. From staff prompts, the AI agent autonomously gathers student success data and visualizes it, producing charts and graphs ready to analyze for reporting. AOT can quickly show that students in its programs meet funder requirements by completing internships and advancing in technology careers. With time freed from reporting, staff can cultivate stronger funder relationships that sustain growth and mission impact.



Agentforce



Tableau



Sales



Marketing



Service



Data 360

“Now anyone on the team can ask questions to the agent and have all their answers in a matter of minutes. It speeds up the whole process and our ability to get back to our partners faster, which they appreciate, and our Salesforce administrator and the rest of our staff are able to work on higher-level strategic projects.”



Jessica Santana
CEO
America On Tech



Leave a Nest Turns Data into a Profit Multiplier with Tableau Next and Slack

Improved analytics adoption among employees from 10% to 80%

Slashed time required to generation and respond to customer insights by more than 80%

Saved 4,500 hours per month across 150 employees



Problem

Based in Tokyo, Japan with subsidiaries in Southeast Asia, UK, and US, Leave a Nest provides knowledge manufacturing as a service, which gathers worldwide knowledge and research and enables people to better society and solve global problems. They already had leveraged their core Salesforce platform for more than a decade, but needed a way to leverage the vast amount of data accumulated over time to further scale their business.

Solution

Leave a Nest centralized their data with Data 360 and accesses Tableau Next and Slack to recruit, promote, and track their conferences far more effectively and easily than in the past. Not only do employees have intuitive dashboards, but they can also ask questions of their data directly in Slack on mobile devices. This enables them to collaborate around trusted insights and visualizations to answer all their questions and quickly take action.



Tableau



Sales



Heroku



Data 360



Slack

“Tableau Next and Slack have given us the competitive advantage of running our events with much greater precision, leading to stronger connections and better outcomes for both researchers and industry partners. The most significant benefit is not just efficiency, but making things possible that were previously impossible.”



Takeshi Hiratsuka
Director, Leave a Nest Knowledge

Tableau powers all of Salesforce

Executives

Sales

Service

Marketing

46K+
monthly
active
users

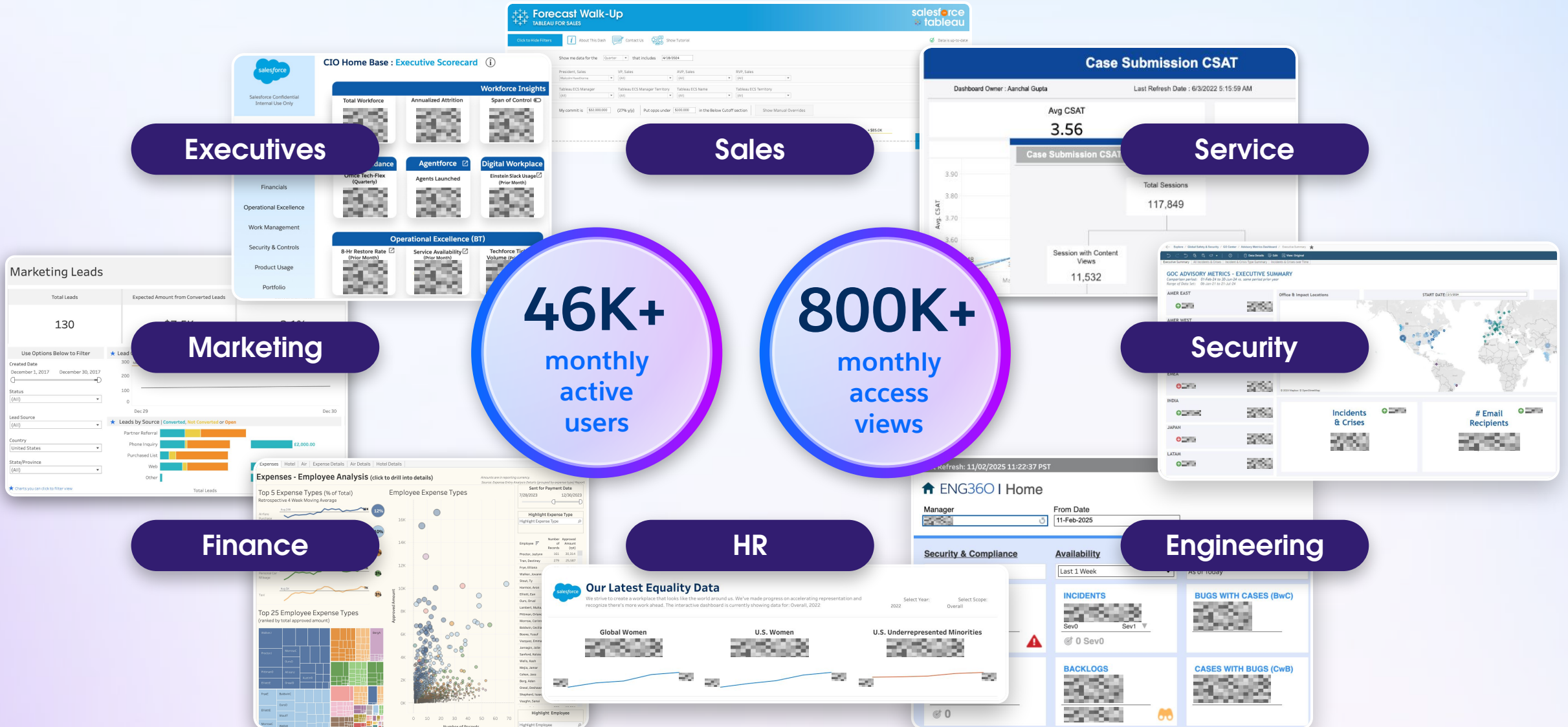
800K+
monthly
access
views

Security

Finance

HR

Engineering



Get started with Tableau Next

Tableau+

is your path to Tableau Next

Learn more at

salesforce.com/tableau-next

How the Concierge skill works

Conversation

Plan

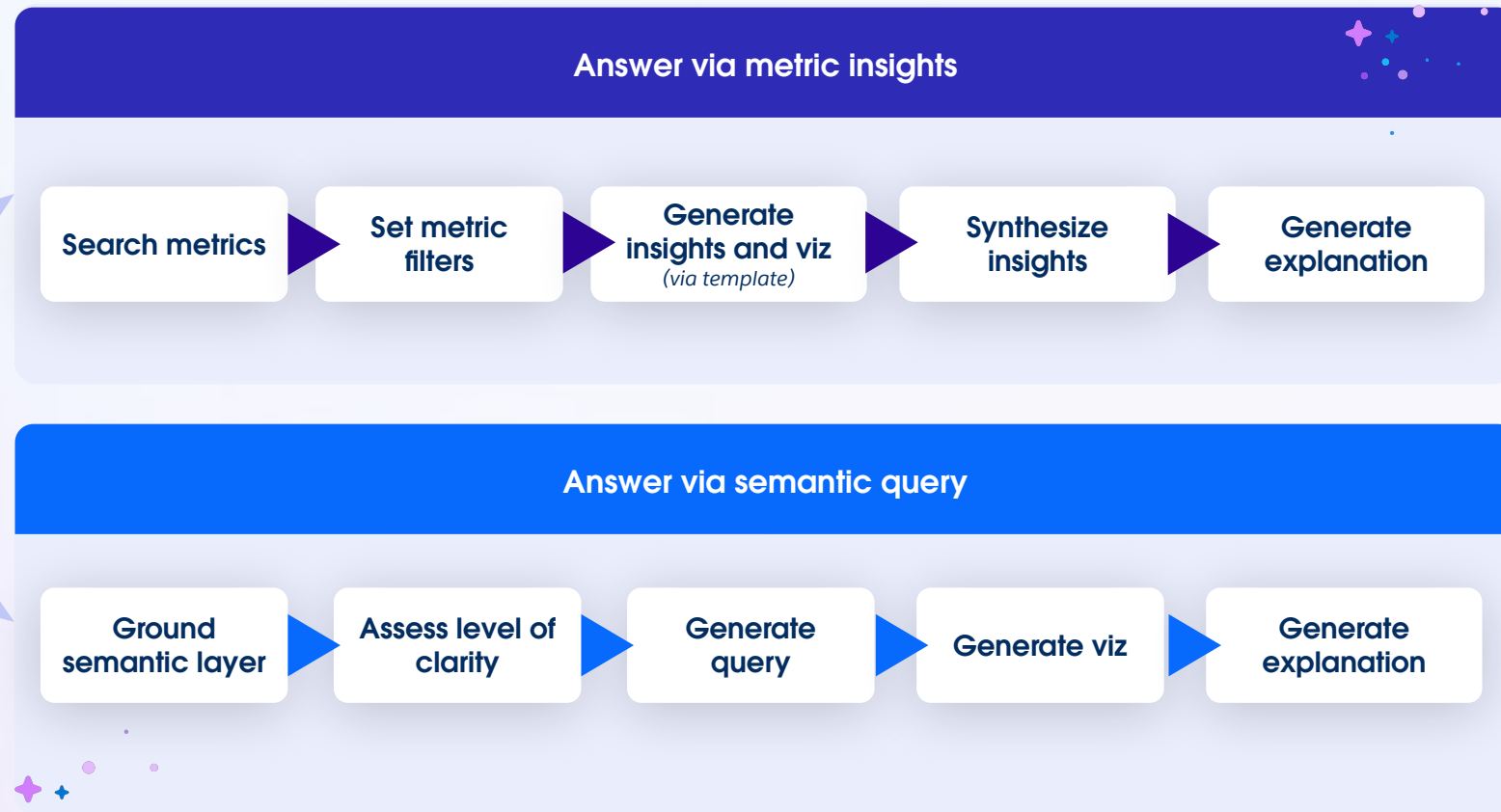


Execute

Outcome

Ask your agent

I'm Agentforce, your trusted AI agent.

How many active leads are in my pipe? Am I trending up from last quarter?




Agent generates a response

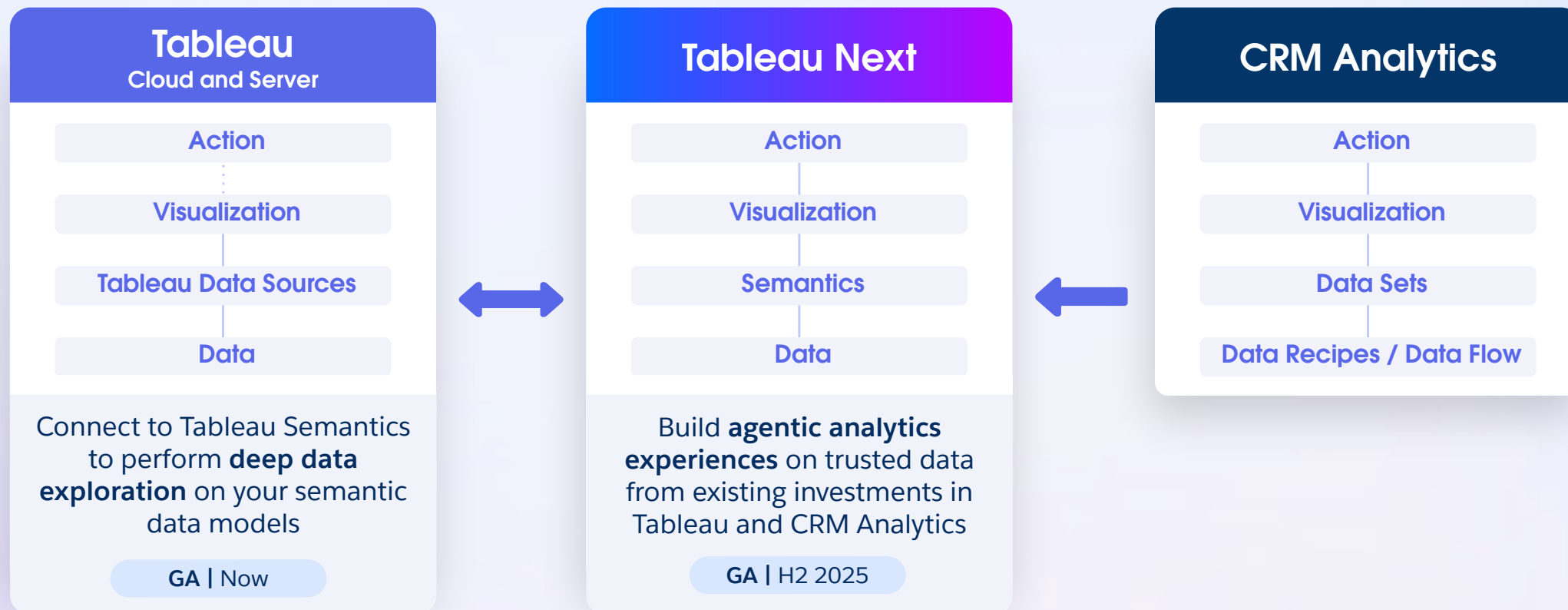
In total, 57 leads have completed a demo, which is up 11% from Q3.

Active Leads
Employee ID 80973 - Pipeline Dashboard

57
+11% vs. Prev. Quarter



One unified portfolio built for the agentic era



Analytics Interoperability



Thank You

