

Selling the Limitless Workforce

A Sales Management Strategy for Salesforce Agentforce

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1. Background

1.1 The Pre-Agentforce Sales Model

Salesforce has dominated enterprise customer relationship management (CRM) since 1999, when it introduced the software-as-a-service (SaaS) model as a direct challenge to on-premise vendors such as Siebel Systems and SAP. By fiscal year 2025 (FY25), Salesforce reported revenue of approximately \$37.9 billion and held an estimated 21.7 percent share of the global CRM market, nearly four times the share of its closest competitor.¹ Its platform integrates sales automation, customer service, marketing, commerce, and analytics under a unified data architecture, serving more than 150,000 enterprise customers worldwide.

The commercial model underpinning this position was built on predictability. Salesforce sold seat-based subscriptions under multi-year enterprise agreements, with revenue recognized over the contract term. Distribution relied on a large global direct sales force for enterprise accounts, supported by a partner ecosystem that included global system integrators (GSIs) such as Accenture, Deloitte Digital, and IBM Consulting, and more than 5,000 independent software vendors (ISVs) publishing applications through the AppExchange marketplace.² The structure rewarded relationship depth, renewal discipline, and contract scale. It was built for a world where software augmented human labor rather than replaced it.

Salesforce structured its sales force along two axes: account size and geography. By account size, customers fell into four tiers. Small and medium-sized businesses (SMBs) were served through a high-velocity inside sales motion. Commercial and mid-market accounts were handled with a more consultative approach. Enterprise accounts were assigned dedicated account executives (AEs) managing long-cycle, multi-stakeholder deals. A global and strategic accounts team handled the largest multinational relationships.³ This tiered architecture is widely adopted across SaaS because the skills, sales cycles, and commercial expectations of each segment differ enough to require distinct motions rather than a single unified one.⁴

Pre-Agentforce pricing was seat-based and tiered by product and feature access. Sales Cloud, the flagship CRM product, has historically run across four price points: Starter, Pro Suite, Enterprise, and Unlimited. In August 2025, Salesforce raised list prices on Enterprise and Unlimited by roughly six percent and introduced Agentforce 1 Sales as a premium tier at \$550 per user per month.⁵ Enterprise deals were almost universally multi-year, typically three years, with pricing locked in exchange for contract length.⁶ Once a contract was signed, revenue was recognized across the term and the renewal conversation began well before expiration. Growth within an existing account meant adding users, upgrading tiers, or cross-selling additional clouds, all manageable through the existing relationship without reopening the commercial structure.

The compensation model reinforced this design. Enterprise AEs carry annual quotas of approximately \$1.6 million, with a median on-target earnings (OTE) of \$320,000, a 49/51 base-to-variable split, and an average deal size of roughly \$202,975. As of early 2026, only 43.0 percent of enterprise AEs hit or exceeded their annual quota.⁷ Variable pay was tied predominantly to new logo acquisition and contract value at signing, which incentivized reps to maximize upfront deal size and move quickly to the next opportunity once a contract closed. Attainment below half the sales force is consistent with broader SaaS norms but significant in the context of an organization whose cost base represents a substantial share of total revenue.

That cost base is large. Salesforce's sales and marketing spend reached \$13.257 billion in FY25, approximately 35 percent of revenue, and historically between 36 and 44 percent.^{2 8} Salesforce competed not on product superiority alone but on the reach, relationship depth, and execution capacity of its global sales force. The model was, in essence, a bet that a large, well-compensated direct sales organization operating within a structured renewal cycle could generate predictable, compounding growth at enterprise scale. That bet held for nearly two decades. Agentforce breaks several of the assumptions on which it was built.

1.2 Agentforce and the Shift to Agentic AI

Launched in October 2024, Agentforce is Salesforce's autonomous AI agent platform and a departure from every product the company previously sold. Where Sales Cloud, Service Cloud, and Marketing Cloud amplified what a human employee could do, Agentforce deploys software agents that perceive a situation, form a plan, and execute multi-step business tasks without requiring human initiation at each step. The platform combines a reasoning engine (Atlas), a unified customer data layer (Data Cloud), and a governance framework (Einstein Trust Layer) that together let agents act on real-time data under enforced compliance rules. Unlike traditional chatbots, agents can be triggered by data changes, business rules, or application programming interface (API) calls from external systems,⁹ operating continuously across any channel without a person at their desk.

Early results show genuine traction. Within Salesforce's own operations, Agentforce resolved 84 percent of customer service queries autonomously across more than 380,000 support interactions,¹⁰ and external customers including Wiley, Williams-Sonoma, and Heathrow Airport have reported measurable returns. By Q4 FY26 (reported February 25, 2026), Agentforce annual recurring revenue (ARR) had reached \$800 million, up 169 percent year-over-year. Salesforce had closed 29,000 cumulative deals, up 50 percent quarter-over-quarter. Accounts in production grew nearly 50 percent quarter-over-quarter, and more than 60 percent of Q4 Agentforce and Data 360 bookings came from existing customer expansion, with all top-10 wins including Agentforce 360 Platform.¹¹ The enterprise book is performing strongly in absolute and relative terms.

The Q4 FY26 data also reveals that traction is concentrated in existing enterprise accounts, while total agent-production volume remains a small fraction of Salesforce's 150,000 global customer base. The gap between a rapidly growing enterprise expansion motion and broad-based adoption across the installed base defines the stakes of this report. The sales organization, compensation model, pricing architecture, and buyer engagement process Salesforce built to sell seat-based subscriptions are misaligned with what selling autonomous digital labor requires. The analysis that follows examines those misalignments in turn, beginning with how enterprise buyers actually engage with autonomous agents and ending with the competitive landscape Salesforce must contend with as it executes the transition.

1.3 Competitive Pressure and the Strategic Case for Agentforce

For most of its history, Salesforce's dominance was self-reinforcing. The SaaS model it pioneered created deep switching costs across enterprise workflows, while the scale of its direct sales force and partner network made meaningful replication by new entrants effectively prohibitive. By 2023, however, that dominance faced a structural challenge on two fronts: an accelerating shift in the competitive landscape and a significant change in the nature of the underlying technology, both of which demanded a fundamental reevaluation of how Salesforce competed.

The first source of pressure came from within the CRM category itself. By 2022, HubSpot had evolved from a small business tool into a credible enterprise alternative, reaching parity with Salesforce across startup and mid-market segments by 2024 and 2025.¹² Alongside HubSpot, a newer cohort of AI-native entrants including Artisan, Qualified, Monaco, and Aurasell began combining CRM data with built-in prospecting automation and agentic workflows, targeting the same revenue-generating functions for which Salesforce charged a premium.¹² Unlike traditional competitors, these platforms were designed to capture and act on customer data without manual input, fundamentally changing the value calculus for enterprise buyers evaluating alternatives.

The second and more structurally disruptive pressure came from outside the CRM category entirely. The rapid enterprise adoption of large language model platforms created a parallel path through which organizations could assemble CRM-like capabilities without purchasing dedicated CRM software. Microsoft 365 Copilot provides enterprise customers with AI-powered workflows spanning outreach, lead qualification, meeting intelligence, and customer engagement, all grounded in enterprise data and governed by existing Microsoft security infrastructure.¹³ A company with an active Microsoft 365 enterprise agreement can configure these CRM-adjacent functions through Copilot Studio without initiating a separate Salesforce contract. Industry analysts have identified this as a legitimate substitution threat, noting that generative AI tools enable organizations to build point solutions outside traditional software platforms, potentially displacing incumbent vendors from specific high-value workflows without a formal platform migration.¹⁴

Together these pressures mark a structural shift in Salesforce's competitive position. Using product differentiation as the vertical axis and competitive intensity as the horizontal axis, the CRM category is moving from the market creation quadrant, characterized by high differentiation and limited direct competition, toward the commodity trap quadrant, characterized by eroding differentiation and intensifying rivalry (see Exhibit 1). This shift is not hypothetical. Salesforce revenue growth has declined markedly from 2023 onward, a trend attributable in part to intensifying competition and market saturation.¹⁵ Gartner projects that 60 percent of B2B seller work will be executed through AI-powered interfaces by 2028, up from approximately five percent in 2023,¹⁶ meaning the competitive dynamics compressing Salesforce's differentiation will accelerate rather than stabilize.

Agentforce represents Salesforce's strategic response to this trajectory. Rather than defending market share in an increasingly commoditized CRM segment, Salesforce is using Agentforce to reposition itself in a contested leadership quadrant: high product differentiation within a competitive market. The mechanism for this repositioning is a fundamental change in what the company sells. Where CRM licenses software seats to human users, Agentforce sells autonomous digital labor, a category in which Salesforce's proprietary enterprise data relationships, its established partner network, and its Einstein Trust Layer represent competitive assets that AI-native vendors and horizontal productivity platforms cannot replicate at equivalent scale.

The urgency of this transition is made concrete by the scale of Salesforce's commercial investment. The sales and marketing spend established in Section 1.1, roughly 35 percent of revenue, is not a support function. It is the primary engine through which Salesforce converts product investment into revenue. If Agentforce is to deliver the same commercial results as the products that built that revenue base, the sales organization must be reevaluated and realigned around what this new product actually requires. Without adjusting how that organization is structured, incentivized, and deployed, the misalignment becomes a direct threat to the return on the company's single largest cost line. How Salesforce should sell and deploy Agentforce to maximize adoption and maintain competitive advantage is therefore not simply a product question. It is the central sales management challenge the company now faces, and the one this report sets out to address.

2. Analysis

2.1 Buyer Behavior Misalignment

Salesforce's pre-Agentforce sales model was designed for a need-triggered market, one in which enterprise buyers arrived with a defined problem, conducted their own research, and engaged a vendor to solve it. Agentforce does not operate entirely in that market. Agentic AI as a product category is novel enough that most enterprise buyers, outside a small cohort of early adopters, have not yet defined the problem it solves. The data reflects this clearly. Worker access to AI rose by 50 percent in 2025, and 71 percent of firms reported using generative AI in at least one function, but only 34 percent of organizations are genuinely reimagining their business with the technology.¹⁷ Massachusetts Institute of Technology (MIT) research found that 95 percent of companies investing in AI systems are seeing zero measurable bottom-line impact, with only 5 percent of integrated pilots extracting meaningful value.¹⁸ Buyers are broadly aware of AI and broadly uncertain about where to begin. They are not, for the most part,

walking into conversations asking for autonomous agents. Salesforce's sales force must therefore create demand rather than harvest it, a different process than the renewal-driven model it was built around.

The second barrier compounds the first. Many enterprise buyers arrive at any autonomous agent conversation carrying institutional skepticism formed by prior chatbot deployments that failed. A Forrester Consulting study found that consumers gave their chatbot interactions an average rating of 64 percent, with 50 percent reporting frequent frustration and nearly 40 percent describing their interactions as negative. Nearly three-quarters of customers agreed that chatbots could not handle complex questions.¹⁹ High-profile cases such as Klarna, which replaced 700 customer service agents with AI only to see customer satisfaction fall and begin quietly rehiring human staff, have reinforced enterprise caution at the leadership level.²⁰ Agentforce must overcome a credibility deficit created by an entirely different generation of technology before it can be evaluated on its own merits. The sales motion has to differentiate Agentforce from the chatbot category before a commercial conversation can begin, a task the existing playbook was not designed to perform.

The third barrier is the most disruptive to the sales process. Even when a buyer develops genuine interest, the deployment process frequently surfaces data quality and integration problems the buyer did not know they had. A Forrester survey of 500 enterprise data leaders found that 73 percent identified data quality and completeness as the primary barrier to AI success, ranking it above model accuracy, computing costs, and talent shortages.²¹ Data quality issues more than doubled as the top obstacle to AI deployment between 2024 and 2025, rising from 19 percent to 44 percent of organizations citing it as their primary challenge.²² For Agentforce specifically, an agent's effectiveness depends entirely on its ability to access clean, unified, real-time customer data through Data Cloud. When that infrastructure is fragmented, as it frequently is across large enterprises with legacy systems, the deployment stops being a software purchase and becomes an organizational diagnosis. A sales conversation turns into a change management engagement mid-cycle, stalling deals that had genuine enthusiasm at the start. These three barriers (novelty, chatbot skepticism, and data readiness) argue for repositioning the first enterprise interaction from a product pitch to a structured diagnostic.

2.2 Market Segmentation: Two Motions for Two Different Buyers

Salesforce's instinct has always been to lead with enterprise. Its organizational structure, compensation model, and partner network are all built around large account pursuit, and that is where the company has generated most of its \$37.9 billion in annual revenue. The Q4 FY26 results discussed in Section 1.2 confirm that the enterprise focus continues to produce strong absolute growth for Agentforce. The segmentation question is therefore not whether enterprise remains a primary revenue engine. The question is whether the same large-account motion is sufficient to reach broad-based adoption across the 150,000-customer base, or whether a distinct SMB-focused motion is required alongside it.

Microsoft CEO Satya Nadella confirmed on a recent earnings call that more than 90 percent of the Fortune 500 now use Microsoft 365 Copilot in some form.²³ Approximately 70 percent of Fortune 500 companies have adopted Copilot in at least one department, though many deployments remain pilot programs and paid adoption represents only 3.3 percent of total Microsoft 365 users.²⁴ In practice, this means Copilot is present in most large enterprises without having displaced existing workflows at scale. For a Salesforce AE entering one of those accounts with an Agentforce pitch, the conversation is frequently not about introducing AI automation but about justifying a second AI platform investment at a moment when chief financial officers (CFOs) are scrutinizing AI spend. That is a harder conversation than the one Salesforce's enterprise motion was designed to win, even as it is one Salesforce is demonstrably still winning in its installed base.

The SMB segment presents a different opportunity, and one with specific historical significance for Salesforce. The company was founded as an SMB disruptor, built on the premise that CRM should be accessible to businesses that could not afford enterprise software, before spending two decades moving upmarket into the large accounts that now define its commercial model. With Agentforce, a distinct opportunity exists alongside the ongoing enterprise motion.

U.S. SMB AI usage more than doubled from 14 percent in 2023 to 39 percent in 2024, reaching 55 percent by 2025, with adoption highest at 68 percent among firms with 10 to 100 employees.²⁵ These buyers have not deployed Microsoft 365 Copilot enterprise contracts at scale, the dominant SMB use cases map directly to Agentforce's capabilities, and the value proposition of handling customer interactions without adding headcount is clearest for a growing business that cannot afford to staff a 24-hour service operation. Salesforce's own research across 3,350 SMB leaders found that 91 percent of SMBs using AI report revenue growth, with 87 percent saying it helps them scale operations and 86 percent reporting improved margins.²⁶ The AI market for SMBs is projected to grow from \$24.66 billion in 2024 to \$99.79 billion by 2035, with customer service automation as the largest application segment.²⁷

The strategic question is therefore not "enterprise or SMB" but whether the SMB opportunity warrants a distinct commercial motion alongside the enterprise motion that is already working. Three observations argue that it does. First, SMB buyers are underserved by the enterprise account model. They are too small to justify a dedicated AE and too diverse to reach through the existing partner channel. Second, the Agentforce value proposition is, if anything, clearer for SMBs than for enterprises, because the headcount arithmetic is immediately legible to a founder or operator who cannot afford to hire. Third, Salesforce has already embedded Agentforce into its Starter and Pro Suite packages, meaning the on-ramp is in place. What is missing is a commercial strategy designed to convert SMB trial usage into scaled, paid consumption. Whether Salesforce's current commercial infrastructure, built around large enterprise deal execution, can serve that segment effectively is the misalignment the following sections examine.

2.3 Sales Levers: How the Misalignment Runs Through the Organization

Compensation

Unlike a seat-based subscription where revenue is locked in at signing, Agentforce generates revenue progressively as agents are used, expanded to new use cases, and deepened within an account over time. The compensation structure Salesforce built for its pre-Agentforce model is misaligned with what the consumption-based approach requires. Variable pay tied predominantly to contract value at signing and new logo acquisition (as detailed in Section 1.1) means a rep who closes an Agentforce pilot, collects their commission, and moves to the next new logo has done exactly what the compensation structure rewarded them to do, and has simultaneously stepped back from the account at the moment its commercial value is beginning to grow. Without a compensation redesign that ties a defined portion of variable pay to consumption growth within existing accounts over a rolling period, the financial incentives of Salesforce's sales force will continue to point away from the post-close behavior the consumption model depends on.

Training and Supervision

The supervision problem compounds the compensation problem. Sales managers were developed to coach reps on deal size, pipeline coverage, and renewal timing. Those are the right metrics for a subscription business and incomplete metrics for a digital labor platform. Salesforce's own sixth State of Sales report found that 67 percent of reps do not expect to meet their quota in the current year and 84 percent missed it the year prior, while non-selling tasks (administrative work, meeting preparation) consume 70 percent of the average rep's working week.²⁸ Only 26 percent of sales professionals receive one-on-one coaching at least weekly,²⁹ meaning most reps are navigating an already difficult selling environment with minimal personalized guidance. Selling Agentforce requires a more diagnostic supervisory posture. Managers must identify where in the buyer journey individual reps are struggling (awareness, consideration, purchase, or post-close expansion) and coach accordingly. That field-based coaching model is not what the existing supervisory infrastructure was designed to deliver, and it cannot be retrofitted through a training module alone.

Organizational Disruption

The organizational disruption created by Agentforce itself makes both problems harder to solve. Salesforce is simultaneously asking its sales force to sell autonomous digital labor and demonstrating, through its own workforce decisions, what autonomous digital labor does to human headcount. CEO Marc Benioff confirmed in September 2025 that Salesforce had reduced approximately 4,000 customer support roles, stating directly that the company needed fewer staff as Agentforce handled an increasing share of customer interactions.³⁰ Salesforce recorded approximately 5,000 total layoffs in 2025, compared to roughly 1,000 the year prior.³¹ For a sales organization already under quota pressure, watching colleagues lose jobs to the product they are being asked to sell creates a credibility and motivation problem no training program can fully address. A rep who privately fears Agentforce represents a threat to their own role is unlikely to be a persuasive advocate for it in front of a customer. Salesforce's internal narrative around Agentforce must resolve this tension explicitly, positioning the product as a tool that elevates the strategic value of the enterprise seller rather than a signal of the seller's eventual obsolescence, before the sales organization can be expected to carry that message credibly to market.

2.4 Pricing Strategy Misalignment

Agentforce creates value differently than any product Salesforce has previously sold, and its pricing history reflects the difficulty of translating that difference into a model enterprise procurement can actually approve. When Agentforce launched in October 2024, Salesforce priced it at \$2 per conversation, a metric that appeared straightforward but collapsed in practice. Customers and analysts immediately questioned what counted as a conversation, whether a multi-turn exchange was one conversation or several, and whether a query that triggered multiple backend processes would generate multiple charges.³² One support team leader calculated that five agents handling 70 conversations daily would incur roughly \$900 in daily costs, a prohibitive figure for mid-market organizations where budget predictability is critical. The result was 5,000 Agentforce deals in the first two quarters, of which only 3,000 were paid.³³

In May 2025, Salesforce pivoted to Flex Credits, a pay-per-action model charging \$0.10 per action with credits sold in packs of 100,000 for \$500, and introduced the Flex Agreement allowing organizations to convert between user licenses and credits. By late 2025, Salesforce had added a third model: per-user licenses at \$125 per user per month for employee-facing agents, and Agentforce 1 Editions at approximately \$550 per user per month for the most comprehensive tier. All three models now run simultaneously, reflecting a deliberate strategy of letting customers self-select into the model that matches how they want to buy, rather than forcing a single commercial structure onto a market that has not yet converged on how to purchase digital labor.³⁴

The deeper problem is not which pricing metric Salesforce picks. Any consumption-based structure creates friction at the point of enterprise procurement, regardless of how granular or transparent the billing becomes. Enterprise procurement teams have relied on fixed-seat subscription models for budget planning, and consumption pricing breaks the predictability they depend on. It becomes a financial risk that must be managed rather than a contract to approve.³⁵ Research from enterprise pricing teams confirms that users actively avoid AI features even when free credits are included, because they fear being locked into something unpredictable, and that enterprise buyers push back on AI line items unless they are flat-rate or capped.³⁶ Salesforce's own chief information officer (CIO) research reinforces this: 90 percent of CIOs report that managing AI costs is limiting their ability to drive value.³⁷ The business sponsor within a prospective customer organization may be fully convinced of Agentforce's value, but the deal stalls inside their own procurement and finance teams because the commercial structure does not fit the approval frameworks those teams were built to operate within. The pricing architecture is evolving in the right direction,³⁸ however the sales enablement that should wrap around it has not kept pace.

2.5 Channel Management

Salesforce's channel was engineered for a single, repeatable motion: a global direct sales force acquires the customer, a GSI implements the platform over six to twelve months, and the AppExchange marketplace provides supplementary applications that extend the core product. That motion generated over two decades of compounding

revenue because the product it served was consistent enough in its requirements that one delivery model could serve nearly every customer. Agentforce breaks that consistency. Salesforce launched AgentExchange in March 2025 with more than 200 initial partners and hundreds of pre-built actions, topics, and templates, including Google Cloud, DocuSign, Box, and Workday, explicitly designed to compress implementation timelines and accelerate time to value.³⁹ Salesforce's own Forward Deployed Engineering (FDE) team reports reducing Agentforce deployment timelines from six months to as little as three weeks across more than 150 enterprise implementations using pre-built components and embedded technical support.⁴⁰

That speed is precisely what buyers say they want. It is also precisely what threatens the commercial model of the GSIs Salesforce depends on most to sell and deploy at enterprise scale. A GSI that has built a 500-person Salesforce practice on the economics of a six-month implementation engagement has limited enthusiasm for a marketplace that lets a customer go live in three weeks with a pre-built template. Salesforce needs the GSIs to carry Agentforce into enterprise accounts. It also needs AgentExchange to make Agentforce fast and accessible. Those incentives point in opposite directions, and Salesforce has not resolved the conflict.

Marketplace speed and consulting depth are not simply competing priorities. They serve different customer needs that often exist within the same account. For straightforward use cases, a pre-built AgentExchange component is genuinely sufficient. For accounts with fragmented data infrastructure, legacy system dependencies, and organizational change management needs, no pre-built component can substitute for the diagnostic work only a consulting partner can perform. Data readiness, identified in Section 2.1 as the largest deployment barrier, is not a problem the marketplace solves. It is the problem that makes GSI depth strategically necessary even as marketplace speed becomes commercially attractive.

Salesforce has begun addressing this tension. In April 2026, it launched the FDE Partner Network, an exclusive designation for vetted partners with proven Agentforce implementation track records, with Accenture and Deloitte as launch partners alongside IBM Consulting, PwC, KPMG, Capgemini, and others. Partners in the FDE network have driven one-third of all successful Agentforce implementations to date.⁴¹ The initiative is a meaningful structural response, but it leaves the underlying incentive misalignment unresolved. GSI partners only commit fully to a product when the economic model rewards that commitment, and a marketplace designed to reduce implementation hours is not, by itself, a compelling economic argument for a partner whose business model depends on billable hours.

2.6 Competitive Landscape

Salesforce faces meaningful pressure across three challenger categories: CRM suites, do-it-yourself (DIY) AI stacks, and AI upstarts. Each poses a different type of threat.

CRM suites, led by Microsoft, represent the most immediate and well-resourced threat. Microsoft's announcement of Wave 3 of Microsoft 365 Copilot in March 2026, including Copilot Cowork (built on Anthropic's Claude technology), Agent 365 (a governance control plane for enterprise agents), and the new Microsoft 365 E7 Frontier Worker Suite, which bundles E5, Copilot, and Agent 365 at \$99 per user per month beginning May 1, 2026, crystallizes a competitive threat that was abstract a year ago.⁴² E7 undercuts the per-seat component of Salesforce's Agentforce pricing stack (Agentforce 1 lists at \$550 per user per month) while giving Microsoft a direct procurement path into the same Fortune 500 accounts Salesforce targets. The competitive differentiator here is not price, which Salesforce will struggle to match given its lack of a horizontal productivity substrate, but depth of CRM data and breadth of the Agentforce ecosystem. No competitor matches the 200,000-customer CRM data foundation that Salesforce's agents draw from via Data Cloud, and no marketplace rivals the partner network being built through AgentExchange. Salesforce's deepening partnership with Anthropic, which allows Claude models to run within Salesforce's virtual private cloud (VPC) under Einstein Trust Layer governance, is a regulated-enterprise moat Microsoft's multi-model Frontier program does not replicate, particularly in financial services, healthcare, and other industries where data residency and auditability requirements make local model execution non-negotiable.

DIY AI stacks, represented primarily by hyperscalers such as Amazon Web Services (AWS) and Google Cloud pairing foundation models from OpenAI or Anthropic with bespoke infrastructure, are a more diffuse but significant long-term threat. Enterprises with mature technical teams can bypass platform vendors entirely, building agent solutions in-house. The appeal is not just cost control. It is ownership, particularly in a landscape where AI-related data privacy concerns are top of mind for enterprise buyers. Salesforce's answer must be the Einstein Trust Layer: zero data retention, data masking, and audit trail capabilities that give buyers enterprise-grade privacy guarantees without sacrificing the speed and sophistication of a pre-built platform. For buyers who would otherwise go DIY to own their data, Agentforce offers a credible alternative: ownership of outcomes without the burden of owning the infrastructure.

AI upstarts, including venture-backed specialists such as Sierra (reportedly valued at approximately \$10 billion on around \$100 million in ARR)⁴³ and Decagon, generate significant industry attention and have begun landing real enterprise logos in customer service operations. They are credible alternatives in narrow use cases. What they cannot offer at platform scale is the data foundation Salesforce has accumulated over two decades of CRM relationships, the switching costs that come with being embedded in mission-critical enterprise workflows, or the partner ecosystem required to deploy globally. A specialist that wins one niche use case is a feature-level competitor at platform scale, not a category-level one. The more consequential risk is reputational: high-profile failures in the AI sales development representative (AI-SDR) space have created industry-wide skepticism about agentic return on investment (ROI) claims, meaning Salesforce must defend Agentforce proof points more rigorously than a comparable Sales Cloud claim would have required two years ago.

The competitive risk is real. Salesforce's first-mover advantage in enterprise agentic CRM, combined with its CRM data foundation, AgentExchange ecosystem, and enterprise-grade trust infrastructure, gives it the assets required to lead. The risk is the loss of category leadership to a faster-moving competitor, most plausibly Microsoft, whose E7 bundle, Copilot Cowork, and Agent 365 governance layer together represent a coordinated enterprise AI play Salesforce must answer commercially even as Agentforce continues to grow. Sustaining category leadership requires Salesforce to keep winning the category definition battle: not just selling agents, but establishing itself as the platform through which enterprises manage the transition from human-only to human-plus-digital labor. The recommendations that follow address how the commercial organization must be restructured to execute on that ambition.

3. Recommendations

The analysis identifies a consistent structural pattern across every dimension of Salesforce's commercial organization. Its buyer engagement model, segmentation approach, compensation structure, pricing architecture, and channel incentives were all engineered for a seat-based subscription business and have not yet been rebuilt for a consumption-based agentic AI platform. To address these misalignments in a coordinated way, the recommendations must be anchored to a clearly defined outcome of interest. For the purposes of this report, we adopt CEO Marc Benioff's stated goal of one billion agents running on the Salesforce platform, declared at Dreamforce 2024, as the outcome of interest. This assumption anchors the four priorities that follow and provides the standard against which the recommendations should be evaluated. The four priorities below address these misalignments as a connected system.

3.1 Priority One: Build a Parallel SMB Motion Alongside Enterprise, and Lead Every Deal with Readiness

Two changes carry this priority: standing up a dedicated SMB motion sized to SMB economics, and repositioning the first enterprise interaction from product pitch to readiness diagnostic. The recommendations that follow enable both.

Sections 2.1 and 2.2 identified two distinct misalignments: an enterprise motion that needs to lead with diagnostic engagement rather than product pitch, and a 150,000-customer installed base whose SMB majority is not being served by the enterprise account model. The recommendation is therefore not to redirect the enterprise sales force toward SMB. The Q4 FY26 results show enterprise Agentforce is a strong growth engine that should not be weakened. The recommendation is to build a parallel, low-touch SMB motion that rides on the free Agentforce capacity already embedded in Starter and Pro Suite, while retooling the enterprise motion to be readiness-led rather than product-led.

Salesforce has already embedded Agentforce into its SMB-tier Suites at no additional cost, establishing the technical on-ramp.⁴⁴ The recommendation is to accelerate this with dedicated SMB sales capacity structured for high-velocity, product-led pilot conversion rather than large deal execution. This means an inside sales team sized to SMB economics (lower OTE, shorter sales cycles, higher deal volume), a digital lead-generation engine that routes trial users to paid conversion conversations, and customer success coverage (covered in Priority Four) sized to drive consumption expansion at a cost structure viable for sub-\$10,000 annual contract value (ACV) accounts.

There are approximately 34.8 million small businesses in the United States, of which roughly 6.3 million have employees.⁴⁵ The viable near-term Agentforce target narrows to businesses with 10 to 500 employees that have active customer-facing operations and sufficient digital infrastructure. Of Salesforce's 150,000 global customers, approximately 49 percent are small businesses with fewer than 50 employees,⁴⁶ implying roughly 73,500 existing Salesforce customers fall within the SMB range, an estimate based on third-party analysis. The three following scenarios capture an estimated revenue range:

- **Conservative (three years):** Converting 15 percent of the existing 73,500 SMB base, roughly 11,000 accounts at \$5,000 average revenue, plus 30,000 new accounts at \$8,000 average revenue produces approximately \$295 million in incremental annual SMB Agentforce revenue.
- **Moderate (five years):** Converting 25 percent of the existing 73,500 SMB base, roughly 18,400 accounts at \$9,000 average revenue, plus 75,000 new accounts at \$9,000 average revenue produces approximately \$840 million annually.
- **Optimistic (five to seven years):** Converting 35 percent of the existing 73,500 SMB base, roughly 25,700 accounts at \$12,000 average revenue, plus 150,000 new accounts at \$12,000 average revenue produces approximately \$2.1 billion annually. This figure assumes capture rates that imply Salesforce takes a disproportionate share of total SMB agentic spend and should be treated as an upper bound rather than a plan target.

A dedicated SMB inside sales organization of roughly 200 to 300 reps at fully loaded cost of \$180,000 to \$220,000 per rep, combined with estimated marketing, demand generation, customer success, and overhead costs of \$75 million, implies a total annual cost envelope of \$110 million to \$140 million at scale. The moderate scenario therefore produces a positive contribution margin within the five-year window even on conservative ramp assumptions. Total Agentforce ARR across all segments reached \$800 million in Q4 FY26, meaning a focused SMB motion executed well would represent an incremental revenue stream roughly on par with the current total Agentforce book within the moderate scenario's window. The broader SMB software market was valued at \$72.35 billion in 2025 and is projected to reach \$107.86 billion by 2031,⁴⁷ reinforcing the scale of the opportunity.

A serious argument cuts against the SMB motion, and it deserves direct engagement rather than omission. Three objections matter here. First, Salesforce has historically struggled in SMB. Prior efforts (Essentials, early Starter Suite) achieved limited traction against product-led-growth competitors such as HubSpot, and the cost structure of Salesforce's sales and implementation motion has not, historically, matched SMB willingness to pay. Second, SMB unit economics are unforgiving. Annualized SMB churn frequently runs 30 to 50 percent, net revenue retention (NRR) below 100 percent is common, and customer acquisition cost (CAC) payback targets of 8 to 12 months at sub-\$5,000 ACV require marketing and onboarding efficiency that Salesforce's enterprise-oriented systems were not designed to deliver. Third, the enterprise Agentforce motion is currently performing strongly; resource reallocation

that weakens it would undermine the very book of business whose Q4 FY26 results demonstrate Agentforce works at scale.

These objections are the reason the recommendation is for a parallel motion, not a reorientation. The SMB motion should be incremental sales capacity sized specifically to SMB economics, funded from growth investment rather than reallocated from enterprise, and operationally decoupled from the enterprise organization. The embedded free Agentforce tier in Starter and Pro Suite is the critical structural difference from prior SMB attempts: the product is already in the customer's hands at zero friction, so the commercial motion's job is conversion rather than acquisition. The measure of success is whether the parallel motion can demonstrate sustainable unit economics before it is scaled, not whether it immediately matches enterprise productivity per rep.

Regardless of segment, the first interaction with any buyer should be repositioned from a product pitch to a diagnostic engagement. This addresses the three buyer-behavior barriers identified in Section 2.1. A Pre-Sales Readiness Assessment Program should become the mandatory first interaction with every enterprise prospect, with AEs running a structured organizational diagnostic evaluating data quality, integration infrastructure, and internal alignment before any product pitch begins. This surfaces the data readiness gaps identified as the single largest deal killer earlier in the analysis, giving Salesforce time to address them rather than discover them mid-deployment. Every enterprise consideration-stage deal should be assigned a Technical Pre-Sales Architect who assesses the buyer's data environment and produces a concrete integration roadmap before commercial discussions advance. A dedicated Digital Labor Evangelist role, separate from AEs, should run awareness workshops and sandbox sessions before any commercial conversation, protecting AE capacity for deal closing while giving the top of the funnel a dedicated owner.

When the commercial conversation begins, AEs should lead with a Chatbot Differentiation Playbook built around Salesforce's own Customer Zero deployment data. Internal proof points carry weight that third-party case studies cannot, particularly for buyers carrying chatbot-era skepticism into the conversation. A standardized Trust Certification Package combining Einstein Trust Layer specifications, data masking protocols, zero data retention commitments, and compliance certifications should be deployable immediately, eliminating bespoke legal reviews for every deal and accelerating procurement timelines. For SMB, the same readiness logic applies in compressed form: a self-service readiness assessment embedded in the product and surfaced at trial activation, supported by a lighter-touch version of the Trust Certification Package appropriate to smaller deals.

3.2 Priority Two: Rebuild the Sales Organization Around Consumption Growth

The compensation redesign carries this priority. Tying a defined portion of AE variable pay to consumption growth within existing accounts is the change without which nothing else in this priority works. The training, supervision, and narrative recommendations that follow are accelerants, not substitutes.

Salesforce's \$13.257 billion sales and marketing investment in FY25 means the gap between what the sales force is built to do and what Agentforce requires is not a marginal problem. It is a drag on the return of Salesforce's entire commercial infrastructure. The sales organization realignment is therefore a strategic imperative for the company's most important product launch in years.

A defined percentage of AE commission, a reasonable starting point being 25 to 35 percent of variable pay, should be tied to consumption growth within existing accounts over a rolling twelve-month window. The rolling-window design is critical: it prevents reps from being penalized for one-quarter consumption volatility driven by factors outside their control (ex. customer seasonality and model cost changes), while still creating a durable financial incentive to stay engaged after the close. Quota relief should be available in territories where realized unit economics diverge meaningfully from plan assumptions, an explicit acknowledgment that consumption revenue is partially exogenous to the rep's effort.

Transition risk is the largest implementation concern. Tying 25 to 35 percent of variable comp to a metric that reps have never been measured on materially reduces what current top performers earn during year one of the redesign, creating attrition risk during exactly the period Salesforce needs its best reps engaged. The recommendation is therefore a phased, two-year rollout. Year one runs both compensation models in parallel, with reps earning the higher of the two. Year two transitions fully to the consumption-weighted model, with floor protections for AEs whose accounts have structural consumption headwinds. This sequencing preserves the organizational stability the enterprise motion depends on while still aligning incentives over a defensible timeline.

The skills required to sell Agentforce differ from those required to sell Sales Cloud or Service Cloud. Salesforce should pursue a two-pronged skills strategy: targeted upskilling of existing enterprise reps on AI workflow literacy, pilot scoping, and business case construction, combined with selective external recruiting of salespeople with backgrounds in enterprise AI and digital transformation consulting. A structured ROI co-creation process should become standard practice at the consideration stage, with AEs running joint sessions with the buyer's operations and finance teams to build a custom business case from the buyer's own data rather than relying on pre-built case studies from companies with different data environments. This transforms the pitch into a joint business case and gives internal champions the financial justification they need to move the deal through procurement.

Sales managers must shift their supervisory approach from monitoring deal size and renewal rates toward field-based diagnostic coaching that identifies where individual reps are struggling in the buyer journey. A standardized customer success manager (CSM) playbook should map the most common expansion pathways from a customer's first agent deployment to their second and third use cases, organized by industry and function, giving account teams a clear recommended next step at the 90-day mark rather than waiting for customer-driven expansion. An internal Consumption Health Score Dashboard should flag accounts with flat or declining agent usage and recommend targeted expansion conversations before the account becomes a churn risk.

Salesforce's internal narrative around Agentforce must resolve the organizational anxiety the analysis identified. The recent customer support layoffs have created a credibility problem inside the sales force. Following the model of Salesforce's own internal deployment, where frontline managers rather than IT teams were made the owners of Agentforce agents, the same logic must be applied to the sales organization. Agentforce should be positioned as a tool that elevates the enterprise seller's strategic value, freeing them to operate at a higher level of consultative engagement, rather than a signal of the seller's eventual displacement.

3.3 Priority Three: Align Pricing, Contracting, and Channel Incentives Around Consumption

Two recommendations carry this priority: a Pilot-to-Scale Contract Template that becomes the standard enterprise commercial structure, and a trailing consumption override that replaces the current GSI referral fee. Together they realign procurement on the buy side and channel economics on the partner side. Everything else in this priority supports those two moves.

Consumption-based pricing makes strategic sense for Agentforce, but it is exactly the commercial model enterprise procurement is least equipped to evaluate. The channel economics that underpinned the pre-Agentforce era points in a different direction from what consumption-based adoption requires. Fixing this requires coordinated changes to the pricing architecture, the sales enablement that wraps around it, and the partner incentive structure that extends it.

Pricing Architecture

Salesforce should publish an Action-Tier Credit Schedule within the Flex Credits framework that distinguishes informational actions (ex. record lookups and FAQ responses) from transactional actions (ex. case resolution and record updates) from revenue-generating actions (ex. qualified lead handoff and completed upsell). This preserves credit simplicity while letting price reflect the actual business value delivered, addressing the core objection that a

single flat rate cannot simultaneously accommodate a basic wayfinding agent and a revenue-generating sales agent. Every enterprise renewal conversation should open with a Flex Agreement structure that gives the customer a pool of seats and a pool of credits with the right to convert between them mid-term. This reframes Agentforce adoption as a reallocation of existing spend rather than a net-new purchase, which dramatically reduces procurement resistance. The Digital Wallet should be upgraded to a procurement-grade tool with departmental budget caps, alert thresholds at defined utilization levels, shortfall protection, and demand forecasting. A CFO who can set a quarterly cap on a department's agent spend with automated alerts will treat consumption pricing as a control mechanism rather than a runaway financial risk.

AEs should be trained to lead pricing conversations with outcomes rather than units, specifically cost per resolved case or cost per qualified lead, keeping the meter credit-based while making the buyer conversation value-based. A Pilot-to-Scale Contract Template should become the standard commercial structure for enterprise deals: a time-limited pilot with agreed success metrics that automatically converts to scaled deployment on hitting those metrics. This gives procurement a fixed initial spend they can approve while embedding the expansion pathway into the agreement from day one. For enterprise deals above a defined threshold, a dedicated Deal Desk Specialist should shepherd consumption-based contracts through the buyer's procurement process, acting as a commercial translator between Salesforce's pricing model and the buyer's existing approval infrastructure.

Channel Economics

The FDE Partner Network launched with Accenture, Deloitte, and IBM in April 2026 is a structural step in the right direction, but the underlying incentive misalignment identified in Section 2.5 (GSI fee pools grow linearly with implementation complexity, while Salesforce's commercial interest lies in consumption growing independent of services hours) requires explicit economic resolution, not just structural recognition. The recommendation is to replace the current one-time referral fee model with a trailing consumption override: partners in the FDE tier should earn 2 to 5 percent of realized consumption revenue from accounts they implemented, paid monthly over a 24-month period following go-live. This shifts the partner's economic interest from maximizing implementation hours to accelerating customer time-to-production-consumption, aligning their incentives with Salesforce's. The override structure should be tiered: higher percentages for FDE-certified partners, lower for standard partners, with the differential funded by the implementation efficiency the marketplace generates. GSI-led implementations above a defined complexity threshold should come with a Salesforce FDE co-delivery requirement to ensure implementation quality does not degrade as timelines compress. Formal co-selling motions should be built with anchor partners across the AgentExchange ecosystem (hyperscalers Google Cloud and AWS; ISVs Box, DocuSign, Workday) around specific high-value use cases with shared lead lists, joint field events, and co-built reference architectures.

The Salesforce and Anthropic partnership represents a structural competitive advantage the commercial organization has not yet fully leveraged. Anthropic is the first large language model provider fully integrated within the Salesforce trust boundary, with Claude serving as the preferred model for Agentforce in regulated industries including financial services, healthcare, cybersecurity, and life sciences. All Claude model traffic runs inside Salesforce's virtual private cloud under Einstein Trust Layer governance, a capability that Microsoft's multi-model Copilot program does not replicate. Account executives in healthcare, financial services, and life sciences should be trained to lead enterprise conversations with this trust boundary argument, supported by reference customers such as RBC Wealth Management and CrowdStrike who are already running Claude inside Agentforce in production. This converts an existing partnership into a repeatable sales tool rather than a background capability most buyers never hear about.

3.4 Priority Four: Build a Consumption-Oriented After-Sales Service Function for SMB

The recommendation here is a scaled SMB customer success function built distinct from the enterprise Signature CSM service and delivered, in large part, through Agentforce itself. Without it, the SMB revenue projections in Priority One do not materialize.

Under the subscription model, Salesforce's post-sale responsibility was essentially contractual. Revenue was locked in at signing, support was reactive, and renewal was managed at contract expiration. Under the consumption model, there is no contract expiration and no revenue floor. If an agent sits idle after deployment, revenue drops to zero with no commercial event to trigger a conversation. This changes the post-sale function from a support overhead cost into a direct revenue lever, and Salesforce's current customer success infrastructure is not designed to operate that way.

Salesforce does have a CSM function, but it is structured around enterprise accounts and delivered primarily through the premium Signature Success Plan,⁴⁸ which provides enterprise accounts with a designated CSM and proactive monitoring. That coverage requires premium spend SMB accounts cannot justify; SMB customers on Starter and Pro Suite receive the Standard Success Plan with no designated CSM. Salesforce has stated that its goal with SMB Agentforce adoption is to capture growing businesses on the platform and monetize consumption as they scale,⁴⁹ but that monetization logic only holds if someone is actively guiding SMB customers from their first agent deployment to their second and third use cases. Left to navigate Agentforce expansion independently, most SMBs will not. They lack the internal technical resources, the AI workflow literacy, and the organizational capacity to identify and build out new agent use cases without help. Enterprise customers have procurement teams, IT departments, and executive sponsors who can drive expansion internally; SMBs need Salesforce's customer success team to do that work for them.

The model has three components. First, a Post-Deployment Expansion Playbook should be built into the SMB CSM function, mapping the most common expansion pathways from a customer's first agent deployment to their second and third use cases, organized by industry and function. A customer who deployed a customer service agent should receive a proactive recommendation for a sales qualification agent at the 90-day mark, with a clear business case built from their own usage data. Second, the aforementioned Consumption Health Score Dashboard should generate automated alerts when agent usage is flat or declining below defined thresholds, triggering targeted outreach from the CSM team rather than waiting for the customer to raise a concern. Third, Salesforce should use Agentforce itself to power the scaled SMB CSM function, with AI agents handling routine check-ins, usage summaries, and expansion recommendations at a cost structure viable for the SMB segment. Deploying Agentforce internally to manage Agentforce customer success is not just a cost efficiency move. It is the most credible proof point Salesforce can offer to an SMB buyer skeptical about whether AI agents work in practice. The result is a customer success function that turns the consumption model's structural vulnerability, the absence of an automatic revenue floor, into a managed, proactive growth engine.

3.5 Success Metrics

Agentforce adoption rate among SMB and mid-market accounts is the leading indicator for Priority One. A target of 20 percent adoption within existing SMB customers within eighteen months would validate both the strategic direction and the revenue projections. The metric measures whether Salesforce is expanding into the digital labor market with the customer segment best positioned to demonstrate early value, without cannibalizing the enterprise book.

Post-close consumption growth rate, defined as the percentage of pilot deployments that expand to second and third agent use cases within 90 days, indicates whether Priority Two's compensation and supervision restructuring is changing sales behavior at the account level. Under the subscription model, post-close engagement was optional. Under the consumption model, it is the mechanism through which revenue compounds. A consistent 90-day expansion rate above 30 percent would signal the redesign is working.

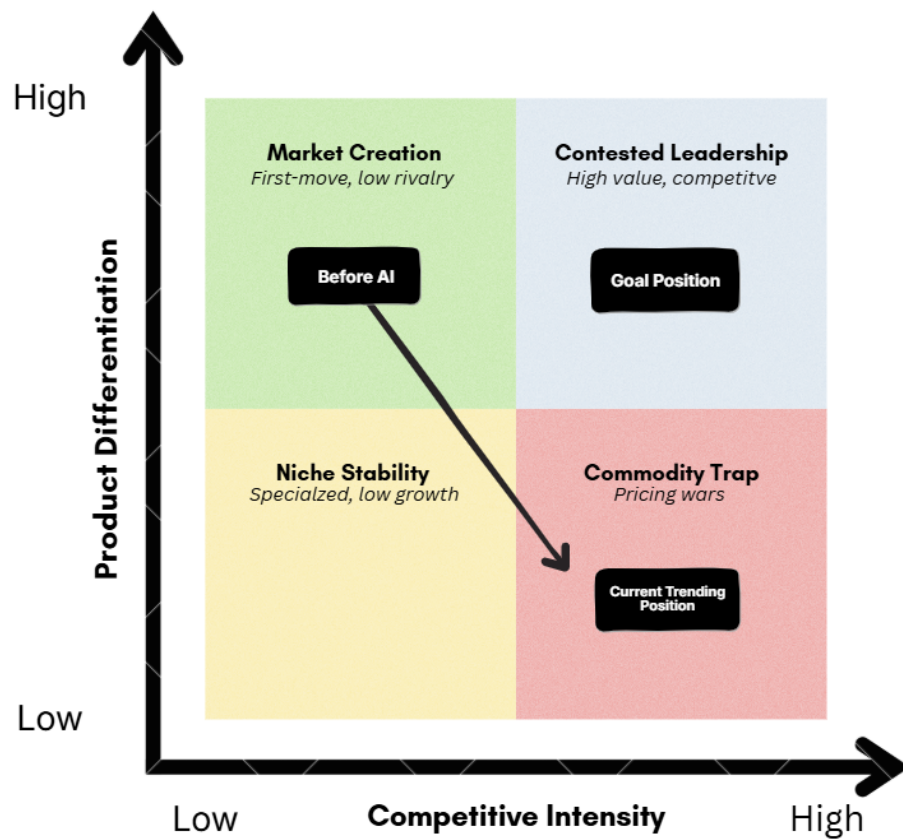
Partner-influenced consumption growth as a percentage of total Agentforce ARR measures whether Priority Three's channel restructuring is turning implementation partners into long-term expansion partners. The metric captures

whether the FDE Partner Network, the trailing consumption override, and the co-selling motions with anchor partners are generating compounding value in existing accounts rather than delivering one-time implementation engagements.

Together these three metrics turn the report's central question into something Salesforce can actually measure.

Exhibit 1: Strategic Positioning Framework

Product differentiation (vertical axis) vs. competitive intensity (horizontal axis). Salesforce CRM (“Before AI”) is moving from the market creation quadrant toward the commodity trap quadrant along the CRM commoditization path. Agentforce represents a strategic reset toward the contested leadership quadrant (“Goal Position”): high product differentiation sustained within an intensifying competitive field.



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