Newsroom | Workday

Salesforce and Workday Form Strategic Partnership, Unveil New AI Employee Service Agent

Partnership will deliver a personalized, AI-powered assistant for employee service use cases such as onboarding, health benefits, and career development within Salesforce and Workday

The two companies will establish a common data foundation that unifies HR and financial data from Workday with CRM data from Salesforce, enabling AI-powered use cases that boost productivity, lower costs, and improve the employee experience

Workday will be natively integrated inside of Slack with deeper automation, so employees can seamlessly collaborate around worker, job, candidate, and similar records using AI

SAN FRANCISCO and PLEASANTON, Calif. — July 24, 2024 — Salesforce (NYSE: CRM), the #1AI CRM, and Workday, Inc. (NASDAQ: WDAY), a leading provider of solutions to help organizations manage their people and money, today announced plans for a new AI employee service agent that will automate time-consuming tasks, provide personalized support, and surface data-driven insights that help employees work smarter and faster.

The combination of Salesforce's new Agentforce Platform and EinsteinAI with the Workday platform and Workday AI will enable organizations to create and manage agents for a variety of employee service use cases. This AI agent will work with and elevate humans to drive employee and customer success across the business. Powered by a company's Salesforce CRM data and Workday financial and HR data, the new AI employee service agents have a shared, trusted data foundation to communicate with employees in natural language, with human-like comprehension. As a result, taking action as part of onboarding, health benefit changes, career development, and other tasks will be easier than ever.

When complex cases arise, the AI employee service agent will seamlessly transfer to the right individual for remediation, maintaining all the previous history and context for a smooth hand-off. This unique approach of humans and AI seamlessly working together will result in greater productivity, efficiency, and better experiences for employees. This is only possible by having the data, AI models, and apps deeply integrated.

"The AI opportunity for every company lies in augmenting their employees and delivering incredible customer experiences," said Marc Benioff, Chair and CEO, Salesforce. "That's why we're so excited about our new Agentforce platform which enables humans and AI to drive customer success together, and this new partnership with Workday, to jointly build an employee service agent. Together we'll help businesses create amazing experiences powered by generative and autonomous AI, so every employee can get answers, learn new skills, solve problems, and take action quickly and efficiently."

"Employees, customers, and financials are the three most fundamental elements of any business," said Carl Eschenbach, chief executive officer, Workday. "By integrating our platforms, datasets, and powerful AI capabilities, Salesforce and Workday are empowering our customers to deliver unmatched AI-powered employee experiences that ultimately lead to happier customers and drive unprecedented business value."

This new strategic partnership will bring together the two most widely used cloud platforms in business to transform work and create new employee experiences powered by generative AI. The partnership will deliver:

- **AI employee service agent powered by Einstein 1 Platform and Workday AI:** Salesforce and Workday will integrate Einstein's agent platform with Workday AI, bringing the power of two generative AI solutions into one seamless employee experience accessible across Salesforce and Workday. The AI employee service agent uses LLMs to communicate in natural language, and leverages a powerful shared data foundation to deliver relevant, conversational responses to employee queries. Keeping the employee at the center, the agent will recommend and act across platforms on behalf of the employee — helping them be more productive and efficient. For complicated high-touch issues, requiring escalation to a human, the agent will seamlessly and quickly perform the escalation and hand-offs.
- **Shared data foundation built on Salesforce Data Cloud and Workday:** Salesforce and Workday will have one shared data foundation connecting Workday financial and HR data with Salesforce CRM data. To make that possible, Workday will leverage the Salesforce Zero Copy Partner Network. This will allow customers to access and action financial, HR, and CRM data across Salesforce and Workday platforms without having to duplicate data or build custom integrations, all while ensuring secure data sharing so users only see authorized information.
- **Seamless integration between Workday and Slack:** Workday will enhance its existing integration with Slack, providing an elevated conversational interface for users to access and collaborate around Workday financial and HR records, such as tasks, pay, job requisitions, employee details, and general ledgers, directly in Slack. Slack preserves the conversations about these records, which will allow information to be easily found, summarized, and acted upon in Workday at any time.

Benefits to Employees

Through natural language conversations, employees can get instant support from their AI employee service agent — whether working in Salesforce, Slack or Workday. It will provide contextual assistance by understanding requests, retrieving relevant

knowledge and insights from unified Workday-Salesforce data sources, then automating resolution across platforms.

- **Seamless Onboarding:** Coordinating paperwork, resource provisioning, training, and getting new hires ramped up faster.
- **Self-Service HR:** Answering questions related to PTO, benefits, policies, and enabling self-service transactions like updating healthcare plans.
- **Continuous Development:** Curating personalized learning paths based on an employee's role, skills, and career interests tracked in Workday.

"As a leading global commercial real estate services firm, we are relentless in our pursuit to optimize our employee experience and connected digital footprint, which helps our clients to drive forward," said Sal Companieh, Chief Digital and Information Officer, Cushman & Wakefield. "The ability to streamline workflows across two of our most used platforms – Workday and Salesforce through this newly announced partnership will accelerate our ability to bring personalized AI powered digital experiences to life.

Benefits to Employers

By fusing HR, financial, and operational data into advanced AI models, Salesforce and Workday are extending workforce capability beyond individual employee productivity and elevating overall workforce intelligence, optimization, and resilience:

- **Precision Workforce Planning:** Harmonize skills supply forecasts from Workday with demand signals from Salesforce for accurate capacity planning.
- **Continuous Financial Planning:** Feed unified employee and customer data into rolling forecasts, scenario modeling, and operational analyses.
- **Intelligent Sales Enablement:** Guide sellers through complex deals by analyzing historical activity and recommending targeted coaching.

"The integration of business processes and data is one of the top concerns among C-level execs in an age of AI. Companies will be hard pressed to find any one vendor or partnership that can offer visibility across customer, employee, and financial data – until now," said R "Ray" Wang, CEO, Constellation Research, Inc. "The shared data foundation between Workday and Salesforce will enable these partners to deliver AI capabilities that could completely transform the employee experience to be more personalized, efficient, and impactful – translating to increased business performance across the board."

More information:

- Learn more about Salesforce's Zero Copy Partner Network
- Learn more about Einstein Service Agent
- Say hello to Data Cloud
- Get more information on Slack, the AI-powered platform for work
- Learn about Workday Everywhere, the existing Workday Slack integration
- Read more about Workday AI

Any unreleased services or features referenced here are not currently available and may not be delivered on time or at all. Customers should make their purchase decisions based upon features that are currently available.

About Salesforce

Salesforce is the #1 AI CRM, empowering companies to connect with their customers in a whole new way through the power of CRM + AI + Data + Trust on one unified platform: Einstein 1. For more information visit: www.salesforce.com.

About Workday

Workday is a leading enterprise platform that helps organizations manage their most important assets – theirpeople and money. The Workday platform is built with AI at the core to help customers elevate people, supercharge work, and move their business forever forward. Workday is used by more than 10,500 organizations around the world and across industries – from medium-sized businesses to more than 60% of the Fortune 500. For more information about Workday, visit workday.com.

To view original release, visit here.

---

https://newsroom.workday.com/2024-07-24-Salesforce-and-Workday-Form-Strategic-Partnership,-Unveil-New-AI-Employee-Service-Agent