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Salesforce's timely shift to AI agents drives up value, investor optimism

Article

The news: **Salesforce's** stock has surged 30% since it unveiled **Agentforce** at **Dreamforce** in September. Investor optimism for technology that can automate roles in customer service, sales, and marketing is paying off in the short term.

However, it's still too early to determine if the excitement over AI agents reflects their long-term value to businesses.

As AI advances from simple chatbots to mission-critical tools like AI agents, businesses and investors are showing renewed optimism—though their confidence may outpace the technology's current capabilities.

AI hype versus ROI: Salesforce's AI agents have received strong initial feedback—the company's 150,000-firm client list is a captive market for running AI tools and automations at scale.

- The surge in Salesforce's stock value, as well as interest in AI's business application, bodes well for competitors like **OpenAI**, **Microsoft**, **CrewAI**, and **Zendesk**, who are equally invested in AI agents despite having much smaller customer bases.
- "Agentforce, while a critical development, is unlikely to materially move the needle on revenue growth for about a year," said **JPMorgan** analyst **Mark Murphy**, per Bloomberg.

The challenge: While AI agents sound attractive to businesses looking at reduced headcount and increased profits, customers aren't too keen on dealing with agents.

- For customer service specifically, nearly two-thirds, or **64%, of consumers would prefer that companies not use AI for customer service**, per a Gartner survey.
- Notably, 53% would consider switching to a competitor if a business adopted AI for customer service.

Key takeaway: Companies employing AI agents might need to reeducate consumers on the benefits of these tools in service and sales. Additionally, they should balance their automation goals with user preferences to avoid alienating customers.

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