



Expanding what's possible in customer advocacy

ReferenceEdgeAI brings the data, workflows, automation, and domain knowledge of ReferenceEdge to the AI and collaboration tools people already use.

It is not a separate AI application or a single integration. ReferenceEdgeAI encompasses multiple ways organizations can make ReferenceEdge accessible through AI, including the **ReferenceEdge MCP**, **Salesforce Agentforce**, **Microsoft Copilot**, **ChatGPT**, **Claude**, **Microsoft Teams**, and **Slack**.

Whichever access point your organization chooses, the principle is the same:

Let AI understand the intent. Let ReferenceEdge execute the work.

That combination brings the flexibility of conversational AI together with the reliability of deterministic software.



One foundation. Multiple ways in.

“Why should you ever log into Salesforce again?”



Parker Harris
Salesforce Co-Founder

ReferenceEdgeAI allows organizations to choose the AI experiences that fit their technology strategy and their users.

ReferenceEdge MCP

Allows users to interact conversationally with ReferenceEdge through tools such as Microsoft Copilot, Claude, and ChatGPT.

The ReferenceEdge MCP provides a secure Salesforce access layer (OAuth) through which authorized AI and external applications can invoke ReferenceEdge capabilities without requiring users to work directly in the Salesforce interface.

Salesforce Agentforce

Organizations invested in Salesforce AI can incorporate ReferenceEdge data and capabilities into Agentforce experiences.

Collaboration tools

ReferenceEdge capabilities can be made available directly within Microsoft Teams and Slack, bringing customer advocacy into environments where users already work.

These are different doors into the same customer advocacy platform. The interface can change. The underlying data, business rules, and workflows do not.



The important part is what happens after the prompt

Consider a seemingly simple request:

“Find me three customers for a reference call for this opportunity.”

Understanding the sentence is the easy part.

Executing it correctly may require evaluating products, industries, roles, relationships, advocate status, previous activity, availability, program rules, cautions, approvals, and other criteria.

A general-purpose AI model could be asked to reason through all of that.

But ReferenceEdge already knows how to do it. For more than two decades, customer advocacy domain knowledge has been built into ReferenceEdge through structured data, search and matching logic, business rules, automation, governance, and workflows.

ReferenceEdgeAI lets AI use those capabilities rather than attempting to recreate them.

AI handles conversation, intent, reasoning, and unstructured information. ReferenceEdge handles the processes that should be predictable.



Why deterministic execution matters

AI is extraordinarily good at interpreting language and navigating ambiguity. It is less suited to repeatedly executing processes where the correct steps and business rules are already known. ReferenceEdgeAI combines both approaches.

Greater reliability

Established ReferenceEdge workflows behave predictably rather than relying on an AI model to reconstruct a business process each time it is needed.

Better accuracy

The AI can invoke application capabilities that already embody customer advocacy rules, reducing opportunities to omit steps, misinterpret program logic, or invent a process.

Faster execution

Filtering, matching, record creation, workflow execution, notifications, and other deterministic operations can be performed directly by ReferenceEdge rather than reasoned through step by step by an LLM.

Lower token consumption

AI reasoning consumes tokens. ReferenceEdgeAI avoids spending tokens repeatedly reasoning through processes that existing software can execute more efficiently.

In short: don't spend AI on work that doesn't require AI.



✦ Conversational access. Enterprise governance.

ReferenceEdgeAI expands how users can interact with ReferenceEdge without creating a parallel customer advocacy system.

ReferenceEdge remains Salesforce-native, with customer advocacy data residing within the customer's Salesforce organization. Access continues to follow the organization's Salesforce configuration, including applicable authentication, roles, permission sets, sharing rules, and other platform controls.

Through ReferenceEdgeAI, organizations can make specific ReferenceEdge capabilities available to authorized AI and collaboration environments while ReferenceEdge remains the operational system responsible for customer data, program rules, workflows, governance, activity, and outcomes.

The goal is not to create a side door around Salesforce. It is to provide additional, governed doors into ReferenceEdge.

✦ Built for an AI landscape that won't sit still

Today's preferred AI experience might be Copilot, Claude, ChatGPT, Agentforce, Teams, or Slack. Tomorrow's may be something entirely different.

ReferenceEdgeAI separates that rapidly changing interface layer from the durable customer advocacy foundation beneath it.

ACCESS

Copilot • Claude • ChatGPT • Teams • Slack • Agentforce • other authorized AI applications

REFERENCEEDGEAI

ReferenceEdge MCP / Salesforce Headless 360 • AI guidance • secure access • capability routing

REFERENCEEDGE

Customer data • deterministic workflows • automation • search & matching • requests • nominations • approvals • governance • activity & outcomes

That architecture allows organizations to adopt new AI experiences without rebuilding the customer advocacy processes behind them.

✦ The advantage isn't AI alone

AI models are becoming broadly available. Increasingly, the differentiator is not simply having access to AI. It is **what the AI has access to and what it can reliably do**.

ReferenceEdgeAI connects general-purpose AI with something those models do not inherently possess: trusted customer advocacy data, purpose-built workflows, deterministic automation, and more than two decades of customer advocacy domain experience embodied in ReferenceEdge.

ReferenceEdgeAI doesn't ask AI to become ReferenceEdge. It gives AI access to ReferenceEdge.