



HL INFLUENCERS: DIGITAL TRANSFORMATION TRANSCRIPT

EDWARD BRITAN
SALESFORCE

Leopold von Gerlach	Hello everybody and welcome to another edition of <i>The Influencers</i> , our podcast conversation on digital transformation and law. I'm Leo von Gerlach and with me today is Edward Britan. Ed is a Senior Vice President at Salesforce and leads Salesforce Global Privacy and Marketing Legal Team, which puts him on one of the hottest seats of a company that has become almost a synonym for the digital transformation of whole industries. So, Ed, it's terrific to have you on the show.
Edward Britan	Thank you so much. It's great to be here. Very happy to speak about global privacy to anyone that's willing to listen. Lord knows my family has heard it enough, so it's great to talk to an audience that's going to be receptive.
Leopold von Gerlach	Wonderful, Ed. So, as I said, you lead Salesforce Global Privacy and Marketing Legal Team at a time when privacy spans a sphere of very, very different areas, like data, AI, digital technologies and a number of neighboring aspects. So, within that big ocean, just tell us what are you focusing on at the moment? What is at the center of your attention?
Edward Britan	<p>It's all about AI and especially about agents and our automated agents. That's what we're selling. It's what we're putting into all of our products. And privacy has never been more important. It's never been more exciting to be in privacy because everything now is about data. Data is so critical to trust and it's so critical to performance. The better you understand your data and know your data, the better outputs you'll get from that data through AI agents but also trusting your service providers is so critical especially when it comes to AI.</p> <p>Customers aren't going to use AI with service providers they don't trust, so it's very similar to, you know, how I was working on in tech during the cloud revolution and I remember how difficult it was, but fun to convince customers that they could trust us with their data in the cloud. And now we're having to have the same sorts of trust conversations around AI and agents and innovation, and trusting us to be your provider. Customers are going to need to make this move. It's where the world has gone and to be successful in business, we all have to learn how to use this technology and use it effectively and so it's not a matter of if they're going to use it, but who</p>

	they're going to use it with. And my job is to get them comfortable with using our technology.
Leopold von Gerlach	So in this field of AI it's data, the quality of data in particular that of course relates to a number of different branches and units within Salesforce itself. Just explain how all these different parts of Salesforce act in orchestration, act together in order to kind of make sense around this extremely valuable resource.
Edward Britan	It's an excellent point, and you know unlike privacy, which my team gets to own, and I get to make decisions on, AI is necessarily a team sport. There's so many considerations involved, whether it be security, ethical considerations, product considerations, a whole host of teams across the company need to come together and for me, I find that exciting because these are really important conversations. It's a team sport. You know, I used to play football and I love working as a team and I love having to have conversations and trying to figure out solutions to complicated problems together and figure out what the right balance is between safety, and security, and privacy, and for the business and IP. And so I enjoy it. It's a team sport. It makes it really messy and I think the importance is to have all these different stakeholders come together through a singular process so that we're not having our own security review plus privacy review, plus ethical review. We would have a singular AI governance process that we're all stakeholders in and all supports and incentives are aligned, but it's been really inspiring and fun to work on that with my colleagues across the company.
Leopold von Gerlach	So it's different stakeholders that need to come together and unite under a single uniform process? That is something kind of similar to what Salesforce customers also need to do, sometimes on a smaller scale perhaps. But what is that single uniform process? What are the recommendations you can derive from your own experience for all your customers who struggle with the same or similar problems?
Edward Britan	<p>At Salesforce we use AI Councils as the forcing function. With an AI Council that we all come together in, and that's a forcing function to bring interest together. Make our case, have conversations, and then make our case together to be executives as to what the right approach is. Every company has, since we're forcing function, that brings all the different interests together. But even if you're a small company, that doesn't have necessarily different people for all these different aspects, you have to put these different hats on. You have to think in these different ways and have people that have these different viewpoints and different lenses to look at you think about what's important for security, what's important from an ethical perspective, what's important from a privacy perspective.</p> <p>And I think the first step is to put things in writing. Oftentimes, you don't know what you think about something until you write it down. You think you know, but then once you actually put in writing, you better learn what your</p>

	<p>perspectives are. And I think the record keeping and analytics requirements, which are actually legal mandates in data protection law, and admittedly they're burdensome, but they're also incredibly helpful. I've found in my experience going through this process has gotten us to better results, not just from a privacy perspective, but from a business perspective, because we often uncover better ways to do things from a privacy perspective, that are also better for the business, you know, especially at my company where our business model is very much aligned with, as I spoke about, that we have to get customers trusting us. And so oftentimes it's better for privacy is also better for the business. And so it's really helpful to go through this analytics process together and put it in writing.</p>
Leopold von Gerlach	<p>This makes a lot of sense. So you identify different risks. You allocate risks to different stakeholders, different teams, and then I think you pivot around a process that brings them all together and once that is clarified, it needs to be put in writing and that basically brings you a big step forward into the direction of compliance and governance. Let's make a jump to that fear of compliance and regulatory oversight.</p> <p>Salesforce makes a point in putting themselves under the most stringent regimes and most stringent regulators, just for example, in the European Union, you've put yourself under the wings of the CNIL in France, which has a reputation of being, particularly oversight, full in a sense, and that is, I assume, to make a point of living up to all the standards that may be around and have a process in place that is just robust enough to withstand it.</p>
Edward Britan	<p>Absolutely and going back to the documentation point as well, I'd say like a lot of customers are concerned that that's going to increase their liability, they put more things in writing because it gives a larger paper trail, more surface area for them to be criticized on. But in my experience, especially in dealing with the CNIL who you mentioned, you know, there's a lot of difficult decisions that have to be made when it comes to AI and new innovation. It's so much better to approach the CNIL with our explanation of why we did what we did and why we thought we did it in good faith and thought it was the right answer and then, if the CNIL disagrees with us, we can change course, but it's so much better to come to the CNIL with that open posture and reasonable explanation of why we're doing what we're doing than to come to them without all that thought in writing.</p> <p>We chose the CNIL, there's no hiding from the CNIL, they investigate a lot of companies, even those that don't have France as their main establishment. But as you know, that's kind of a strategic decision for us because trust is our business model. We didn't just do it to validate that we could be trusted, but also because we should learn a lot from working with the CNIL. We want to provide the best services from the trust and privacy perspective that we can and the CNIL wants that, too. So our incentives are aligned and it's really helpful the expert opinions and views toward the</p>

	<p>future, particularly as folks have seen the CNIL, is very much out in front on AI and use of data in AI and that sort of guidance from the CNIL is essential for enabling us to build with the future in mind, effectively for our customers.</p> <p>So yeah, in particular, there's that CNIL guidance on data used to in AI systems. There's really strict guidance and also really much highlighted the points of recordkeeping and analysis, but it was also pragmatic and implementable. And that's kind of the CNIL style. I think the CNIL recognized they can't lean on AI, but putting out rules that are crushing innovation, there's paths forward and I would encourage customers to pay attention to their regulators and work with them to build the highest compliance bar that makes sense for their business and for their program.</p>
Leopold von Gerlach	<p>Salesforce just announced Agentforce -- free driving AI agency into industries into the business. Tell us, what are the first lessons you learned there and what keeps your department particularly busy when it comes to thinking through the regulation and the governance of AI agents?</p>
Edward Britan	<p>Yeah, I see mostly as a privacy minded person. I see a lot of positives around agents. I see how they can help affect trade data minimization. I see how they can increase data protection. I see how they can minimize the risk of incidents, less humanize on data is often better. Most incidence I've encountered in my career have been human caused and so, you know, agents are going to put our services even more in the control of the customer, requiring less outside human engagement. So this is exciting and this makes privacy and data governance all the more important because also the better you organize your data, the better the agents will be, and so and also the better you organize the data, the more responsibly you can process the data and protect the data.</p> <p>So I think that these incentives are very much in mind and we're going to maximize the meaning and value of data with agents and that's going to enable customers to be maximally effective and protective. I'm really excited and that's something we're focusing on and I think some of the regulars are focused on as well and you know the CNIL which we mentioned earlier in their guidance on use of the air systems, they recognize that agents are less privacy impactful in many ways can be beneficial and use that as an example of a type of system that you can run data through without necessarily having to get consent. I see agents as a really positive path forward.</p>
Leopold von Gerlach	<p>Sounds almost like a reciprocal relationship where you learn about the processes by programming and training the agents and then going into a spiral that is improving the processes and the compliance of the agents themselves. That's fascinating. And perhaps just applying that to your own department, is there anything where you say, well, we have already used</p>

	the learnings from that agency correspondence conversation for our own processes in your privacy department?
Edward Britan	<p>Absolutely. And it's incredibly exciting as you point out, once you understand the power, the agents can help you not just protect data, but they can help you run a privacy program. And so customers throughout the years, have, they get nervous when I talk to them about how much resource we put into our privacy programs, maybe they can't hire, you know, 100 people across the business to do privacy, but they can have 100 agents constantly evaluating the data, constantly giving recommendations, constantly trying to improve their privacy posture. And that's really powerful.</p> <p>And so in terms of our program, it's something we're doing to scale as well, because you're always envious of what other companies have and other companies have even bigger privacy programs than we have. And so with agents I can scale without having to make a budget request to the C-Suite. And so it's something we've all had to learn to use this technology. It takes some time and some investment in time on the front-end because for the agents to be effective and help us run the program, we really need that corpus of data for the agents to run on. And so we spent time updating white papers, making sure they're accurate.</p> <p>Seeing all the source material of agents run on, but now we're seeing huge improvements in terms of efficiency, reduced burnout and our ability to have lawyers focus on things that lawyers should be focusing on. Which is strategic complicated issues and the highest value issues. This is good for the company, but it's also good for people because I've seen my people, you know, they've always wanted to do the work that's most interesting. That's what they're attracted to, but historically, in a privacy program there is a lot of back review, you know mundane tasks, updating our policy statements. And once you get the agents working for you, they can really make those mundane routine tasks much more efficient.</p>
Leopold von Gerlach	<p>While that touches on a very important point. So you're not speaking about one agent, but you mentioned several agents that you may employ and that raises a number of questions, including how these agents may interact with one another and at some point it may get pretty complicated because you may have inter-agent communication. You have communication between agents and those who deploy them. Thinking this all through, whether you see the biggest roadblocks for perhaps Salesforce themselves, but also for your customers in making this compliantly and well governed work so that you have that fleet and it's kind of smoothly operating without any significant risks materializing.</p>
Edward Britan	<p>Three things come to mind, and the first would be guardrails for the agents. You know, agents are entirely under the customers control, but they'll only give it as good as the customers and see if they'll put time and thought into what you want the agents to be doing and what you don't</p>

	<p>think the agents should be doing. What are the tasks that are most appropriate for agents. Where can the agents provide the most efficiency. So that requires a little bit of the philosophy or, you know, requires human judgment to figure out how to deploy the agents, what guardrails to put in place, what data you want the agents to access and what data it doesn't make sense for the agents to access. And so that's the first thing is putting the right guardrails in place to ensure the agents are doing what you want them to be doing and nothing more. And maintaining complete control over the agents.</p> <p>Number two would be the data. The agents are only going to be as good as the data you provide them. So you know this is probably the biggest guardrail, if you're sure your data is good, good data equals good AI and good agents, so I think everyone needs to invest in trying to put down in writing, which is similar to what I talked earlier, because that's what agents can write. What is in writing agents can learn and see if they take a little bit more time on the front-end to put out policy standards, instructions and explanation of how your program should run. It can't just all be kept in people's heads any longer, because the agents can't understand that you need to document what you're doing. And ensure that all your white papers and everything you and the agents run on are up to date and accurate. And then number three have to invest in your human workforce for both of those tasks.</p> <p>There's a lot agents can do, but it's going to be the very routine stuff that's not necessary for humans to be doing. You need to have really sophisticated human employees that can manage these agents effectively and understand how that works, understand processes. At Salesforce we just hired a chief simplification and a justification officer who's going to help us to identify the right way. And he's someone that's built these things at scale at large organizations and has that experience and I think companies are all going to at varying levels have to look to hiring people that understand how to manage these things and run them effectively and it's going to require a whole new workforce for that.</p>
Leopold von Gerlach	<p>So that basically means for me understanding agent-human, agent-agent relationships is something that becomes very, very relevant for each corporate worker and just thinking this a little bit further down the line perhaps, let's say five years, something like that. How much do you think will have that whole development transformed the way we work? How will that relationship look like into just what situation we are driving?</p>
Edward Britan	<p>I couldn't be more excited for the future. I enjoy work, but there's parts of work I've never enjoyed and as more than I enjoy work, I enjoy that family and my time with my family and I think we all do. So I think in the future, a lot of the repeatable tasks, the research gathering, fact running of the implementation work can be done by agents and that's going to free all us up to be more impactful, do more interesting work which will be more fulfilling at the job, but also to not have to work all the time on filling out, as</p>

	<p>it's an office space, the proverbial TPS reports, or whatever. You know the mundane tasks that we all have as part of our job now that we hate doing and really dread going to work to do. Hopefully we won't have to do that in the future. That's going to buy us time and we can focus on the skills that we humans make, demonstrating judgment, building relationships, being empathetic, accounting for human perception and emotion as we drive strategy based on all the signals that the agents are providing us with, those make better decisions as humans.</p> <p>I'm excited and I get that there's people that enjoy repeated tasks. There will still be opportunities for those sort of people in the world, but Salesforce you know we're intending to be trail blazers and AI and agents are going to enable us to do just that. To blaze new trails, do new things, things that haven't been done before. Achieve things that haven't been achieved before and that couldn't be more exciting to me. And I hope it's exciting for many other lawyers and professionals out there that we're going to be able to achieve things we've never achieved before and hopefully bring about a better quality of life.</p>
Leopold von Gerlach	And it has been at least extremely exciting listening to you, whatever the agent like future will look like. So thank you so much for this terrific insights about privacy, AI agents, the quality of data and so much more.
Edward Britan	Thank you.
Leopold von Gerlach	And of course. Thank you everybody for listening in and I hope you join us again for the next edition of The Influencers which will be coming up soon. Until then, take care. Goodbye.