

CASE MATERIAL

AI Customer Support — Post- Acquisition Research Companion

Companion edition | Not the original task input

Showcase Companion Material · Revised October 2026

Companion material prepared from the published presentation and speaker notes. It is not the original task input. Suggested task instructions are newly written, not historical prompts.

12-slide strategy review; evidence cutoff September 14, 2026.

Research question and provenance

Question: where can a new B2B SaaS entrant compete after Salesforce acquired Fin? The published recommendation is conditional go for gated workflow discovery and no-go for a horizontal helpdesk/agent launch. This companion summarizes the published case; it does not supply the original historical research package.

The acquisition is independently supported here by Salesforce's official September 10, 2026 completion announcement. Other buyer metrics and product profiles are reproduced from the published presentation, not independently benchmarked in this companion. Analytical scores, positioning and continuation thresholds are judgments/proposals, not observed performance.

Verified transaction and strategic interpretation

Salesforce announced on September 10, 2026 that it completed acquisition of Fin, formerly Intercom. The announcement describes Fin as a fast-to-deploy customer agent usable with existing helpdesks, alongside Agentforce's customizable enterprise platform. Official source: <https://www.salesforce.com/news/press-releases/2026/09/10/salesforce-completes-acquisition-of-fin/>.

The published case interprets this as one owner spanning packaged AI-native speed and enterprise data/workflow/distribution. It compares three product routes within two platform powers: Fin and Agentforce/Service Cloud under Salesforce, plus Zendesk. Acquisition completion does not prove complete product integration, future packaging, realized synergy or deployment parity. Keep those uncertainties visible.

Buyer jobs and directional evidence

Buyer jobs: rapid accurate progress; continuity without repeating context; verified completion and AI identity disclosure; controlled escalation for ambiguous/sensitive actions. The published case cites vendor-sponsored Zendesk CX Trends 2026 and Salesforce State of the AI Connected Customer for 81% wanting service continuity, 74% frustration at repetition and 72% valuing AI identity disclosure. Exact survey populations/wording require source-level review before reuse as general market facts.

The design implication is speed plus retained context and control, not answer speed alone. No new interviews, customer quotes or \$40K budget are added to the case.

Product routes, comparison and whitespace

Fin route: packaged AI-native deployment, outcome economics and cross-helpdesk use. Zendesk route: omnichannel operations, knowledge, workforce and governance. Agentforce/Service Cloud route: CRM context, data, customizable workflow, MuleSoft actions and enterprise controls/distribution. These are case-reported route emphases, not equal-condition tests.

The published relative comparison uses a 1–5 analytical profile across deployment speed, price predictability, governance, data context, workflow depth and suite breadth. Do not invent numeric radar values from visual estimates; the companion supplies qualitative reasoning only. Position maps are directional.

A specialist should seek deep bounded post-sale workflows rather than replace a horizontal helpdesk. Candidate jobs: billing/subscriptions, access/permissions, onboarding configuration and integration troubleshooting. Governance control layers and regulated packs are alternative opportunities, not validated demand. The case favors a mid-market B2B SaaS workflow wedge.

Minimum capability stack

Experience: cross-channel intake with identity disclosure/intent, continuous handoff carrying steps and next action, operator limits/pause/override. Orchestration: authenticate identity/permissions before action, policy routing between autonomous/confirm/escalate, execute and verify state. Trust: evidence trail of sources/tool calls/changes, replay/QA/harm alerts, completion/re-contact/CSAT evaluation.

Integrations may span helpdesk, CRM, billing, identity, product telemetry and incident systems, but the first pilot implements only what two bounded workflows require. This is proposed architecture, not an existing product claim. High-severity actions require boundaries, confirmation and safe stop.

Discovery sequence, gates and risks

Start with one ICP, two workflows and three design partners. Move to live traffic only when production deployment can occur within ≤ 14 days and write actions are controlled. Then prove verified completion, satisfaction, predictable cost and multi-customer repeatability before expansion. The 14-day threshold is proposed, not a measured industry benchmark.

Continue only with material workflow volume, production data/actions access, safe verified completion and repeatability without bespoke rebuild. Kill/reposition for low volume, bespoke integration, weak trust or incumbent parity. The case does not specify a six-week plan or dollar budget; leadership must define a time box, budget and owner rather than inserting unrelated numbers.

Risks: Salesforce bundling Fin/Service Cloud compresses speed/pricing differentiation; Zendesk absorbs specialist workflows; wrong refunds, permission/account changes limit autonomy; narrow service-heavy jobs fail to support standalone budget. These remain uncertainties, not forecasts.

Decision and reference correspondence

Authorize time-boxed discovery with one ICP, two workflows, three partners and live evidence. Require deployment, quality, economics and repeatability gates before platform funding. Vote go for discovery, no-go for broad investment.

Published pages 1–3: question/recommendation/transaction; 4: jobs; 5–7: routes/comparison/whitespace; 8: opportunities; 9: capability stack; 10: sequence; 11: risks; 12: approval. Source families: official Salesforce acquisition, Agentforce/pricing/investor materials; Fin product/outcomes/platform/reporting; Zendesk agents/pricing/Resolution Platform; and vendor-sponsored buyer research. The original detailed source ledger was not recovered here.