

In collaboration with the Markkula Center for  
Applied Ethics at Santa Clara University, USA



# Responsible Use of Technology: The Salesforce Case Study

WHITE PAPER

SEPTEMBER 2022



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# Foreword



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The responsible use of technology has become one of the most pressing issues of the Fourth Industrial Revolution. While innovation continuously brings great benefits to the world, it has also brought risks and harms. The good news is that the challenge of using technology responsibly – directing technology towards its best uses and away from its worst – is one that many are not only talking about but acting upon.

Amid this challenge, in 2018, the World Economic Forum launched its [Responsible Use of Technology project](#) to help bring the worlds of business, civil society and government together to work towards solutions that will benefit everyone. The project aims to provide leaders with practical tools to: 1) educate and train their employees to think more about responsible technology, 2) design their organization to promote more ethical behaviour and outcomes, and 3) design and develop more responsible technology products.

With these goals in mind, the project has taken a multi-pronged approach: conducting a survey of 99 Forum members and partners on the ethical cultures of their organizations, running multiple workshops led by major technology companies

to share and gather feedback on their ethics programmes, and publishing several papers, including [The Responsible Use of Technology](#), and, in partnership with the Markkula Center for Applied Ethics at Santa Clara University, [Ethics by Design: An organizational approach to responsible use of technology](#), and two prior case studies: the first on Microsoft and the second on IBM. These case studies share corporate knowledge in technology ethics and responsible technology and present a treasure trove of experience in steering corporate cultures towards more profound ethics efforts.

In this paper, we present Salesforce's experience developing its Office of Ethical and Humane Use of Technology. We wish to thank Salesforce for sharing the many details of how it deepened its commitments towards ethics, responsible technology and social benefit. It is our hope that the resources created by the Responsible Use of Technology project, and in particular this series of case studies, will inspire others to incorporate ethics into their own organizations and thereby lead to more ethical decisions, more responsible technology and ultimately a better world. We welcome other companies wishing to share their stories to join this series and contribute to this work.

# Introduction

There can be no doubt that the world is changing rapidly and that this rapid change is sparking challenges in many areas of human endeavour: international relations, government and politics, economics, education, healthcare, communications and media, transport and more. Much of this rapid change is due to the accelerated development of technologies with immense social impact: artificial intelligence being a prime example. With such rapid change, opportunities and risks appear, and without careful consideration, the risks can sometimes turn into real harms. Needless to say, if these harms could be prevented, societies would be better off, but what can be done to avoid these harms? One solution is to go right to the source, where new technologies are being researched, developed and distributed to the world – specifically, the organizations themselves.

This paper is the third in a series publicly presenting major technology companies' ethics and responsible technology efforts. [Microsoft](#) and [IBM](#) have participated, and now Salesforce is presenting their efforts. The report goes deep into the story of operationalizing technology ethics

within Salesforce, a company that, from the start, has prided itself on emphasizing ethics, inclusion, accessibility and making a positive impact but has still experienced a need to grow as the technology and surrounding society changed.

Through collaboration with Salesforce employees and an examination of many of their ethics resources, this paper reveals the process of transformation that took place at Salesforce and how the operationalization of ethics became institutionalized through the Office of Ethical and Humane Use of Technology.

The journey of improvement is never complete, and the field of corporate technology ethics is changing quickly. The purpose of these case studies is not to elevate these companies as unreachable paragons of virtue – indeed, in each case, it was a stumble that led each company towards further growth. Rather, the hope is that by sharing their experiences of making technology ethics “real” in their contexts, those shared experiences might help others who wish to engage in similar efforts.

1

# Building the Office of Ethical and Humane Use of Technology

Salesforce established a proactive, centralized office to manage ethical concerns in the design, development and use of technology.

## 1.1 Salesforce's company culture and core values

Founded in 1999, [Salesforce](#) is a cloud-based software company that enables organizations to take advantage of cloud, mobile, social, blockchain, voice and artificial intelligence technologies to connect to their customers. Since its founding, Salesforce leadership has sought to use the business as a platform for positive change. The founders intended to grow the business with values leading the way. Today, the five core values of trust, customer success, innovation, equality and sustainability (added in 2022) remain central to how the business envisions itself and its role in shaping technology.<sup>1</sup>

As the company grew, however, critical questions began to arise, both internally and externally. What is the role of technology in society? Who is empowered or harmed by the use of certain technologies? How can businesses genuinely listen to their stakeholders<sup>2</sup> (customers, employees, partners, communities, the planet and society) not just shareholders?

Salesforce faced problems requiring resources and action, in addition to values and good intentions. This led to the development of the Office of Ethical and Humane Use of Technology.

BOX 1

### The 1-1-1 model

Doing well and doing good have been emphasized at Salesforce from its inception. One early example of how values played a role in defining Salesforce's culture is the 1-1-1 model.<sup>3</sup> During its earliest days, the company's leaders decided to dedicate 1% of its time, product and resources to philanthropic causes. This initiated the Pledge 1% movement, which invites other businesses to make the same commitment.

Today, more than 15,000 companies worldwide have joined the Pledge 1% movement.<sup>4</sup> While 1% may not seem like much, the scale of participating

businesses enables this philanthropic effort to make an impact. At Salesforce alone, more than \$530 million in grants, 70 million hours of employee volunteering and donations to more than 54,000 nonprofits and educational institutions have come from the 1% commitment since the company was founded. Beyond that, over 10,000 members in 100 countries have used Pledge 1%'s framework to generate half a billion dollars in new philanthropy.<sup>5</sup> Additionally, the underlying value of pledging 1% builds a culture of social impact within companies, paving the way for more ambitious initiatives for positive change.



## 1.2 The Office of Ethical and Humane Use origin story

In 2018, the technology industry hit an inflection point.<sup>6</sup> Eroding trust in government institutions after revelations about the role of data in politics and business over the previous two years left the public looking to the private sector for answers – especially as regulatory direction frequently fell behind the capabilities of contemporary technology. With numerous questions and concerns from experts, employees and the public, visibility was at an all-time high. Companies like Salesforce had to confront issues like data security, political polarization and controversial government contracts. As the business world grappled with its response, values became important for high-level business decisions.

At the same time, consumers had more access to information about the businesses they supported and felt more empowered to hold them accountable for their actions. Stakeholders had concerns, and with them came expectations about how businesses behaved. When people spent their money, they wanted greater confidence that it went to businesses aligned with their values. Calls for action also came from the professional world, with employees expressing their concerns through protests, open letters and resignations.<sup>7</sup>

For Salesforce, one of the places this was most apparent was in the company's ongoing contract with the US Customs and Border Protection (CBP) federal agency. This agency was in the headlines

for policy decisions about family separation, harsh treatment of asylum seekers and its place in the broader apparatus of government use of force. A core group of Salesforce employees identified this contract as incompatible with some of the company's stated values and penned an open letter to CEO Marc Benioff.

"Given the inhumane separation of children from their parents currently taking place at the border," the letter read. "We believe that our core value of Equality is at stake and that Salesforce should re-examine our contractual relationship with CBP and speak out against its practices."<sup>8</sup>

It was a critical moment for the people who organized and signed the letter. One of the open letter authors, Emily Witt, recalled asking the company to examine how it uses all of its products, break down inequalities and create a foundation of care. As designers and researchers, Witt and the other authors recognized that technology design influences its use, advocating in their letter not only for Ethical Use Policies but Product Design and Development Processes as well.

With resources dedicated to that vision, the company's Ethical Use team is now working to build those foundations that will ensure ethical and inclusive practices are built into their products.

“ A core group of Salesforce employees identified [the US Customs and Border Protection] contract as incompatible with some of the company's stated values.

The letter highlighted Salesforce's employee interest in the company's impact on the world. Salesforce's relationship with government policy or policy implementation mattered to its employees; in this context, they actively made their position known.

Though not the first or last such issue that Salesforce would need to navigate, this was an important moment. With the employee letter as the catalyst, Benioff decided that the right move was not to play "ethics whack-a-mole" (a common way Benioff illustrated the challenge) by addressing individual issues as they impacted disparate areas of the business. Instead, it would be better to create a centralized office that could proactively identify emerging tech ethics trends and take action. With committed resources, this office could ensure employees felt empowered to continue playing an active role in Salesforce's decision-making and more broadly manage ethical concerns in the design, development and use of Salesforce technologies.

Benioff announced the formation of an Office of Ethical and Humane Use,<sup>9</sup> to be led by Salesforce's first-ever Chief Ethical and Humane Use Officer. This office was to be created within Salesforce's Office of Equality<sup>10</sup> and spearheaded by Chief Equality Officer, Tony Prophet.

With this direct line to the CEO, the team had broad insight into the business and influence at its highest level. Prophet was given the mandate to create a structure to ensure that Salesforce's technology was used to help, not harm, society and uphold the fundamental rights of every human being. Eventually, the company's ethics work was embedded into its product organization, where it lives today.

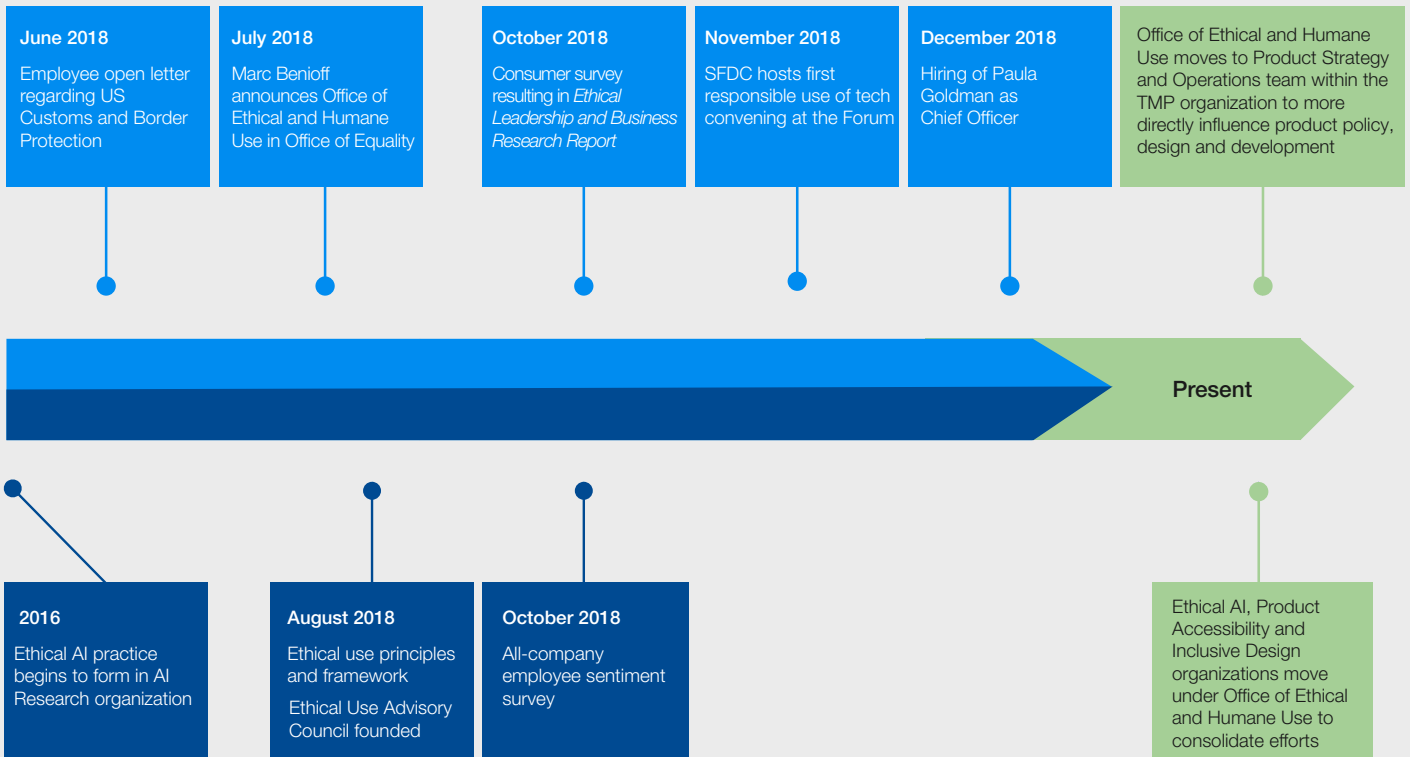
As part of this effort, the company took several key steps outlined in Figure 1.



**The ethical and humane use of technology in the Fourth Industrial Revolution is the way forward – not just for our industry but for humanity. We have to make sure that technology strengthens our societies instead of weakening them. Technology needs to improve the human condition, not undermine it.**

Marc Benioff, Chairman and Co-CEO, Salesforce<sup>11</sup>

FIGURE 1 Foundational and organizational timeline: 2018



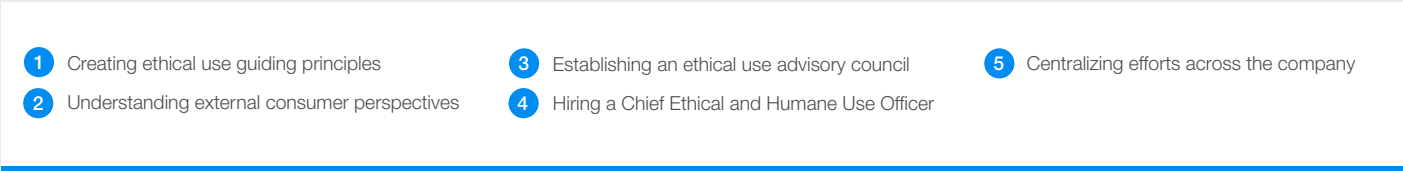
Source: World Economic Forum



We began as a small, scrappy team dedicated to making order out of ambiguity surrounding the role of tech in addressing ethical use issues. With great investments from Salesforce – a mandate from our CEO, visibility across our entire employee base, and direct contact with our Board of Directors – we focused on establishing foundational frameworks and strategies that could meet the needs of the moment and guide us as our work evolves over time. It was an amazing period of intense – and intentional – growth.

Christina Zhang, Senior Manager, Ethical and Inclusive Products, Salesforce

FIGURE 2 Five key steps



Salesforce's company core values are trust, customer success, innovation, equality and sustainability.

### 1. Creating ethical use guiding principles

Salesforce utilizes its values to guide and inform the decisions and actions it takes as a business. While the five company core values guide the Office of Ethical and Humane Use, its members recognized a need for an additional set of ethics-specific principles to build upon and supplement its core values.

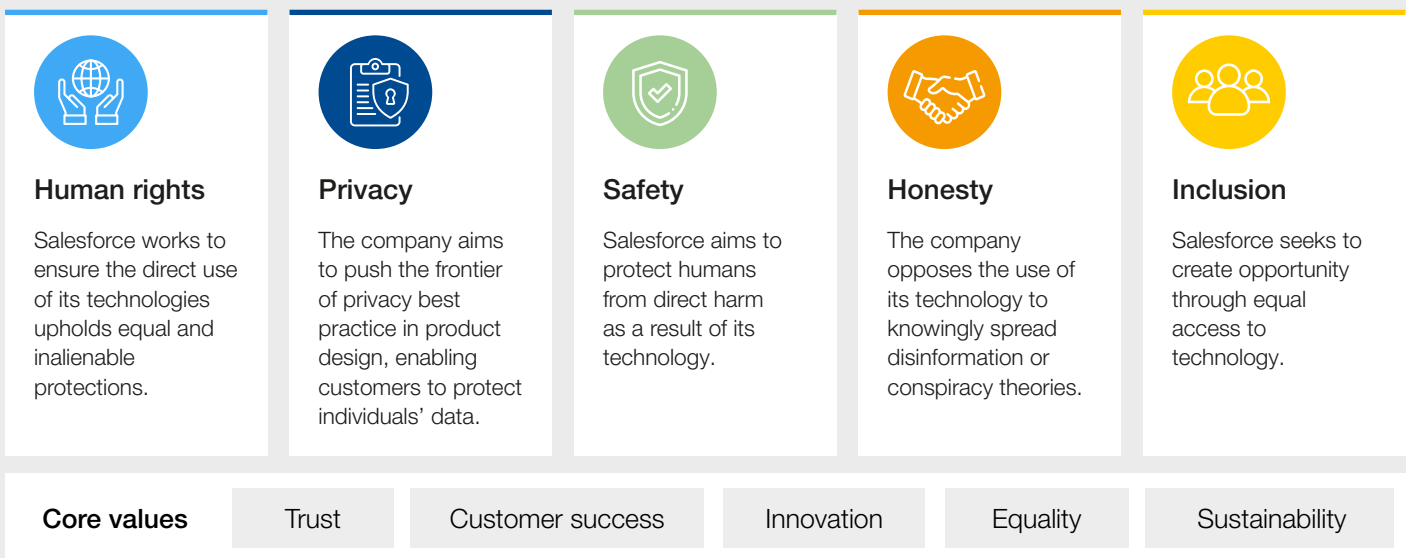
The group, consisting of a few members of the Office of Equality and a team of ethics consultants,<sup>12</sup> referenced several internationally agreed-upon civil, social and political covenants (the International Covenant on Civil and Political Rights, UN Guiding Principles for Business and Human Rights, and

International Covenant on Economic, Social and Cultural Rights to name a few) to create a shortlist of principles to guide their work.

This pilot project started small but with executive backing and investment to build a committed culture and provide a clear mandate for future work in the ethics space.

From there, they invited their employees to stack-rank the values via a broader all-company survey on ethical use, sent to all 30,000 employees at the time. Based on the results, five prioritized ethical use guiding principles emerged.

FIGURE 3 Ethical use guiding principles



Source: World Economic Forum



“ The council’s role is advisory, guiding the Ethical Use team’s recommendations that ultimately go up to Salesforce’s co-CEOs for final decisions.

## 2. Understanding external consumer perspectives

After understanding employee sentiments and priorities on ethics, leaders turned externally to grasp the importance of ethics and human rights and the value they bring to customers and consumers more broadly.

The results of a third-party survey of 2,400 consumers in the United States were overwhelming: people cared about ethics.

- 93% of consumers said companies are responsible for looking beyond profit to impact society positively.
- 72% of respondents wanted their companies to advocate for human rights.
- 69% of consumers wanted the companies they buy from to advocate for human rights.

Salesforce published these findings in the *Ethical Leadership and Business Report*<sup>13</sup> and applied these data to guide its work and offer insights for others who share its commitment to these vital issues.

With the clear business case and energy surrounding the initiative from employees, it was time to create the foundation and framework for the work ahead.

## 3. Establishing an Ethical Use Advisory Council

The first issues the Office of Ethical Use faced were policy concerns – questions around what customers could or couldn’t do with Salesforce technology. It was clear that no one person – or company – could ever have all the answers to complex and nuanced questions such as these. They came to a consensus that the best way to create policy recommendations for leadership to consider would be to start by listening and including as many diverse viewpoints in the process as possible.

One way they addressed this was by creating an advisory council comprised of internal front-line employees, executives and external experts to gather regularly and guide decision-making. For the council, internal members are selected to ensure diverse representation across a broad

range of functions within the company globally. External members are invited to join the Advisory Council based on their areas of expertise. They come from various backgrounds, ranging from human rights advocates to AI ethics researchers to leaders from academia and non-governmental organizations working on questions of tech ethics. External advisors and front-line employees (below Vice President-level) are compensated for their participation on the council out of respect for their time and expertise. It has been made clear that this compensation should not impact their ability to hold the company accountable where appropriate.

The Office of Ethical and Humane Use triages employee concerns and questions, conducts research and bubbles up the most urgent topics to the Advisory Council. Ethical Use team leaders meet regularly with this group to share critical issues they are grappling with and receive feedback. The full council assembles on a quarterly basis, but subsets of it connect more frequently to discuss niche or urgent issues. As part of those meetings, council members expand the conversation, identify opportunities to improve and guide investigations into potential solutions. The council’s role is advisory, guiding the Ethical Use team’s recommendations that ultimately go up to Salesforce’s co-CEOs for final decisions.

The council members provide input that can effectively negotiate the interplay between business, community and marginalized populations, as well as opportunities to devise solutions in partnership with the stakeholders Salesforce intends to support. Their guidance ensures that the company considers a broad set of perspectives, which helps mitigate risk and avoid harmful unintended consequences.

Council members don’t always agree, but that makes the model invaluable for Salesforce. It offers the Ethical Use team a trusted avenue to make thoughtful, informed, measured and inclusive recommendations after considering a variety of perspectives. This framework has enabled Salesforce to create effective policy safeguards,<sup>14</sup> such as prohibiting the online sales of assault weapons and accessories to individuals using the Salesforce platform.

### BOX 2

#### Internal and external Ethics Advisory Councils

As interest in the ethics of technology has grown, companies have developed their own councils and advisory groups for considering ethical issues for a range of reasons, including visibility, accountability

and the fact that it’s hard to make complex ethical decisions alone. This trend is visible across all three companies examined in this series: Microsoft, IBM and Salesforce.

#### 4. Hiring a Chief Ethical and Humane Use Officer

By the end of 2018, Salesforce had hired Paula Goldman as its first-ever Chief Ethical and Humane Use Officer. Goldman hailed from the philanthropic investment firm Omidyar Network, where she led the Tech and Society Solutions Lab. As one of the initial external advisors on Salesforce’s ethical use advisory council, she was familiar with the company’s work in this space.

Goldman was focused on the impact that Salesforce could have on the culture and direction of the tech industry. Her first task was to build a team and define its remit. Alongside others, she created a go-forward strategy for addressing ethics.

With a highly visible Chief Officer in place to lead the charge, the team began working earnestly to embed ethics across the company’s products and product use policies.



**We’ve seen technology play a hand in amplifying violence and exacerbating societal inequities. It’s also facilitated democratic engagement, provided spaces for marginalized communities and enabled a global vaccine rollout. As builders, it’s our responsibility to understand the past and think about the future impact of what we build today.**

Paula Goldman, Chief Ethical and Humane Use Officer, Salesforce

#### 5. Centralizing efforts across the company with intentional organizational design

To scale the ethical use of technology, Goldman knew her team needed to partner across the company to anticipate potential risks and embed ethical safeguards into the products themselves. To centralize work and scale impact, she first had to identify who was working on ethics at Salesforce.

One of those people was Kathy Baxter. Since 2016, she’d been working to build an ethical AI practice. She saw the need for greater awareness and education around the ethical risks of AI technology – and she wasn’t alone.

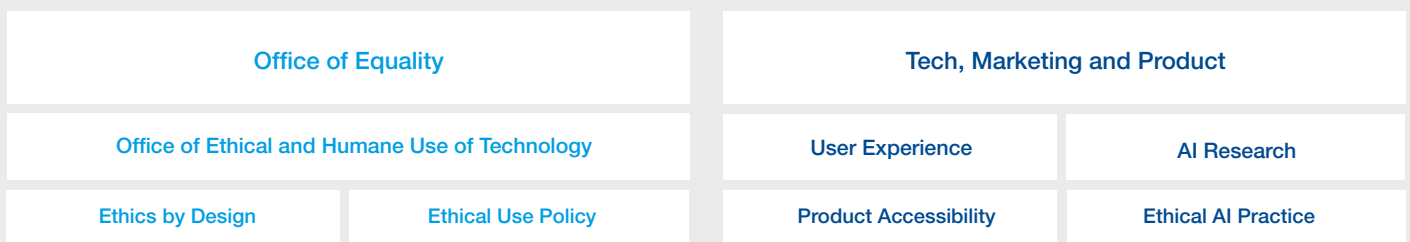
Looking back, Baxter recalls that the teams where she’d initially worked quickly became “ambassadors”,

evangelizing the value of ethics organically, wherever and however it came up in their work. To Kathy, it was the result of a company culture that was passionate about equality and inclusion. Across subsequent presentations and consulting, she remembers the ease with which she found “like-minded souls” who helped her build awareness about things like privacy, bias and risk. Starting with Baxter’s AI research team, this effort grew into Salesforce’s formal practice.

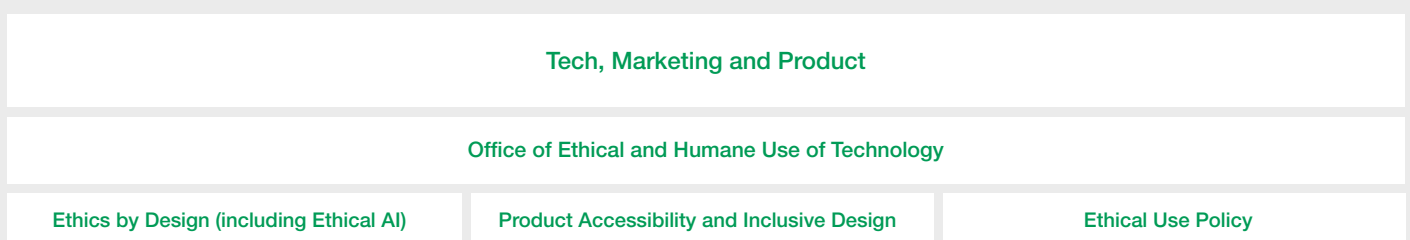
A number of groups and projects benefited from Baxter’s subsequent presentations and consultation, further advancing the use of ethical AI practices. Baxter emphasizes the ease with which she found “like-minded souls” across the company, who were equally passionate about equality, inclusion and diversity.

FIGURE 4 Salesforce ethical and inclusion product team

2018 ethics and inclusion exist in separate parts of the business



2021 bringing it all together under one organization



Slowly, the work picked up support from employees and executives, and under Baxter's leadership, an ethical AI practice was formed within the AI Research team.

Then came the Office of Ethical and Humane Use in 2018, whose focus was broader than just AI ethics. Its charter encompassed all of Salesforce's technologies, with the goal of embedding ethics into company policies, products, and features and ensuring accessibility and inclusive design in the product development process.

To make the most significant impact on product policy, ethics and accessibility, Salesforce brought

together its Ethical AI, Ethics by Design, Ethical Use Policy and Product Accessibility teams under Goldman within its wider Product Strategy and Operations organization to form the Ethical and Inclusive Products team.<sup>16</sup>

These teams already shared common goals: mitigating risk to marginalized communities and protecting businesses' ability to serve a diverse customer base. They even worked together on issues like data privacy and consumer trust before coming together officially. As one organization, however, they could pool resources and more proactively consider a spectrum of interrelated concerns.

### BOX 3 Organization-wide commitment

Another trend noted across case studies was the necessary combination of both top-level executive support and grassroots organization. In many cases,

grassroots efforts surfaced risks and opportunities to improve, while executives were essential in securing the resources and leadership to address them.



## 1.3 Cross-functional partnerships

An entire team dedicated to ethics and accessibility must collaborate to achieve the best results. The Ethical and Inclusive Products team works closely with teams focusing on Security, Trust and Safety, Government Affairs, Legal, Product, Equality, Accessibility, Engineering, Research and Insights, Sales and Enablement, Communications, PR, Philanthropy and the Salesforce Foundation. By staying in constant, coordinated communication with teams like these across the company, a central hub can scale

strategic initiatives and investments of time, talent and resources from other teams.

This closer partnership with the people working directly on how Salesforce products function and evolve means that the company can address emerging issues in real-time and collaboratively work towards the company's overall goals as defined by a corporate strategy and accountability mechanism – the vision, values, methods, obstacles and measures (V2MOM).

2

# Making an impact at Salesforce across policy and product

Integrated, company-wide collaboration on ethics facilitates alignment, accountability, prioritization and resource management.

## 2.1 Driving accountability through the V2MOM

Salesforce's commitment to intentionality required some way of clearly laying out goals – and defining what it meant to meet them. At its inception, the company settled on a model that combined planning and evaluation in a form that aimed to both cascade top-level values and strategies and inspire bottom-up buy-in and ideation: the V2MOM.<sup>17</sup>

At its core, this strategic tool helps Salesforce drive company-wide alignment, prioritize what's most important and manage how time and resources are spent, and hold individuals and the wider business accountable through tracking progress against the goals they set for themselves. These living documents are visible to everyone in the company, allowing for flexibility and accountability.

V2MOMs exist on the individual level, for teams and the company as a whole. The corporate V2MOM sets out the priorities that inform the V2MOMs of teams and individuals. Everything in the corporate-level V2MOM is stack ranked to signal its importance to employees. For the past several years, ethics and inclusion efforts have been included in the top-level company V2MOM within its number one goal.

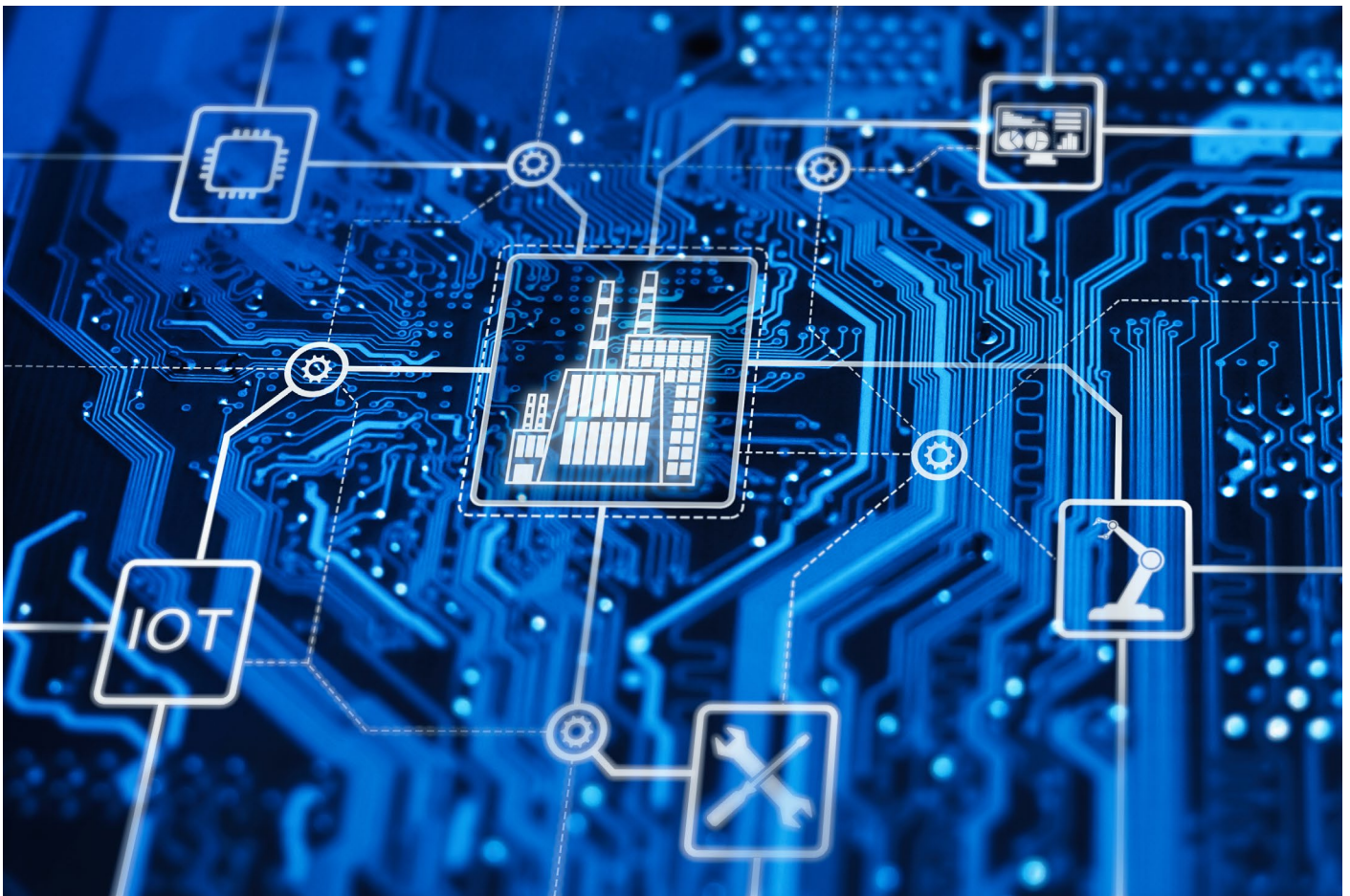
The Ethical and Inclusive Products team uses this visibility to drive impact across the company by influencing leaders, especially within product teams, to include ethics, inclusion and accessibility-related goals in their teams' V2MOMs. The Ethical Use

team partner with leaders and frontline employees across the company to suggest, co-create and tailor V2MOM goals specific to various functional areas to drive greater adoption and accountability. Some examples include:

- Submit [product/feature] for an Ethics by Design product review to keep ethical use top of mind in the product/feature development process.
- Ensure the [insert AI model name] has a model card published when it goes to general availability (GA).
- Reach out to the Ethical AI team to assess the performance of the [insert AI model name] by sub-groups such as gender, age, or location to determine if the model is robust to all user types. Commit to mitigating risks if any are identified in the assessment.
- Complete 100% of the Ethical and Inclusive Products Trailmix<sup>18</sup> on Trailhead.

To keep progress transparent, every quarter, the Office of Ethical and Humane Use hosts Ethical Use Advisory Council meetings, participates in reviews with Salesforce's executive leadership team to go over progress on the company's ethical use and accessibility commitments, and meets with the Privacy and Ethical Use Committee of Salesforce's Board of Directors.





## 2.2 Driving impact: Identifying and prioritizing key focus areas

Making change happen in practice requires that companies prioritize effectively. The Ethical and Inclusive Products team does this by concentrating on creating ethical use policies for how Salesforce products are used and guiding the ethical design and development of these products.

Some of these focus areas are naturally risk-prone, such as AI technologies in which accuracy depends on representative data and bias mitigation, and can have significant impacts in key areas of life, such as loan processing and even criminal sentencing. Others shift with social changes and geopolitical events, requiring quick reactions and a willingness to stay flexible while continually assessing available resources – time and people power – and how the business can best target their efforts strategically.

This diverse team works on many issues at once – including ethical AI, trusted marketing and ethical data use, human-centric service work, inclusive technical language, product accessibility, inclusive design, and policy creation and implementation. The key is continuously prioritizing by risk and urgency to ensure the highest impact work gets done with regard to the design, development and direct use of Salesforce technologies. This ensures

that the business can direct resources to the places they have the most positive impact.<sup>19</sup> To do so, they consider questions such as:

- How much harm could occur?
- How soon will it happen?
- Whom could it happen to?
- What can be done about it?

The team answers these questions by focusing on answers directly tied to the Salesforce product, not just in the abstract. While triage situations prioritize limiting harm for high-risk technology, the group maintains a holistic approach by understanding the potential advantages and even unintended positive consequences of deploying a particular feature or product. By digging deep into how products live in the real world, these broader questions inform what action the company takes – and when that action is taken. They also inform an accountability-focused partnership with the product designers, managers and marketers with the most perspective on the specific areas of the business they touch.

“ The key is continuously prioritizing by risk and urgency to ensure the highest impact work gets done with regard to the design, development and direct use of Salesforce technologies.

3

# What does embedding ethics into technology actually look like?

Bringing about lasting change that reflects a commitment to the ethical use of technology involves a lot of time, effort and resources.

Understanding an existing product's ethical implications and risks is one thing, but what does it mean to embed an ethical perspective into the design and iteration process itself? Salesforce believes that avoiding mistakes is more efficient and less harmful

than correcting them. One way to combat this is to create rigorous, repeatable decision-making processes and include diverse voices to guide ethical use policy and product recommendations.

## 3.1 Including diverse perspectives in the product development process

To develop and implement strategic frameworks to guide the design, development, and use of Salesforce technologies, the team starts with active listening and includes a wide range of perspectives. This includes communicating with and learning from all relevant stakeholders such as employees, partners, customers, members of impacted communities and experts in the field.<sup>20</sup>

One example of this is Salesforce's inclusive technical language initiative, which works to remediate harmful language in the technology's content and code.<sup>21</sup> To dig a little deeper into how this process of inclusion works in practice, it helps to understand the steps the company took.

1. **Engage impacted communities.** The team worked with the company's employee resource groups (ERGs),<sup>22</sup> particularly BOLDforce and Latinoforce, and Salesforce's Black and Latinx ERGs, to identify harmful technical terminology and appropriate replacements. Additional consultations were conducted with external experts in the diversity and inclusion field.
2. **Create guidance.** In partnership with this cross-functional and diverse group of stakeholders, an internal playbook was formed with guidance on identifying and replacing harmful language in technical content and code.

3. **Iterate and dive deeper into nuances.** Some of these replacements, like swapping "blackout" with "reduced availability", can be fairly simple – a one-to-one find-and-replace. Others are more nuanced, like the term "master", which has many varied uses in the tech space. In partnership with the ERG representatives, specialists identified the many ways the term is used and created suggestions for the different use cases based on the level of harm and context of use.
4. **Operationalize.** These suggestions formed the basis for remediating thousands of instances of outdated language and prompted teams to employ technology to scale the effort.
5. **Ongoing learning and scaling.** The learnings were applied across the company in partnership with localization teams to ensure the inclusive language initiative was global. Likewise, learnings from this process were reviewed to replicate and improve the effort for future terms.

BOX 4 | Inclusive language in technology

As noted in prior case studies, language adjustments have been a trend across several of the tech industry's leading businesses. Page 18 of the IBM report<sup>23</sup> details the company's efforts, and

Microsoft has taken similar steps to keep its lexicon up to date. These kinds of projects may offer an effective and practical early goal, with measurable results and a direct impact on business assets.

The impact of the inclusive process and intentional inclusion of voices not usually heard in the product process had significant impacts.

The inclusive language playbook and guidance were shared with technical content and code teams through engagement workshops, internal Slack posts and training in the onboarding boot camp for all TMP new hires. The learnings were also shared externally to benefit other companies looking to make similar inclusive language shifts.

In addition to employee enablement to prevent the continued use of harmful language, the team partnered with the security team to enhance an internal tool used to scan, prioritize and ultimately assign non-inclusive terms to be replaced by engineers. Software tool Acrolinx also helps scale

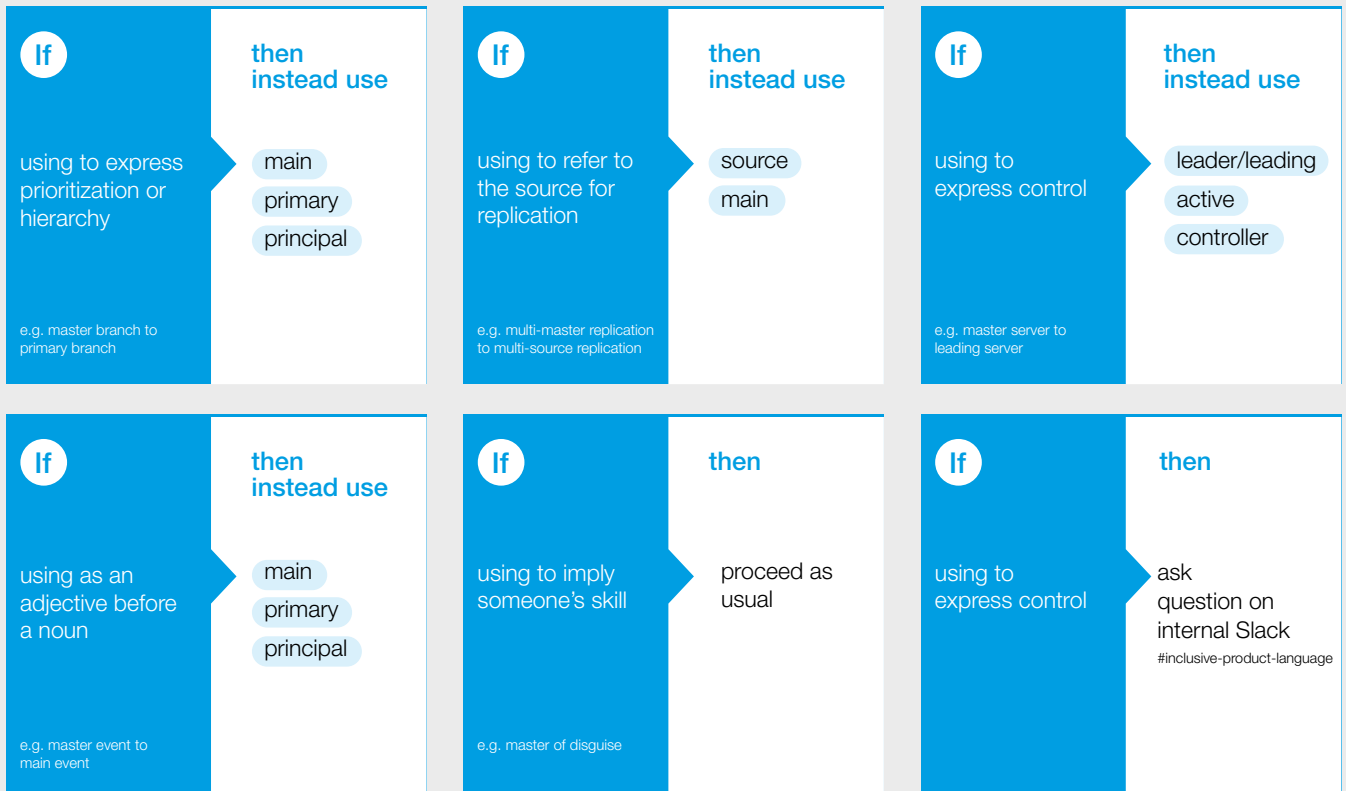
internal awareness. The tool checks technical content against a list of non-exclusive terms, notifies users when a non-inclusive term is used and then suggests an inclusive alternative. Ultimately, the tool allows employees to fix existing content easily and keeps writers from reproducing deprecating, harmful language on an ongoing basis.

Through this initiative, the Ethical Use team formed a repeatable review and remediation process in partnership with Salesforce's Office of Equality. This year, it will continue to build upon the process to focus on additional non-inclusive language in the gender identity dimension. It is hoped that this effort also changes how people choose language in the first place, preempting bias by encouraging thoughtful, forward-looking terminology.

FIGURE 5 Replacing “master” in the naming system

**Problem:** The word “master”, a historically insensitive term associated with slavery, is widely used in tech jargon.

**Solution:** Use this decision tree to replace the term “master” with an alternative term when possible.



An example of language remediation guidelines for the word “master”. The guide offers several alternatives such as “primary”, “principal” and “active” based on the context and intended meaning of the outdated word.

Source: World Economic Forum

## 3.2 Product governance: Product use policy

Policy creation follows a similarly inclusive, rigorous and repeatable process to consider all sides of an identified ethical concern, anticipate unintended impacts of any decision and create a policy recommendation for the company. It is essential to apply thoughtful consideration not on a customer-by-customer basis but at a product policy level and respond appropriately and in a values-led way.

The process begins when an ethical use concern is flagged for the team through their own research or an employee channel. The Office has several ways for employees to reach them to express concerns or ask questions: an email alias, a Slack channel, one-to-one consultations and a confidential portal for logging inquiries shared with the legal team called Ethicspoint.

After receiving a concern, the Ethical Use Policy team triages to determine the urgency and priority of the issue, whether the case warrants further investigation, or whether there already exists a policy, process, or another team that can answer the employee's questions. Things like the potential scale and intensity of harm help the team prioritize and direct mitigation efforts in the meantime.

If there is no precedent, the case gets escalated. Salesforce's policy team and internal partners then use their investigative framework, established through experience and industry research, to dig deeper and create a policy recommendation for approval by company leadership.

The framework includes the questions listed in Figure 5.

FIGURE 6 Informed by our ethical use framework

### Guided by our Ethical Use Advisory Council

| Direct vs indirect  | Values and principles   | Effectiveness of proposed action   | Global legal and political landscape                                    | Industry benchmarking   |
|---|---|--|---|---|
| How <b>directly linked</b> is the use of Salesforce technologies to any harm? | How <b>strong</b> is the conflict with Salesforce values and/or guiding principles? | How much <b>impact</b> will actions have resolving or mitigating any harm? | What are the <b>legal and political</b> issues to be aware of globally? | What are other <b>leading tech companies</b> doing on this issue? |

Source: World Economic Forum

Rigorous research goes into answering these questions, including a process to incorporate the viewpoints of many stakeholders impacted by any policy decisions, including external experts and representatives. The research and stakeholder engagement process is varied, and activities are uniquely catered to the use case at hand.

Focus groups give dedicated time to discussion and feedback on specific issues such as data privacy. Listening sessions allow stakeholders to share their concerns openly and without interference. In-depth interviews apply qualitative research practices to explore industry trends, challenges and perceptions. Salesforce also meets with advocacy groups, external subject matter experts and third-party firms to expand its leadership's understanding of the ethics landscape and the company's place in it.

Once the research is conducted, the team presents a recommendation to a subcommittee of the Ethical Use Advisory Council. The subcommittee provides feedback on the recommendation and requests additional information. It typically takes several convenings of the subcommittee and iterations of research to get to a consensus from the group on a recommendation to present to the company executive leadership for approval.

If approved, the Ethical Use team then partners with teams across the company – Sales, Customer Success, Legal, Government Affairs and Partner Managers, to name a few – to implement the policy change in Salesforce's acceptable use policy (AUP)<sup>24</sup> and proactively communicate the information to customers who may be impacted in the future. The team also partners with customers whenever possible to help them understand the product use policies and mitigate concerns to get them back in compliance.



### 3.3 Embedding ethics into product design and development

TABLE 1 Principles guiding ethical product design and development at Salesforce

| Ethics by Design focus areas                                  | Product-specific guiding principles  |  |
|---|--|--|
| <a href="#">Ethical AI</a>                                    | <ul style="list-style-type: none"> <li>– Responsibility</li> <li>– Accountability</li> <li>– Transparency</li> </ul>   | <ul style="list-style-type: none"> <li>– Empowerment</li> <li>– Inclusivity</li> </ul>             |
| <a href="#">Ethical vaccine management</a>                    | <ul style="list-style-type: none"> <li>– Human rights and equity</li> <li>– Privacy and autonomy</li> </ul>  | <ul style="list-style-type: none"> <li>– Trust and transparency</li> </ul>                         |
| <a href="#">Trusted marketing and ethical personalization</a> | <ul style="list-style-type: none"> <li>– Use and collect individual information appropriately</li> <li>– Be transparent about data use</li> <li>– Remember consumers want control and clarity</li> </ul> | <ul style="list-style-type: none"> <li>– Provide clear benefits in exchange for data</li> </ul>    |
| <a href="#">Human-centric customer service</a>                | <ul style="list-style-type: none"> <li>– Centre agent experiences</li> <li>– Build trust with transparency</li> <li>– Evolve key performance indicators (KPIs) to fit the moment</li> </ul>              | <ul style="list-style-type: none"> <li>– Train intentionally</li> </ul>                            |
| <a href="#">Inclusive product language</a>                    | <ul style="list-style-type: none"> <li>– Assess for:</li> <li>– Representation</li> <li>– Historical context</li> </ul>  | <ul style="list-style-type: none"> <li>– Cultural appropriation</li> <li>– Stereotyping</li> </ul> |

Source: World Economic Forum

“ Ethics by Design plays the role of uniting diverse perspectives to consider the unintended consequences (both positive and negative) of the company’s technology.

In addition to company product use policy, Ethics by Design, plays the role of uniting diverse perspectives to consider the unintended consequences (both positive and negative) of the company’s technology, creatively problem-solve to mitigate those risks and minimize product misuse that could compromise the safety and success of its customers and all stakeholders. This team works with tech and product to embed ethics safeguards into the technology.

By co-creating guiding principles that correspond to specific product areas for Salesforce teams, leaders embed accountability and direction into the products they work on every day. These principles can be more precise in their focus and can be better at guiding actions in particular use-cases.

One example is the work done to increase trust in Salesforce’s AI and marketing products by focusing on ethical personalization and responsible data use.

The Ethics by Design team partnered with Salesforce’s Research and Insights leads on a user summit that brought together marketers and consumers to learn how to create marketing strategies that are trusted and ethical. These strategies focus on connecting consumers with targeted content they want without using their data in ways they can’t understand.

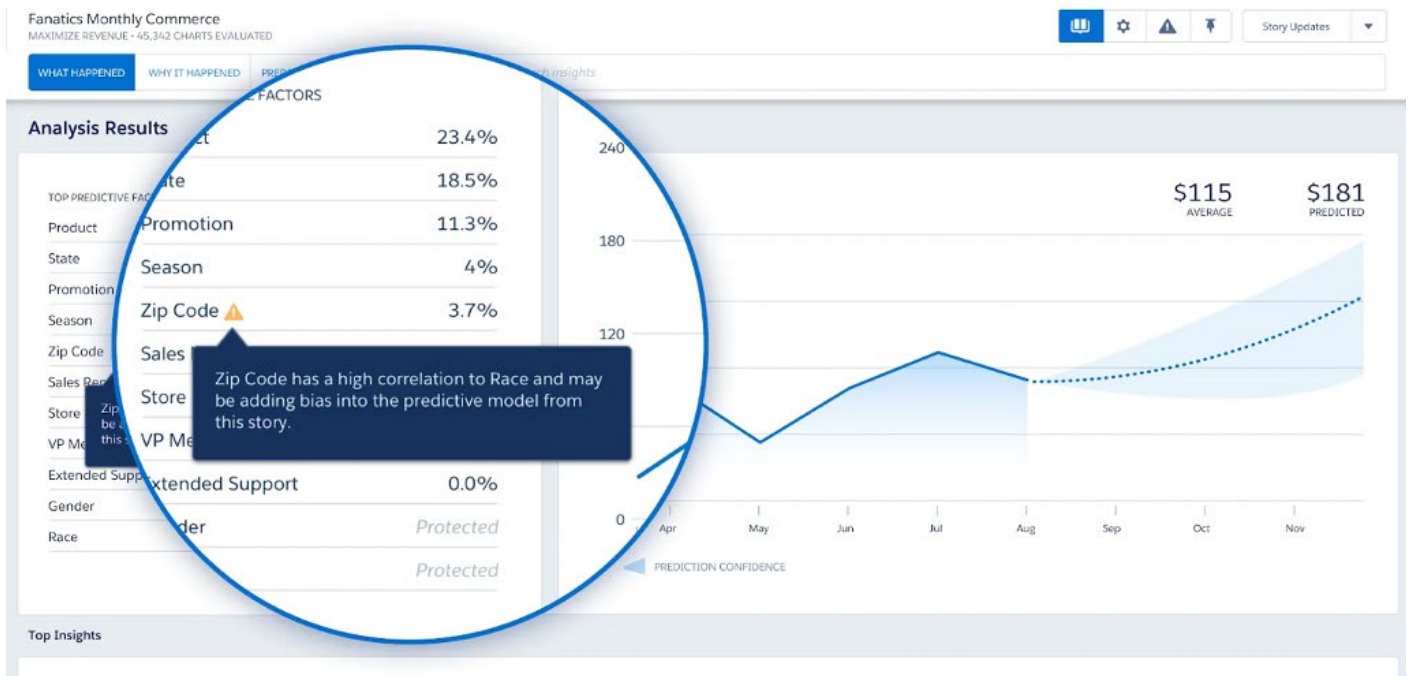
During the summit, the group joined empathy-building exercises, including an interactive activity highlighting the similarities and differences between marketers and consumers in their perception of marketing effectiveness. This led to an in-depth

discussion among the group about how marketers can be more effective by building trust with their consumers, preserving privacy controls and using consumer data more responsibly.

As a result, the team developed four trusted marketing principles,<sup>25</sup> which put consumer needs and wants at the centre of how marketers think about success. These principles are implemented within the products themselves to safeguard consumer privacy, harmful bias and other ethical concerns. One example of an ethical differentiator feature is the marketing cloud Einstein Content Selection flag,<sup>26</sup> which highlights where certain attributes, values or categories could contribute to bias. Example fields include age, race, gender or ZIP code data.

As with other projects, Salesforce shared its approach and learnings with customers and the tech industry through avenues like Dreamforce, AdWeek, and eMarketers webinars, blog posts and customer calls.

Following the webinars, subject matter experts created guides for marketers on the ethical use of data for Customer Data Platform,<sup>27</sup> Interaction Studio<sup>28</sup> and Einstein<sup>29</sup> products that address the risks of using collected information and how to mitigate them. Model cards, akin to “nutrition labels” for global AI models, are another contribution from this business area. They convey how the models work, including inputs, outputs, optimal conditions and ethical considerations in their use. By educating the customer, model cards also have the beneficial side effect of helping customers better understand their AI model, enhancing trust.



Source: "Recognize Bias in Artificial Intelligence", Salesforce Trailhead

### 3.4 Enablement and education: Ethics is everyone's responsibility

☞ **Salesforce maintains a dedicated Slack channel where its more than 1,300 members can ask questions, reach out to Ethical and Inclusive Products team leaders, and discuss up-to-the-minute concerns.**

Ethics and inclusion efforts cannot be made alone. While progress has been made in company-wide customer policy creation, embedding ethical safeguards into the product and ensuring products are accessible to and inclusive of all, more work is still needed. In a landscape of geopolitical flux, increasing regulations, unprecedented current events and emerging technologies changing everyday realities, there is never a shortage of topics to focus on. Salesforce's products are used by customers from every industry around the world, all of which are impacted by that ever-changing landscape. The challenge of implementing meaningful change involves a great deal of time, thought and resources.

To scale its efforts, Salesforce empowers its employees, partners and community to consider technology's potential benefits and harms so that it can build tools and features that help to navigate uncertainty, increase trust and positively impact the world.

As explored earlier, grassroots efforts from engaged employees were crucial to creating the Office of Ethical and Humane Use. Salesforce aims to ensure that all its employees remain equipped to have important conversations about the impacts of technology and concerns they may experience or anticipate.

To that end, the Ethical and Inclusive Products team facilitates a range of global engagement opportunities, including internal workshops, employee listening sessions, regular newsletters, a resources microsite and open discussion forums on Slack and through internal events.

One example of how Salesforce builds its culture includes a boot camp required for all new hires in any tech, marketing and product role. It plays a dual role in introducing the company's approach to ethical issues and helping new hires understand where their role fits in the overall process of delivering thoughtfully-considered products. Over the last two years, the ethics session in the boot camp has reached 4,900 employees.

Another example is the Ethical and Inclusive Products team's newsletter. With more than 14,000 internal recipients, it provides up-to-date perspectives on top-of-mind issues; content covering thought leadership and recent innovations, and information on how to get involved with ongoing or upcoming initiatives.

Salesforce also maintains a dedicated Slack channel (a topic-driven company chat space) where its more than 1,300 members can ask questions, reach out to Ethical and Inclusive Products team leaders, and discuss up-to-the-minute concerns transparently.

## 3.5 Making Ethical and Humane Use accessible to all

In addition to actively listening to and engaging with employees, there is a range of internal and external opportunities to ensure that anyone interested can learn about the process and promise of the work. According to advocates at Salesforce, the necessary tools and resources to infuse ethics into tech shouldn't be a secret.

Salesforce standardizes and democratizes learning by publishing educational modules on Trailhead, Salesforce's free, online learning platform. These modules are also available to the public.

The Intentional Innovation Trailmix<sup>30</sup> includes several ethics and accessibility-related learning modules on Trailhead. Examples modules include:

- **Ethics by Design:** For technology to be a positive force, it must be designed, developed and used in an ethical and humane way. From the start, its intent must be to maximize positive impact and minimize any potential negative effects. This idea is at the heart of product ethics, or what Salesforce calls Ethics by Design. In this module, users explore this concept, how Salesforce practices ethics by design and ways they can incorporate these values into their business.
- **Responsible Creation of Artificial Intelligence:** AI can augment human intelligence, amplify human capabilities and provide actionable insights that drive better outcomes for a business's employees, customers, partners and communities. Salesforce believes that the benefits of AI should be accessible to everyone,

not just the creators. It is not enough to deliver just the technological capability of AI. Creators are also responsible for ensuring that customers can use their AI in a safe and inclusive manner.

- **Inclusive Design:** Everyone knows what it feels like to be left out. From products that some people can't use to processes that are not open to everyone, a lack of inclusion can leave a life-long impact – even something as simple as the memory of a childhood sporting event where one person could not play because the activity was not designed with them in mind. This module explores ways designers can build with diverse needs in mind, so these experiences are not always so universal.

Another training method initially used internally, but is now available to the public, is the Build with Intention workshop. This workshop is how the Ethical and Inclusive Products team gathers a diverse set of cross-functional team members across product, engineering, research, design and more to collaboratively think through unintended impacts of the products they are building and create an action plan to address any identified risks before launch.

In 2021, Salesforce launched its external *Build with Intention Toolkit*<sup>31</sup> with a step-by-step guide for readers to host their own workshops to consider unintended consequences and specific considerations for ethics and accessibility that the company tested with internal teams. This methodology built upon the Consequence Scanning framework created by UK-based think tank Doteveryone.<sup>32</sup>

FIGURE 7 Build with intention considerations

| Protect data  | Consider all populations  | Mitigate bias and uphold human dignity   | Increase access and inclusion  | Prevent harms and misuse  |
|---|---|--|--|---|
| <ul style="list-style-type: none"> <li>– Have you considered data privacy concerns?</li> <li>– Have you considered issues of data rights?</li> <li>– How secure are your data?</li> </ul> | <ul style="list-style-type: none"> <li>– Are diverse perspectives included in the product design and development process?</li> <li>– Who is impacted by your product?</li> <li>– Have you considered any adverse impacts of your product on marginalized groups?</li> </ul> | <ul style="list-style-type: none"> <li>– Does your product amplify or reinforce harmful bias?</li> <li>– Is your AI created and used responsibly?</li> <li>– Have you considered the impacts of automation?</li> </ul> | <ul style="list-style-type: none"> <li>– Is your product accessible?</li> <li>– Are you practicing inclusive design?</li> <li>– Have you considered the impacts to users with disabilities?</li> <li>– Are you creating fair and usable product experiences for everyone?</li> </ul> | <ul style="list-style-type: none"> <li>– Have you considered product abuse prevention and protection against harmful content?</li> <li>– How can you safeguard against use by bad actors?</li> <li>– How can you promote safety and the appropriate use of your product?</li> </ul> |

Source: Salesforce



The kit shares an entry point to start thinking proactively about how to approach innovation through a lens of ethics, inclusion and accessibility. It is also a framework for collaboration with guidance for leading workshops that will prompt discussion and deep thinking across teams and diverse perspectives.

This free digital package contains everything users need to lead workshops and proactively anticipate the intended and unintended impacts of technology. It also offers insight into making effective plans for mitigating those risks. Some components include discussion questions, sample exercises and templates, and an interactive Google Jamboard to

facilitate virtual collaboration. These tools can be woven into the day-to-day work of tech creators to guide ethical awareness and thoughtful inclusion of diverse perspectives throughout the product design and development process.

Salesforce also recognizes the importance of keeping its resources up to date by including avenues like the public email alias in the toolkit to receive feedback, listen to and learn from users, and iterate. The goal is to create something that others in the industry can use to drive progress. In turn, Salesforce hopes to learn how other businesses navigate things like privacy, human rights, accessibility and emerging technology.



### 3.6 Growing multistakeholder engagement and collaboration across the industry

Finally, representatives from the office use company and industry events to reach audiences interested in ethics and inclusion topics in tech. Salesforce commits time and resources to external visibility and spurring discussion through events and webinars such as Dreamforce,<sup>33</sup> Salesforce's annual conference that brings together the global Salesforce community (over 170,000 attendees), and industry events like Axios,<sup>34</sup> Commonwealth Club,<sup>35</sup> AdWeek,<sup>36</sup> etc. Their short video, *Everyone*, viewed over 1.1 million times on YouTube, also highlights the values that guide the company as part of its Paralympics partnership.

Recognizing the importance of working together across the industry to solve ethical tech issues, Salesforce participates in multistakeholder convening groups, including those of the World Economic Forum. The Ethical Use team hosted

a responsible tech meeting with the Forum in November 2018 and joined as steering committee members of the Responsible Use of Technology initiative,<sup>37</sup> which brings together stakeholders from industry, non-profit organizations, governments and academia to address today's most pressing ethical and responsible innovation challenges.

The Office of Ethical Use regularly presents its learnings from its various development opportunities to the Forum project community and provides feedback for other member companies with the goal of collective problem-solving. To underscore Salesforce's commitment to this venture, they also funded two secondees – full-time employees loaned to the Forum for a set term – to lead the initiative.

“ Salesforce commits time and resources to external visibility and spurring discussion through events and webinars such as Dreamforce.



Salesforce also shares what it learns through employee membership in government advisory groups. Paula Goldman was appointed in 2022 to the National AI Advisory Committee,<sup>38</sup> while Rachel Gillum, Head of Ethical Use Policy, serves as a commissioner on the U.S. Chamber of Commerce AI Commission on Competitiveness, Inclusion and Innovation,<sup>39</sup> and Kathy Baxter, Principal Architect of Ethical AI, advises the Singaporean government on their Advisory Council on the ethical use of AI and data.<sup>40</sup> These relationships help leaders at Salesforce apply what they and their teams do every day to guide informed reports and policy recommendations.

On proposals like the drafted European Union AI Act,<sup>41</sup> the National Institute for Standards and Technology (NIST) standard for identifying and managing bias in AI, and various AI ethics and governance frameworks, Salesforce regularly responds to requests for comment. Similarly, Salesforce leaders actively attend industry and academic events and lend their support to projects

like the United Nations Human Rights Office's B-Tech Project. Staying connected to the forces and faces driving the future of technology allows leaders to scale their impact and keep up to date on the latest tech trends.

Additionally, this type of engagement – relationship-focused, interactive and designed to shape culture in Salesforce's wider industry – exemplifies how the company's leaders approach the challenge of definitive action in an often fluctuating landscape. By working with the people and organizations driving how government institutions (and often the public) think about technology ethics, Salesforce's leaders aim to build trust between consumers, businesses and the bodies that regulate them.

For Salesforce, engaging through events for the industry and the public is key to providing transparency, education and feedback. Ultimately, no company can create the future alone, and businesses rely on their partners, stakeholders and critics to foster a conversation that produces credible results.

## 3.7 The path forward

“ Today, Salesforce continues to build out its team, connect with stakeholders and collaborate on broader topics, such as accessibility and inclusive design.

In the end, Salesforce's goal is to create lasting principles and frameworks that reflect its commitment to the ethical and humane use of technology while also systematizing them to ensure that those standards are upheld for years to come. These are complex, human issues that require everyone to think through implications of technology and co-create solutions to minimize harm and mitigate risk.

Given that complexity, it's important to remember that nobody has all the answers – Salesforce included. These journeys are long, complex and often tied to the moments and communities they exist within. Yet, with active listening, cooperation and a commitment to building with and for all people, a positive path forward is possible.

As Salesforce looks to the future, the business's ability to mitigate risks proactively is a key sign

of success. No team can be everywhere or see everything in a large company, so building a culture where teams ask for consultations on difficult subjects, attend workshops and feel empowered to connect with ethical use leaders rather than moving ahead with doubts is essential.

Ultimately, the company wants to build a culture of intentional innovation. For Salesforce, the dream is not a world where hard questions don't come up but one where they're prepared with a longstanding framework, process and resources to address the concerns in a thoughtful and trustworthy way.

Today, Salesforce continues to build out its team, connect with stakeholders and collaborate on broader topics, such as accessibility and inclusive design, which are all crucial to Salesforce's forward-looking strategy.

# Conclusion

The ongoing multi-year process described in this report presents key moments in the transformation of Salesforce from a company that already cared strongly about ethics and positive impact, to one that has more formally developed its internal structures to realize its intentions in practice. This transformation is ongoing and takes effort, which is why it is so important to have both leadership and a corporate culture that encourages thinking about the social impact of technology, directing technology towards its good uses and away from its harmful ones.

Salesforce's story emphasizes key points like a willingness to learn, collaboration and commitment. Its ongoing presence as one of the most recognizable names in its field emphasizes that taking substantive steps to be more ethical and inclusive can be part of how companies win – both in the market and in the public's perception.

By starting with a small, but scalable commitment, Salesforce demonstrates one narrative of how to bring values into a business's fundamental identity. It focuses on the fact that perfection isn't a prerequisite for participating in work to make the world better and meet the demands of a global market.

As the world continues to change, companies that care about ethics and responsible technology will need to change as well. The World Economic Forum and the Markkula Center for Applied Ethics at Santa Clara University are thankful for those partners who are making this journey towards a more ethical future possible and it is hoped that more people and organizations will join in this effort.

To learn more, explore the Ethical and Inclusive Products team online at: <https://www.salesforce.com/intentional-innovation>.

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