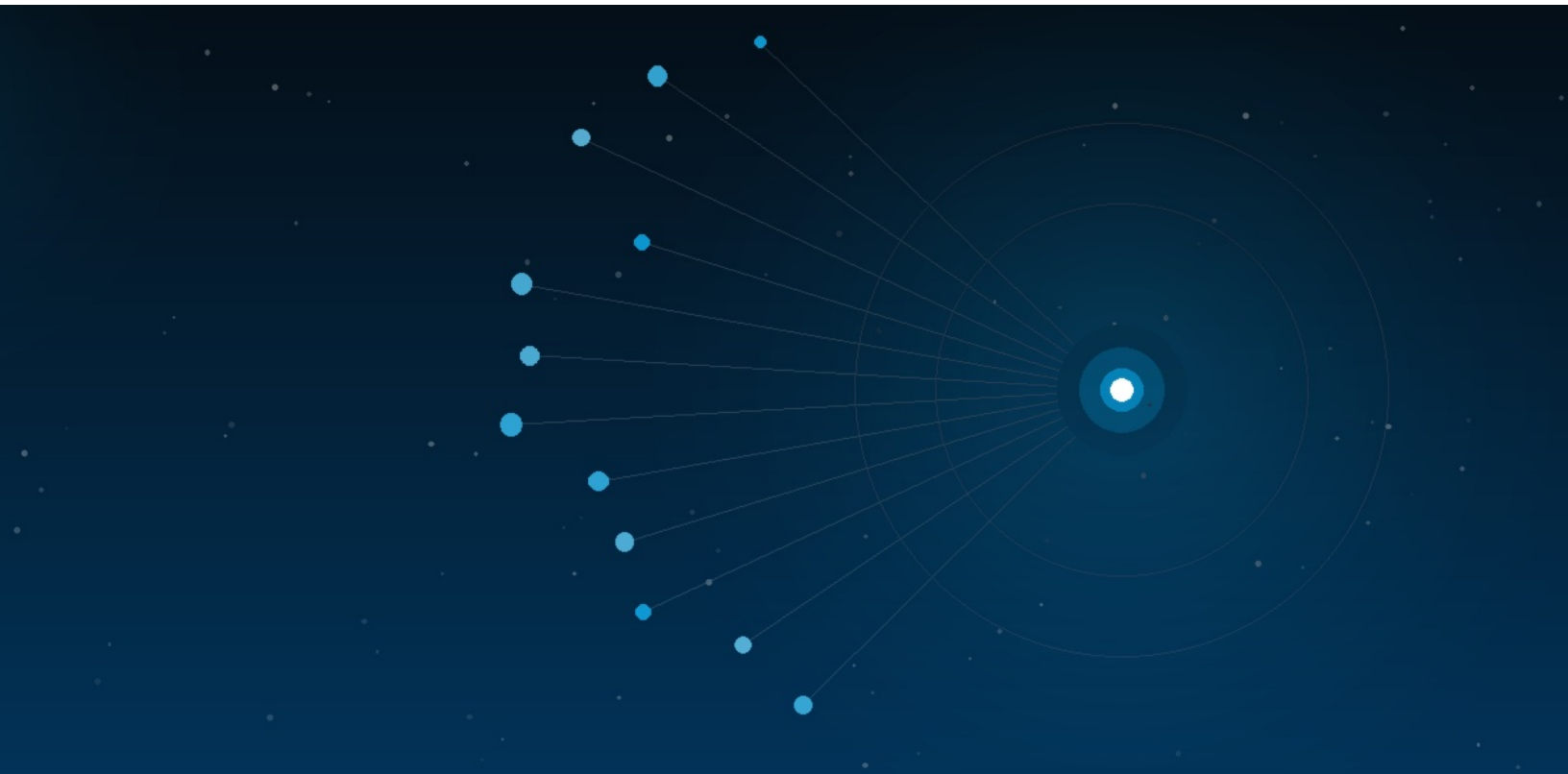




The Platform Payoff: How AI Is Making the Case for a Unified Enterprise Stack

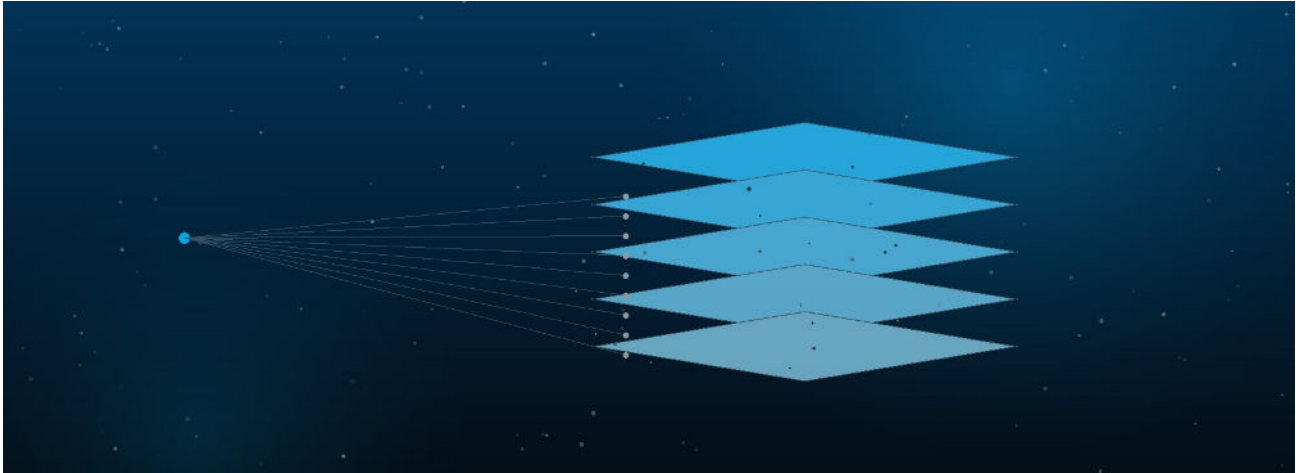
A pragmatic look at why enterprise buyers are consolidating fragmented AI tools into unified platforms, and what that shift means for how software gets priced and bought.

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| 💰 The Hidden Cost of AI Sprawl

Over the past few years, enterprises have accumulated AI capability on a piecemeal basis. Most of that accumulation happened opportunistically. A business unit licensed a copilot to solve one workflow problem. IT stood up a pilot with a hyperscaler's foundation model. A data science team built something custom because the off-the-shelf tools didn't fit. Each decision made sense in isolation, and none of them were wrong on their own terms.



But three years of isolated decisions produce an estate, not a strategy: five or six model providers under contract, overlapping copilots doing the same job in different departments, and no single team that can say which systems touch which data. Those decisions now generate three kinds of ongoing costs that don't show up on the original purchase order.

A large integration tax.



Each tool was evaluated for what it does, not for how it connects to what's already running. Data has to move between systems that were never designed to talk to each other; authentication and permissions get rebuilt tool by tool; and workflows that should span a single pane of interaction instead require an employee to manually shuttle output from one AI system to the next.

A governance and complexity tax.



A model risk framework built for one deployment doesn't scale cleanly to fifteen. Security and legal teams now have to inventory what's in use before they can assess it, and in many organizations, that inventory itself is incomplete because tools were adopted below the radar of procurement. Every additional vendor adds a data-handling agreement, a compliance review, and a new set of questions about where prompts and outputs actually get stored and who can see them.



A vendor-management tax.

Contract renewals, pricing renegotiations, and usage audits used to happen once a year for a handful of core enterprise systems. Now they occur continuously across a dozen AI vendors, several of which are startups whose pricing models, product roadmaps, and even survival are far less predictable than those of the enterprise software vendors these teams are used to managing. Additionally, managing and scaling employee skills across a wide array of applications and tools can introduce administrative challenges and additional recurring costs.

None of this means the original tool purchases were mistakes. It means the bill for speed is coming due, and it's arriving as a recurring operating cost rather than a one-time expense. The organizations now moving to consolidate platforms, rationalize vendor lists, and centralize AI governance are effectively paying down that tax.

The Evolution of Software Pricing

Concurrently, traditional per-seat SaaS pricing is breaking down under the usage patterns of agentic AI. Per-seat pricing was built on an assumption that held for two decades: a human logs in, uses the software during a workday, and the license reflects that one relationship.

Agentic AI breaks that core assumption of how work is done. An agent doesn't log in once and work through a queue of tasks; a person assigns to it one at a time. It runs continuously, calls other tools and APIs on its own, spawns sub-tasks, and generates activity that has no fixed relationship to the number of employees sitting at a keyboard. A single provisioned seat can now trigger thousands of downstream actions in an hour, or sit idle for a week while an unattended workflow handles the volume instead.

That mismatch shows up in three places where procurement teams are already fighting with vendors over:

The Pricing Mismatch Causing Friction with Vendors

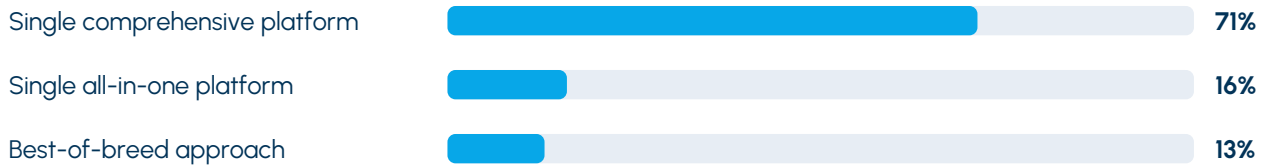
- **Headcount no longer predicts cost.** Seat count was a reasonable proxy for usage when usage meant typing; it's a poor proxy when usage means an agent working around the clock.
- **Consumption is bursty and hard to forecast.** Finance teams accustomed to a predictable annual license fee are now facing usage-based invoices that vary month to month based on what the agents happen to do.
- **One license can span many billable events.** An orchestration layer that calls three or four specialized models to complete a single task turns one user action into multiple metered transactions across multiple vendors, each with its own pricing unit: tokens, API calls, compute minutes, or outcomes delivered.

Vendors are responding by shifting toward consumption-based and outcome-based pricing, sometimes layered on top of a reduced base seat fee rather than replacing it outright. That shift solves the mismatch between price and usage, but it hands enterprises a new problem: none of the cost-control muscle built for per-seat SaaS transfers cleanly to a metered, multi-vendor, agent-driven bill. The same teams already stretched managing governance and vendor sprawl now have to build forecasting and cost-attribution capabilities they've never needed before, for a category of spend that changes shape

every time a workflow gets further automated or enhanced.

The two trends are intertwined, and as a result, platform consolidation is winning favor among buyers. Futurum research, conducted with more than 800 software decision-makers, found that 71% run most applications on a single comprehensive platform and 16% on a single all-in-one platform, leaving only 13% pursuing a best-of-breed approach to purchasing applications (see Figure 1).*

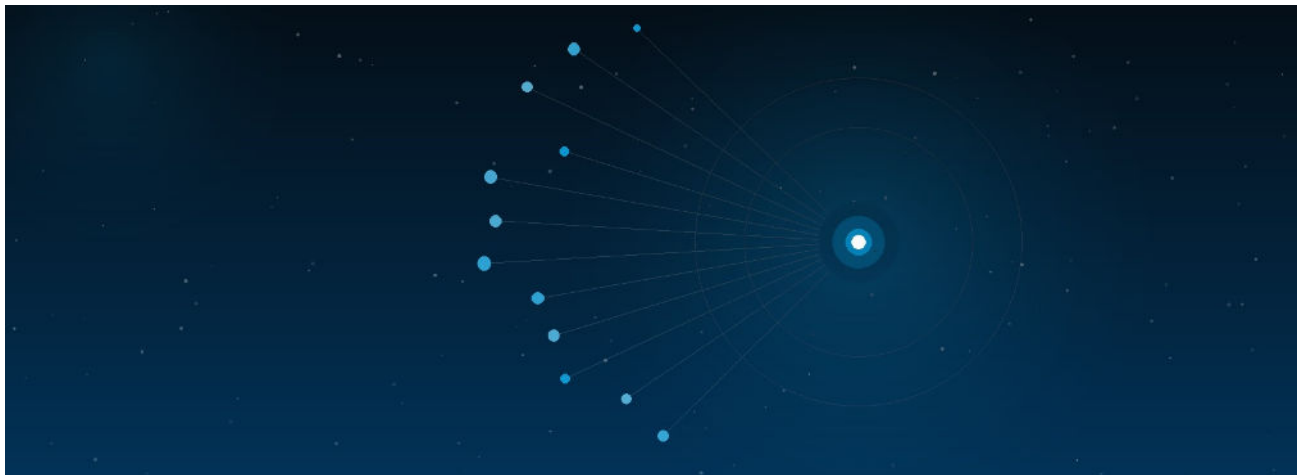
FIGURE 1. SHARE OF BUYERS, BY PURCHASING APPROACH



Source: Futurum Research

A platform-centric approach wins not just because it's simpler, more efficient, and less complex to manage, but also because platforms that bundle or embed AI pricing make it easier for buyers to see value, realize ROI, and confidently budget, compared with stand-alone, metered AI pricing approaches.

Consolidation as a Driver of Efficiency, Simplicity, and Scalability



As noted above, Futurum buyer research indicates that a correction is underway: enterprises are consolidating purchasing with fewer platform vendors rather than adding point tools. In an era of AI-centricity, this scattered approach to building an application stack creates fatigue from managing disparate AI workflows, cross-training staff on incompatible tools, and reconciling fragmented data models.

*Futurum Research. 2H 2026 Enterprise Software Decision Maker Survey.

In Enterprise Technology Research (ETR) assessments, seat- and usage-based AI solutions are measured using direct value-to-cost ratios. In contrast, embedded AI bundled within a core platform is evaluated on distinct criteria: feature utility and customers' willingness to pay if unbundled. This embedded positioning effectively insulates vendors from separate metering demands, as buyers perceive bundled AI capabilities as pre-funded and typically resist supplemental charges.

ETR survey data confirms ongoing budget anxiety: when asked to classify AI token or agentic consumption spend, only 6.5% of respondents called it "entirely an essential business cost," while 27.5% labeled it "primarily discretionary IT budget" and 12.0% "entirely discretionary" (see Figure 2). Nearly 40% of enterprises view AI consumption as discretionary spend, leaving it vulnerable to heightened scrutiny.**

FIGURE 2. HOW BUYERS CLASSIFY AI CONSUMPTION SPEND



Source: ETR

While bundling AI into a platform doesn't guarantee success, its value extends beyond price. A tech director of solutions architecture noted that buyers favor embedded AI over custom builds due to built-in security and data grounding to enterprise data.***

WHAT ETR IS HEARING

A tech director of solutions architecture noted that buyers favor embedded AI over custom builds due to built-in security and data grounding to enterprise data.

Ultimately, bundled vendors must win two arguments: first, that the core platform delivers merit, ease of administration, and value; and second, that its embedded AI prevents customers from viewing bundle stickiness as a liability.



Realizing Value Through Salesforce's New Sales, Service, and Industry Editions

It is clear that customers are increasingly seeking simplicity and optionality in AI-enabled SaaS. That preference has a specific ask: buyers want fewer, higher-value editions rather than a sprawling menu of individually negotiated SKUs. Salesforce's own pricing leadership put a number on the problem in a recent conversation with Futurum: a catalog that had grown to roughly 7,000 SKUs, or nearly one for every sales rep the company employs. That sprawl costs customers real value.

**ETR. AI Product Series Theme 2, July 2026, n=600.

***ETR. Insights 469, March 20, 2026.

~7,000

SKUS BEFORE CONSOLIDATION

Individual add-ons were reaching only a small share of the customers who might have used them because negotiating each one added more friction than most buying teams wanted to absorb.

Salesforce's response is to consolidate around three editions, Core, Advanced, and Max Edition for Sales, Service, and Industries, each refreshed to fold in AI and collaboration features that used to sit behind separate purchases: Slack, Premier Success, Tableau Next, and, in the higher tiers, Data Detect, Security Center, Backup & Recover, and Archive. Storage allocations are increasing as well, addressing a separate complaint Salesforce said it has heard directly from customers about the cost of keeping data on its platform.

NOW FOLDED INTO EVERY EDITION

Slack, Premier Success, and Tableau Next ship in every edition; Data Detect, Security Center, Backup & Recover, and Archive are added in the higher tiers.

Similarly, Salesforce's Agentic Enterprise License Agreement (AELA) bundles unmetered use of consumption-priced products Agentforce and Data Cloud, and MuleSoft's and Informatica's consumption-based offerings, into one agreement over a typical two-year term, removing the guesswork buyers previously faced trying to estimate usage for products they'd never run at scale before.

Specifically for agentic products, buyers are pushing back against being metered for every discrete action an AI agent takes. Salesforce's own experience with Agentforce illustrates why: its earliest pricing metered individual actions and voice interactions, which gave customers granular control but made usage challenging to size in advance. Salesforce is now shifting toward pre-built, packaged agents, priced against a defined outcome instead: a new help agent bills per resolved case, paid for in Flex credits, the same currency customers can redeem across other consumption products if actual usage comes in lighter than expected. Salesforce intends to build additional agents that will use an outcome-based approach in the future.



The Five Pillars Designed to Elevate the Platform Experience

Ultimately, Salesforce is framing its own redesign around five design pillars, and each one maps onto a specific piece of buyer behavior already showing up in the data rather than reading like marketing language layered on after the fact.

AI in every edition, to deliver value immediately.

01

Salesforce's AI capabilities, historically confined to its top tier, are being rolled down into the base editions most customers already buy. This is the direct answer to the packaging-favorability pattern in ETR's AI Product Series data: current users of embedded AI features overwhelmingly resist paying anything extra for them once they're bundled in, with 35.8% of Slack AI users saying they'd pay nothing at all if that access became a separate line item. Putting AI in every edition isn't just generosity; it's pricing to match how buyers already behave.

Slack is built in to let teams work wherever they are.

02

Folding Slack into every edition rather than selling it as a parallel purchase removes a second sales cycle and a second point of integration tax, the same fatigue this piece opened on. It's a specific bet that distribution beats a standalone product line, and it only works if Slack's AI features earn their place inside the bundle rather than riding along on the platform's name.

Customer success is included as a partner to ensure delivery of outcomes.

03

This approach addresses a problem the data show is growing, not shrinking. ETR's Q16 Value vs. Cost data shows the share of enterprises saying AI's value outweighs its cost slipped from 53% in the January 2025 AI Product Series survey to 48.2% in July 2026 (n=600 each period), with the lost ground moving into "equivalent" rather than outright negative. Software that isn't adopted well enough to show value doesn't get credit for the value it could have delivered. Bundling in the enablement resource is a direct hedge against that erosion, assuming it's staffed to matter and not just listed on a slide.

Packaged around the role and work to be done, rather than features to purchase.

04

This is the same logic behind Salesforce's shift toward outcome-based agent pricing, resolutions instead of metered actions, extended to the edition structure itself. Customers simply need to buy a Salesforce edition tailored to their role, and they are equipped with all the functionality they need to achieve their desired outcomes. It's a buyer-favorable idea: a customer seeking an outcome doesn't need to reverse-engineer which features add up to that outcome.

Platform simplicity, efficiency, security, and scalability.

05

This is the commercial-architecture layer, fewer SKUs, standardized discounting, consolidated editions, dressed in outcome language. A vendor that removes friction from buying into that category has a real structural advantage regardless of how the other four pillars land.

35.8%

SLACK AI USERS WHO'D PAY \$0 IF UNBUNDLED

48.2% ▼ -4.8 pts

SAY AI'S VALUE OUTWEIGHS ITS COST

Source: ETR, AI Product Series, July 2026 (n=600); Q16 Value vs. Cost tracked against January 2025 (n=600 per period).



Conclusion: What This Means for Buyers

The consolidation trend documented above is a signal, not a mandate. Fewer vendors is not automatically better; it is better when it removes real integration, governance, and pricing friction without trading away the capabilities the business actually needs. Enterprise software buyers evaluating their own AI stack should treat the following as a working checklist rather than a foregone conclusion.

- 01 Inventory before negotiating.**
Most organizations cannot yet name every AI tool that touches their data, largely because adoption has outpaced procurement. Build that inventory first, including tools acquired below procurement's radar, before entering any consolidation or renewal conversation. A vendor cannot be evaluated for fit against systems nobody has fully mapped.
- 02 Price the agent, not the seat.**
Any platform or vendor still pricing primarily on a per-seat basis should be pressed to explain how that maps to agentic workloads that run continuously and span multiple systems. If it can't, budget forecasts built on seat counts will miss actual spend, sometimes by a wide margin.
- 03 Ask for reallocation rights, not just a lower rate.**
A fixed basket of products locks buyers into today's guess about tomorrow's usage. Contract terms that let spend move across a portfolio as needs shift, including toward products or agents that don't exist yet at signing, better protect against that guesswork than a bigger discount on a static bundle.
- 04 Separate embedded value from bundling pressure.**
Buyers should test whether bundled AI capabilities hold up against their standalone equivalents in terms of quality and fit, rather than accept them by default because they've already paid for them. Bundling that wins on convenience but loses on capability still costs the business something; it just moves the cost off the invoice.
- 05 Fund adoption as part of the deal, not as an afterthought.**
A platform earns its consolidation case only if the organization actually uses what it bought. Enablement, training, and change management should be scoped and staffed as part of the purchase, not treated as a line item to cut when budgets tighten.
- 06 Keep governance in the room from the start.**
Security and legal review should run alongside the commercial negotiation, not after it. A consolidated platform still needs a clear answer on where prompts and outputs are stored and who can see them; fewer vendors make that answer easier to get, so it is not automatic.

Buyers who work through this checklist before signing will spend less time paying down an integration and governance tax later and more time putting a platform's AI capabilities to work, delivering value to users and the enterprise.



Important Information About This Report



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Salesforce is a cloud-based customer relationship management platform that has expanded into a broader enterprise software suite spanning sales, service, marketing, commerce, and data management, with Agentforce and Data Cloud extending the platform into agentic AI. Salesforce competes with a wide range of CRM, service, and enterprise AI vendors, and is widely adopted across industries for its ecosystem of native and partner-built applications.

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