

## 电子 Technology

### 阿里云栖大会聚焦（3）：AI 驱动下的 SaaS 与 CRM 未来格局演进

Alibaba Cloud Computing Conference Focus (3): The Future Landscape Evolution of SaaS and CRM Driven by AI

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Flash Analysis

(Please see APPENDIX 1 for English summary)

#### 事件:

9月24日，云栖大会“AI基础设施进化”专场在杭州举办，当日下午，“阿里云上的Salesforce：从CRM到AI CRM，引领客户智能化体验”分会场分享了AI时代下SaaS产品与CRM系统的深刻变革，从智能Agent的演进路径到可信数据底座构建，再到生态协同与智能运营，为企业的数字化转型与智能化升级指明了方向。

#### 点评:

在智能化交互与主动服务时代，传统SaaS产品将从“被动响应”转向“主动洞察”。现阶段的AI Agent主要体现在三个发展层次：首先是预测型AI，如Salesforce的Einstein引擎每周可提供2亿次精准预测，主要聚焦于历史数据分析和趋势预测；其次是Copilot模式，基于大语言模型提供文字生成和检索能力，但仍需人工主导和确认；第三是向Agent智体的演进，能够实现意图识别、情境感知、自主决策和响应输出的连续动作序列。未来的Agent将具备更强的自主性和决策能力，从单一的AI Action组件发展为多Agent协同的智能网络。预计在5-10年时间维度下，Agent将成为“意图理解操作系统”的核心，能够理解用户意图并控制整个流量分配权，从而重构软件的主导权。人与AI的交互模式将从“人使用Agent”演进为“人与多个Agent协同”，最终达到Agent间的自主协作状态，实现真正的智能化业务流程自动化。

AI时代的SaaS变革正在从根本上重新定义软件产品的三大核心维度，构建起全新的技术和商业生态。在产品形态层面，SaaS产品将实现“三化”突破：交互拟人化使自然语言成为软件的源代码，用户无需掌握复杂操作界面即可通过对话完成业务流程；功能原子化将传统的大型复杂软件进一步解构，每个AI Agent专注解决特定问题，如从万份简历中筛选合适候选人；服务主动化则让软件从被动响应转向主动洞察和预警，实时感知业务变化并提出行动建议。其次，开发范式层面正经历“以模型为中心”的根本性转变，代码生成能力的快速提升将重新定义整个数据自动流动体系。目前阿里云代码生成采用率已从25%提升至50%，预计将进一步达到80-90%，这不仅提升了工程师效率，更重要的是实现了从“看得见的自动化”到“看不见的自动化”的飞跃，让2个人的效率相当于过去40-50人的开发团队。

从数据治理与模型可控性的视角看，AI SaaS的核心竞争力将落脚在“可信度”与“可解释性”上。随着各行业对合规与安全的严格要求，未来企业所采用的AI引擎必须建立在本地化数据底座之上，并结合企业私有数据、权限管理和行业定制规则完成严格隔离与审计。大模型在训练和推理环节须提供透明的决策链路，支持可视化的因果追踪与风险评估。这样不仅提升了业务主管对AI建议的信任度，也为引入监管报告和内部审计提供了技术手段，推动整个CRM生态实现“安全优先、效率至上”的平衡格局。

未来的CRM产品不再是单一厂商的闭环系统，而是基于开放API与行业联盟构建的智能大脑——它能够集成供应链管理、金融风控、供应商评级、第三方数据源等多维度服务。借助Agent编排引擎，不同系统之间的信息流和工作流将实现无缝衔接：比如在大客户项目推进时，CRM自动调取合同系统、审核财务及法务流程，然后触发供应商履约监控和售后支持，最终生成全流程绩效评估报告。正是这种跨域协同与智能化闭环，赋予企业更强的数字化韧性及协作效率，使AI SaaS成为推动业务持续增长与创新的核心引擎。

风险提示：1）行业竞争加剧；2）地缘政治不确定性

图 1: AI 将从三个方面加速应用



资料来源：云栖大会, HTI

图 2: 软件的变革进程更快



资料来源：云栖大会, HTI

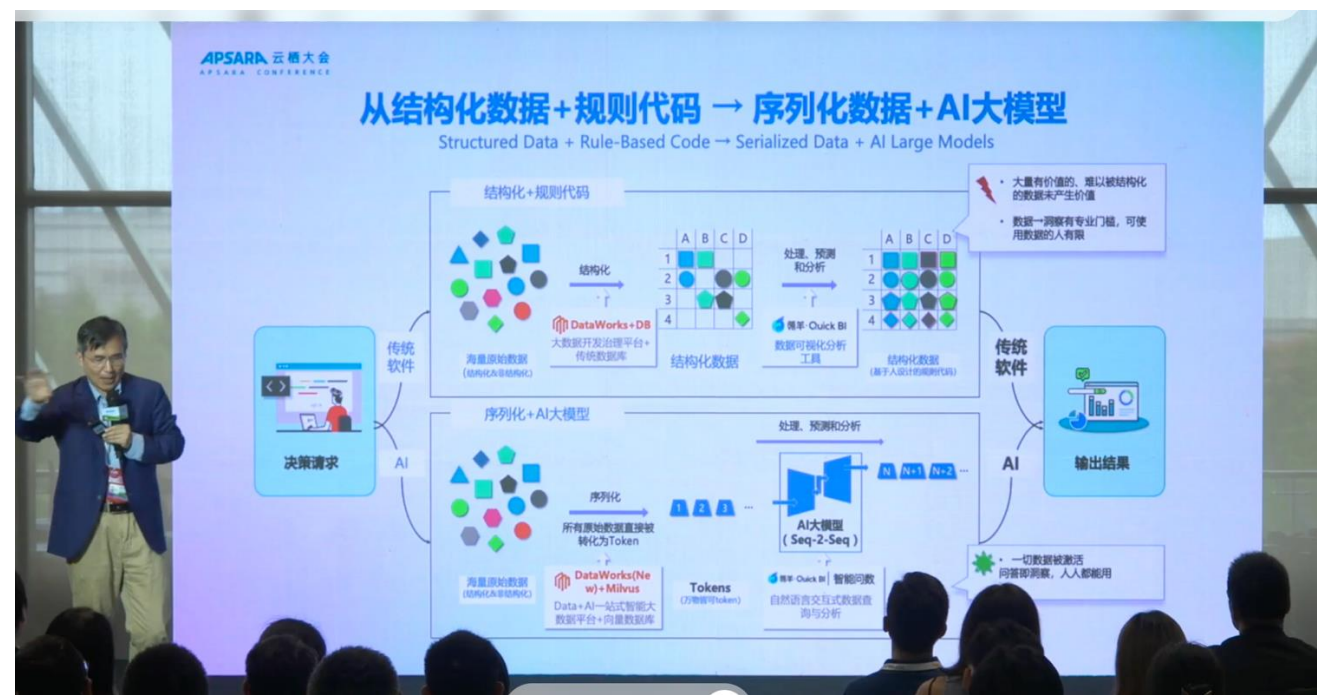


图 3: 从基于人的规则代码到 AI 生成



资料来源：云栖大会, HTI

图 4: 从结构化数据+规则代码到序列化数据+AI 大模型



资料来源：云栖大会, HTI

## APPENDIX 1

### English Summary:

#### Event:

On September 24th, the "AI Infrastructure Evolution" special session of the Yunqi Conference was held in Hangzhou. In the afternoon of the same day, "Salesforce on Alibaba Cloud: The "From CRM to AI CRM, Leading Customers to Intelligent Experience" sub-forum shared the profound changes in SaaS products and CRM systems in the AI era, from the evolution path of intelligent agents to the construction of a trusted data foundation, and then to ecological collaboration and intelligent operation, pointing out the direction for the digital transformation and intelligent upgrade of enterprises.

#### Comment:

In the era of intelligent interaction and proactive service, traditional SaaS products will shift from "passive response" to "proactive insight". At present, AI agents mainly manifest in three development levels: Firstly, predictive AI, such as Salesforce's Einstein engine, which can provide 200 million precise predictions per week, mainly focusing on historical data analysis and trend prediction; The second is the Copilot mode, which provides text generation and retrieval capabilities based on large language models, but still requires human guidance and confirmation. The third is the evolution towards an Agent intelligence, capable of achieving a continuous sequence of actions including intention recognition, context awareness, autonomous decision-making, and response output. Future agents will have stronger autonomy and decision-making capabilities, evolving from a single AI Action component to a multi-agent collaborative intelligent network. It is expected that within a time dimension of 5 to 10 years, Agents will become the core of "intent-understanding operating systems", capable of understanding user intentions and controlling the entire traffic distribution rights, thereby redefining the dominance of software. The interaction mode between humans and AI will evolve from "humans using agents" to "humans collaborating with multiple agents", ultimately achieving an autonomous collaborative state among Agents and realizing true intelligent business process automation.

The SaaS revolution in the AI era is fundamentally redefining the three core dimensions of software products and building a brand-new technological and business ecosystem. At the product form level, SaaS products will achieve "three breakthroughs": The personification of interaction makes natural language the source code of the software, allowing users to complete business processes through dialogue without mastering complex operation interfaces; Functional atomization further deconstructs traditional large and complex software. Each AI Agent focuses on solving specific problems, such as screening suitable candidates from tens of thousands of resumes. Service proactiveness enables software to shift from passive response to proactive insight and early warning, perceiving business changes in real time and proposing action suggestions. Secondly, the development paradigm level is undergoing a fundamental transformation towards "model-centeredness", and the rapid improvement of code generation capabilities will redefine the entire automatic data flow system. Currently, the adoption rate of code generation on Alibaba Cloud has increased from 25% to 50%, and it is expected to further reach 80-90%. This not only enhances the efficiency of engineers but more importantly, it marks a leap from "visible automation" to "invisible automation", making the efficiency of two people equivalent to that of a 40-50 development team in the past.

From the perspective of data governance and model controllability, the core competitiveness of AI SaaS will lie in "credibility" and "explainability". With the strict requirements for compliance and security in various industries, the AI engines adopted by enterprises in the future must be built on a localized data foundation and combined with enterprise private data, permission management, and industry-customized rules to achieve strict isolation and auditing. Large models must provide transparent decision-making links in the training and inference stages to support visual causal tracking and risk assessment. This not only enhances the trust of business managers in AI suggestions, but also provides technical means for introducing regulatory reports and internal audits, promoting the entire CRM ecosystem to achieve a balanced pattern of "safety first, efficiency supreme".

The future CRM products will no longer be closed-loop systems of a single vendor, but intelligent brains built on open apis and industry alliances - they can integrate multi-dimensional services such as supply chain management, financial risk control, supplier rating, and third-party data sources. With the help of the agent-based orchestration engine, the information flow and workflow between different systems will be seamlessly connected: for instance, when a major client project is being advanced, the CRM will automatically retrieve the contract system, review the financial and legal processes, then trigger the supplier performance monitoring and after-sales support, and ultimately generate a full-process performance evaluation report. It is precisely this cross-domain collaboration and intelligent closed loop that endow enterprises with greater digital resilience and collaboration efficiency, making AI SaaS the core engine driving continuous business growth and innovation.

**Risks:** 1) Intensified industry competition; 2) Geopolitical uncertainties

## 附录 APPENDIX

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