

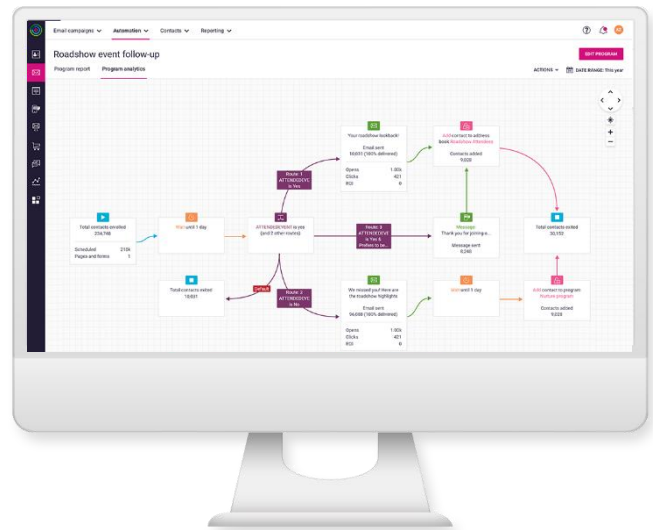


Service Definition Overview



Dotdigital

Dotdigital is a cross-channel marketing automation platform and services provider that already helps 4,000+ brands devise successful, personalised marketing campaigns across multiple channels (email, SMS, WhatsApp, social, live chat, in-app push, and web). Paired with its Microsoft Dynamics 365 CRM integration, marketers are able to achieve data-driven results.



Connect

Dotdigital seamlessly connects with your most valuable business systems



Empower

Tech that does the hard work for you, from predictive recommendations to lifecycle reporting



Communicate

Cross-channel reach so you can engage with your audience wherever they are



Ecommerce



CRM



Offline



Webhooks



A.I.



Automate



Collaborate



Personalize



Profiling



Report



Segment



Email



SMS



Social



Ads



WhatsApp



Web



Chat

Speed and ease-of-use are at the core of what we do, so our cross-channel marketing features can help you reach your goals faster. If you want to increase marketing ROI, boost sales revenue, drive more engaged contacts, or boost donations – Dotdigital has the tools and integrations you need to make it happen.

Services

Whilst we offer an interface-led solution and have built a platform with usability in mind, we still offer a variety of people services to help you achieve your marketing goals.

"The training sessions were thorough, tailored to our team's needs, and he explained everything so clearly.."

– Emily, Villa Plus



Technical support

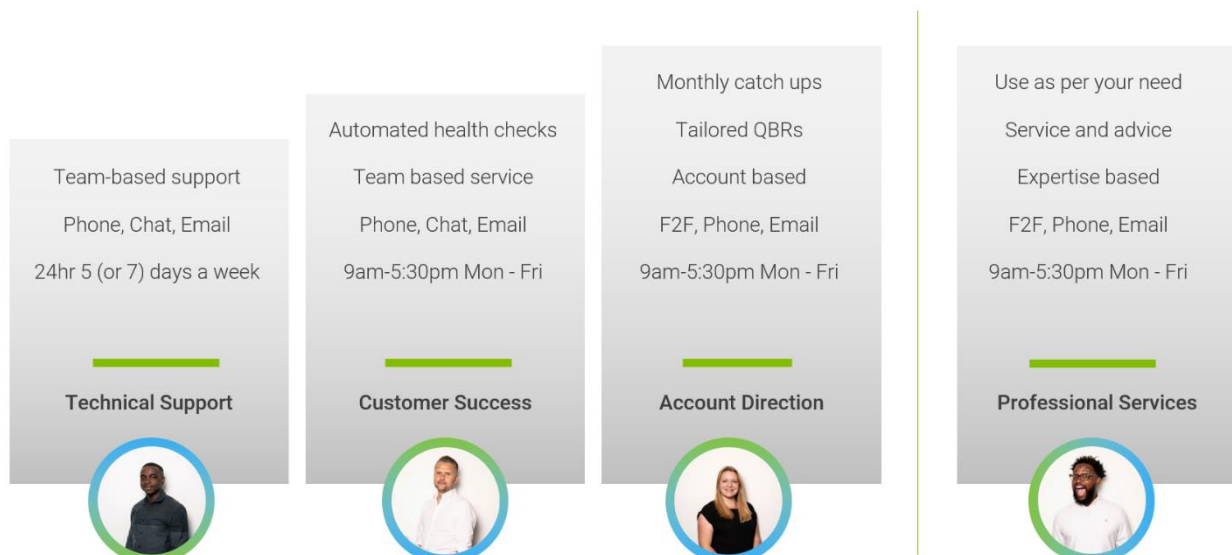
Available 24 hours, 7 days a week via live chat (and 24/5 via phone), our award-winning support team are real people, ready to help you with any query or challenge by phone, live chat, or email. Average call wait time is under 10 seconds.

Customer Success and Account Management

Depending on the level you require, you will be given access to our Customer Success team and/or dedicated account management. Whether it's day-to-day guidance or strategic advice, our teams are on hand to help you make the most of your account with us and achieve your goals.

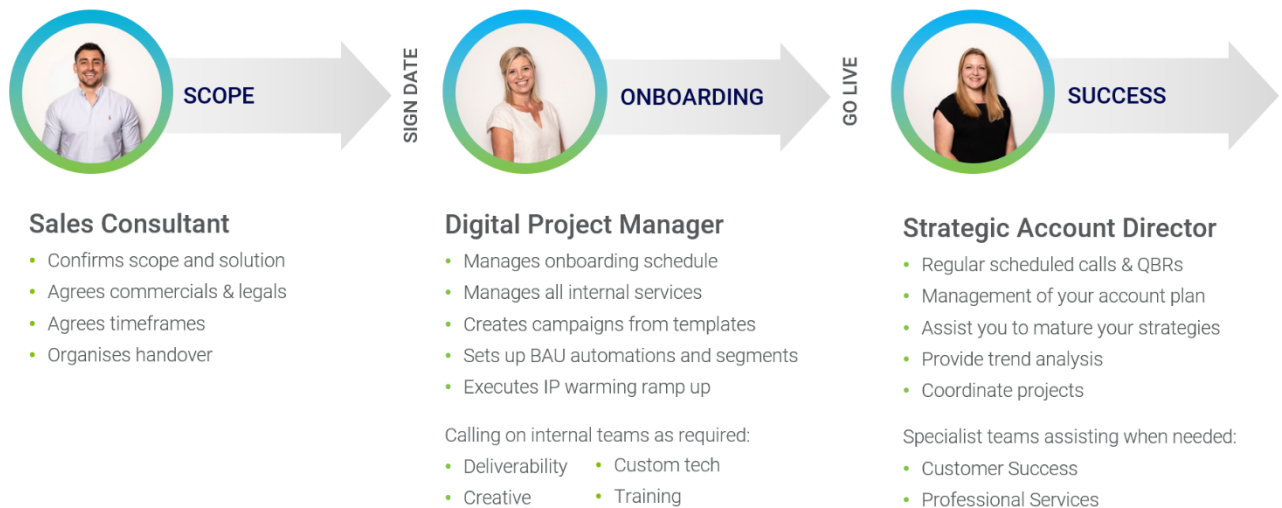
Professional Services

Additional expertise and assistance is available when you need it. Our professional services team is made up of experienced project managers, custom technical solutions, training, creative studio, strategic consultancy, and deliverability experts that beat industry benchmarks.



Getting started

Our dedicated professionals will get you and your team on board, speedily and seamlessly, without a glitch.



A typical Dotdigital onboarding

- Upon signing your contract with us, you will receive an onboarding Scope of Works document, that sets out exactly what will be delivered to fulfil the Service Agreement between your business and Dotdigital. This document needs to be read and signed by you for the transaction to be completed.
- A step-by-step onboarding project plan, created by your dedicated Onboarding Manager, including dynamic GANTT chart, will detail all tasks and sub-tasks, with full descriptions and supporting documentation. This is created and accessed within our online SaaS project management tool, and offers real-time progress tracking, instant messaging of team members, online documentation repository, and more.
- We also provide a deliverability questionnaire, to ensure we fully capture your deliverability requirements before a deliverability migration plan is created.
- A vast repository of information is available to you through our Help centre, Developer docs, and Training Hub. The Help centre is a searchable database of help articles and is accompanied by a Developer Hub with detailed technical documentation. Our Training Hub comprises comprehensive training videos showing users how to make the most of each feature. These tutorials are supplementary materials to accompany face to face or 'live online' training delivered by one of our professional trainers.

"My team left their onboarding session with beaming smiles."

Richard Jones, Head of CRM, T.M. Lewin

About our customers and partners

Success stories

We work across a range of sectors and have a fast-growing client base across not-for-profit, higher education, membership organisations and other regulated bodies and institutions globally.

Customers use our platform to increase engagement from their contacts, subscribers, customers, and members, by sending beautiful, professional campaigns that inspire trust and action. Lapsed contacts can be re-engaged with automated, yet personalized win-back programs, and so much more. Go to our website to find success stories that are relevant to your industry.

Charities



Higher Education



Institutions and regulated bodies



Key integration partners include:



Security & Trust

We understand that you must be able to entrust your chosen marketing automation provider with one of your most valuable assets – data. We continue to invest in technology and resources to build security and privacy into our platform.

Committed to the security of all our clients:

- Global infrastructure and security team
- ISO 27001, ISO27701, ISO14001 certified
- Platform status updates
- Multi-service uptime reports
- Industry-leading security and infrastructure
- EU Platform locations & data storage

Our global list of growing accreditations



Read more at dotdigital.com/trust-center



ISO 27001 Certificate Number: 18479

Other key information

Pricing Overview

Please refer to the pricing document (PDF) which is available to download on our G-Cloud listing. Our pricing scales based on your contacts and the volume of messages you plan to send, so in the pricing document you will find three examples that demonstrate how this works out in practice.

How buyers can terminate a contract

The services are provided by Dotdigital for the initial term of an order and shall (by default) automatically renew for successive 12-month periods, unless terminated at the end of either an initial or renewal term on at least 30 days' written notice.

In addition to the above, in accordance with our terms, both the buyer and the supplier can terminate a contract where:

- the other commits a material breach of contract; or
- either party becomes insolvent (or otherwise ceases or threatens to cease trading), enters into an arrangement with creditors or has a receiver or administrator appointed.

Where a contract is terminated before the expiry of the initial or then-current renewal term (unless termination is due to a material breach of contract by Dotdigital), all remaining charges for the unexpired portion of the relevant term are payable.

Order and invoicing

Dotdigital will raise a 'Service Agreement' that includes all the line items required to get up and running with the account. Once the 'Service Agreement' has been signed and returned, an invoice will be generated to reflect the 'Service Agreement'.

Once the invoice has been issued, clients have 14 days payment terms as standard.

Data and compliance

At Dotdigital, we are committed to ensuring the highest standards of data protection and privacy for our customers. Our compliance framework is designed to meet the requirements of various global regulations, including the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) and provides detailed information on various global privacy regulations, including the EU-U.S. Privacy Shield, Australian Privacy Principles, and Canadian Privacy Law, through its Trust Centre.

GDPR Compliance

- Dotdigital adheres to the GDPR, which imposes strict rules on the handling of personal data of individuals within the European Union (EU). Our GDPR compliance measures include:
- **Data Protection Principles:** We follow the principles of data minimization, accuracy, storage limitation, integrity, and confidentiality.
- **Data Subject Rights:** We ensure that individuals can exercise their rights to access, rectify, erase, restrict processing, and object to the processing of their personal data.
- **Data Breach Notification:** We have procedures in place to detect, report, and investigate personal data breaches.
- **Data Protection Officer (DPO):** We have appointed a DPO to oversee our data protection strategy and ensure compliance with GDPR requirements.

CCPA Compliance

- Dotdigital also complies with the CCPA, which grants California residents specific rights regarding their personal information. Our CCPA compliance measures include:
- **Consumer Rights:** We provide California residents with the right to know what personal information we collect, the purpose for which it is used, and the right to request deletion of their personal information.
- **Opt-Out Rights:** We offer California residents the ability to opt out of the sale of their personal information.
- **Non-Discrimination:** We do not discriminate against individuals who exercise their rights under the CCPA.

Security Measures

- We implement robust security measures to protect personal data from unauthorised access, alteration, disclosure, or destruction. Our security practices include:
- **Encryption:** We use encryption to protect personal data both in transit and at rest, see our full "Encryption Policy" attached along with this RFP.
- **Access Controls:** We enforce strict access controls to ensure that only authorised personnel have access to personal data.

- **Regular Audits:** We conduct regular audits and assessments of our data protection practices to ensure ongoing compliance with applicable regulations.

Contractual Commitments

Our relationships with customers are supported by contractual commitments that include security standards, support, and timely notifications in accordance with GDPR and CCPA requirements.

Shared Responsibility

While Dotdigital is fully committed to helping our customers comply with data protection regulations, it is important to recognise that compliance is a shared responsibility. We encourage our customers to understand their obligations and take the necessary steps to personal data. For more information about our compliance and legal practices, please visit our [Trust Centre](#).

Staff Awareness

Mandatory security induction training is provided, which is annual thereafter. Quarterly phishing exercises with ad-hoc training throughout the year. This is created, delivered, and tracked via the learning management system we use.

Global & Regional Data Privacy & Regulations

Dotdigital complies with its obligations under the GDPR. Specifically, as a processor, we have taken steps to ensure that we comply with the requirements of Article 28 of the GDPR and other global data privacy regulations. These are set out in our [data processing agreement](#). Our team has compiled a list of [technical and organizational security measures](#) that we employ to keep your data safe.



ISO 27001
ISO 27701
ISO 14001

0026

Cert No. IASME-CEP-001683

Data Privacy Concerns

Dotdigital carries out a selection process where we evaluate the data processing practices of any proposed sub-processor that might have access to client data. This includes reviewing their security and privacy practices. Data protection laws permit sub-processors to be engaged, provided that the equivalent safeguards from client agreements are reflected with these sub-processors. Dotdigital has entered into contracts with the organisations listed on our [Trust Centre](#) to ensure the safeguarding of personal data, including entering into Data Processing Agreements reflecting the obligations under the GDPR, passing down the measures of the EU Model Contract Clauses to ensure that all client data is protected.

Platform Hosting

Azure Locations

- For EU/UK clients, Primary DC located in Amsterdam with Secondary DC located in Ireland.
- For US clients, Primary DC located in Virginia with Secondary DC located in Iowa
- For APAC clients, Primary DC located in Sydney with Secondary DC located in Melbourne

GCP Locations

- [EU/UK](#)
- [US](#)
- APAC - DC located in Sydney

Regulatory Compliance and Security

At Dotdigital, we take your security, and ours, seriously. We've put the necessary measures in place to keep your data safe and secure. We've implemented an ISO 27001 certified Information Security Management System (ISMS) which identifies and manages risks to the confidentiality, integrity, and availability of information. You might find our management-approved [Information Security Policy](#) useful. Dotdigital complies with its obligations under the GDPR. Specifically, as a processor, we have taken steps to ensure that we comply with the requirements of Article 28 of the GDPR and other global data privacy regulations. These are set out in our [data processing agreement](#). Please find "ISO 27001 Certificate" attached along with this RFP.

Business continuity and disaster recovery

Our BC plan has been independently verified in our ISO 27001 audits. We currently cannot share our BC/DR plans due to the level of PII and sensitive info they include. Any specific question(s) we are happy to answer on request. BC and DR will always be invoked at leadership/operations director level.

The Dotdigital platform is built using redundancy and load balancing at every level; meaning a single component failure should not result in a service disruption. Our service operations team is responsible for testing and deploying the plan. We are constantly testing and improving our BCP, which includes bi-monthly meetings for review and analysis involving key stakeholders and technical managers responsible.

Additionally:

- Platform recovery exercises are performed quarterly. Scenarios tested include complete outage of primary facility, DB corruption, and hardware failure.
- Client data has an RPO of 5 mins
- RTO - 24 hours

Quality Management

Our Deliverability team manages and works with clients to ensure the quality of outgoing communications. Our software team has an internal review and change management process to ensure the software is up to date and working to the same or higher standards for the duration of client contracts. In terms of data quality, Dotdigital only has access to personal data supplied or requested (through features of the platform) by the client, so this remains within the client's control.

Go to dotdigital.com to find
out more.

