

The background of the left slide features a blue-tinted coat of arms of the Commonwealth of Massachusetts. It includes a shield with a Native American figure holding a bow and arrow, a star, and a crest with an arm holding a sword. A ribbon at the bottom reads "MON DROIT".

Ziipline

Ziipline

Service Definition

The Salesforce logo, consisting of the word "salesforce" in a white, lowercase, sans-serif font inside a white cloud-like shape.

salesforce

CONFIDENTIAL

Delivery Services

Our Approach to Digital Transformation

Ziipline

Our Approach

Strategy-first | We start with business goals, not just functional asks

Value-driven solutions | Prioritise solutions that deliver the maximum value to the organisation

Iterative delivery | Fast feedback via hands-on working solutions.

Stakeholder aligned | Architecture is shaped together across business + IT stakeholders

Guiding Principles

Strong, scalable foundations | Invest time early in ensuring robust technical foundations with strong data integrity

Agile, iterative delivery | Sprint-based model, embedded teams, fast feedback

User-centric design | Design for adoption-first, solutions that users actually want to use

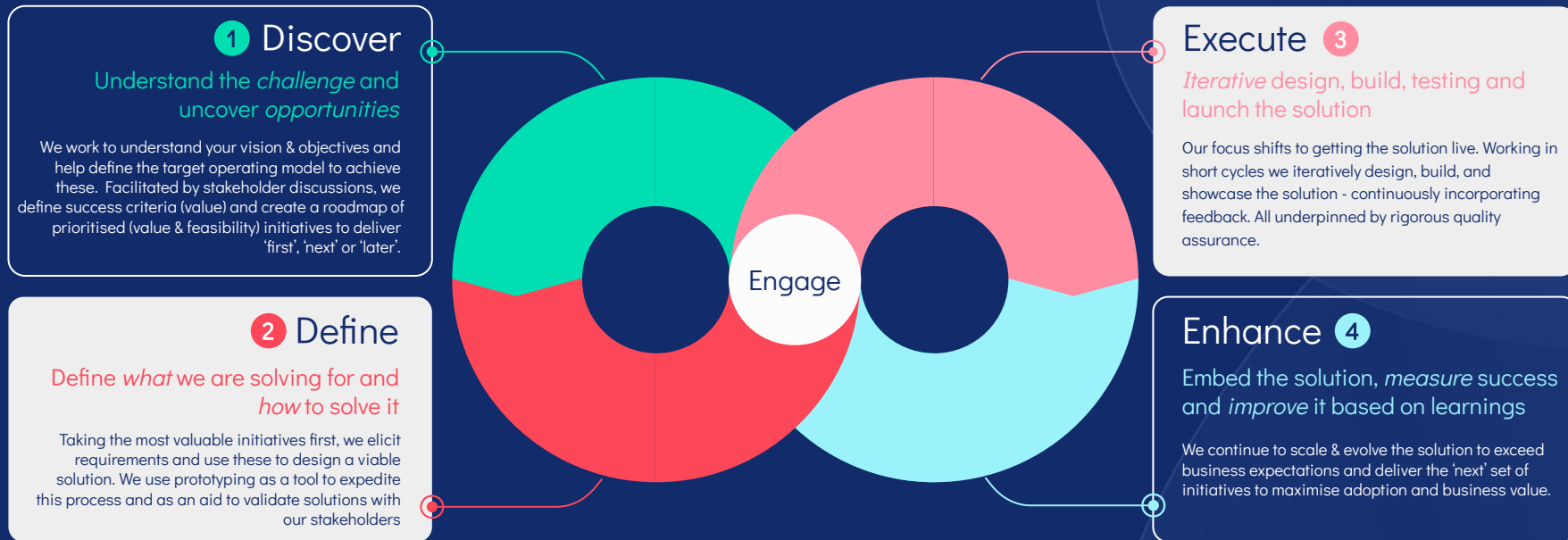
Rapid prototyping | We use prototypes to prove feasibility and ensure early buy-in from all stakeholders

AI value realisation | A prototype-driven approach to finding and delivering AI use cases

Our Approach

Ziipline

Our approach is based on phases of **Discovery**, **Definition**, **Execution** and **Enhancement** underpinned by holistic governance and a 'one-team approach' in the way that we Engage with customers. These phases are designed to take our customers on a journey to deliver value fast. We have proven success with this approach as it allows us to deliver a robust solution in the shortest amount of time, enabling agility, maintaining quality and incremental change, while providing commercial surety.



As part of the Ziipline delivery approach, robust governance is fundamental to how we **Engage** with customers. With all of our customers we take a one-team approach, adapting to our customers' existing delivery and technical governance approaches and capabilities where required.

1

Discover

Understand the challenge and uncover opportunities

We work to understand your vision & objectives and help define the target operating model to achieve these.

Facilitated by stakeholder discussions, we define success criteria (value) and create a roadmap of prioritised (value & feasibility) initiatives to deliver 'first', 'next' or 'later'.

Objectives

(What we want to achieve?)

- Understand the current state & problem space
- Confirm the vision & identify 'value'
- Determine desirability, feasibility & viability
- Determine priority - 'what to focus on'
- Engage key stakeholders & generate excitement
- Define success metrics

Key Activities

(How we achieve it?)

- Discovery workshops
- Stakeholder interviews & shadowing
- Current process & system walkthroughs
- Journey mapping
- Roadmap definition
- Demos *
- Existing platform org assessment **

Outcomes

(Agreed / understood to proceed)

- Vision & objectives
- Success criteria & metrics
- Prioritised & estimated roadmap
- Product & licencing

* Prototypes / Demos used to help define the vision and engage Stakeholders

** If an existing Salesforce Customer

2

Define

Define what we are solving for and how to solve it

Taking the most valuable initiatives first, we elicit requirements and use these to design a viable solution.

We use prototyping as a tool to expedite this process and as an aid to validate solutions with our stakeholders.

Objectives

(What we want to achieve?)

- Agree scope 'What ...'
- Create solution designs 'How ...'
- Confirm delivery plan & estimates 'When ...'
- Identify dependencies

Key Activities

(How we achieve it?)

- Requirements workshops
- Process mapping
- Architecture & solution designs
- Data migration review *
- Prototyping*
- Project planning
- Playbacks & refinement

Outcomes

(Agreed / understood to proceed)

- Scope & estimates
- Delivery plan
- Solution architecture
- Test strategy
- Data migration strategy *

* If data migration is required

3

Execute

Iterative design, build, testing and launch the solution

Our focus shifts to getting the solution live. Working in short cycles we iteratively design, build, and showcase the solution - continuously incorporating feedback.

All underpinned by rigorous quality assurance.

Objectives

(What we want to achieve?)

- Deliver on business objectives
- Develop & deploy technical solution
- Embed solution with the end users
- Prepare for long-term adoption and continuous improvement

Key Activities

(How we achieve it?)

- Sprint planning
- Requirements refinement
- DevOps & environment setup
- Iterative design & build
- Show & tell demos
- Test planning, execution & remediation
- Data migration & reconciliation *
- Business readiness
- Go/No-Go decision
- Go-Live & hypercare

Outcomes

(Agreed / understood to proceed)

- Documented solution designs
- Quality-assured, operational Solution
- Business acceptance
- Knowledge transfer & handovers

* If data migration is required

4

Enhance

Embed the solution, measure success and improve it based on learnings



We continue to scale & evolve the solution to exceed business expectations and deliver the 'next' set of initiatives to maximise adoption and business value.

Objectives

(What we want to achieve?)

- Transition to Customer Success
- Provide insights & recommendations
- Scale & evolve the solution to meet ongoing needs
- Identify new opportunities to maximise business value

Key Activities

(How we achieve it?)

- Regular reviews and lessons learned
- Iterative solution enhancements
- Issue triaging & resolution
- Review, refine and prioritise the roadmap backlog & initiatives
- Benefits realisation / measurement
- Salesforce release preparation
- User enablement

Outcomes

(Agreed / understood to proceed)

- Centre of excellence
- Roadmap prioritisation and initiative setting
- User enablement, optimisation & adoption tracking
- Business benefit realisation
- Customer success planning
- Deliver additional value through Customer Success

5

Engage

Collaborative delivery, aligned governance, working as one team



As part of the Ziipline delivery approach, robust governance is fundamental to how we Engage with customers. With all of our customers we take a one-team approach, adapting to our customers' existing delivery and technical governance approaches and capabilities where required.

Objectives

(What we want to achieve?)

- Set up high performing teams with roles and responsibilities well understood
- Establish clear delivery and technical governance across the delivery lifecycle
- Agree ways of working with the customer (one-team approach)
- Provide clear visibility of progress against the plan
- Manage risks, issues and dependencies etc. effectively

Key Activities

(How we achieve it?)

- Mobilisation
- RACI (Project & Team)
- Delivery planning
- Change control
- Stakeholder engagement
- Ways of working (internal & with customers)
- Delivery & technical governance
- RAAIDD management
- Reporting
- Project close down

Outcomes

(Agreed / understood)

- All stakeholders engaged & aligned
- Governance and reporting structure
- Progress against the plan
- Roles and responsibilities
- Risks and issues etc. understood and/ or mitigated

Onboarding and Offboarding

Included as standard in all our delivery engagements



Onboarding

Project Kick-off & Discovery: We initiate every engagement with a stakeholder workshop to define success metrics and technical requirements.

Environment Setup: Rapid provisioning of Salesforce Sandboxes and configuration of security settings, including MFA and role-based access.

Data Migration: Securely importing legacy data using industry-standard ETL tools (e.g., Mulesoft) with full data validation.

Knowledge Transfer & Training: Comprehensive user enablement through tailored workshops, "Train the Trainer" sessions, and custom user guides.

Offboarding

Data Extraction & Portability: Upon contract termination, Ziipline assists in exporting all customer data in standard formats, such as **CSV** or **ODF**, to ensure zero vendor lock-in.

Service De-provisioning: We follow a structured decommissioning process, ensuring all active sessions are terminated and administrative access is revoked.

Knowledge Handover: Final delivery of updated technical documentation, architectural diagrams, and a transition report to your internal team or a successor supplier.

Data Sanitisation: Post-extraction, we ensure all sensitive project data is securely deleted in accordance with GDPR and agreed sanitisation standards.

Customer Success

Reimagining Salesforce Support



We don't call it managed service intentionally, we deliver **Customer Success**

Managed Service

Reactive and tactical

Narrow expertise & perspective

Missed innovation opportunities

Siloed teams

Customer Success

Proactive partnership

Outcome oriented

Transformation and innovation
at its core

Full-access to Ziipline firepower

Customer Success **Support Model**

Ziipline

What you get *(What we offer as part of the service)*

- An agreed number of hours, tracked per quarter
- A Customer Success Manager as first point of contact
- Access to a dedicated team of Salesforce certified experts
- The ability to raise cases however suits (phone, email, web)
- SLA-based delivery, operating 9am-5pm, Monday - Friday
- Transparent reporting and a self service portal
- Quarterly Business Reviews

How it works *(What we know makes the difference)*

- We create a plan of work for each quarter, based on a roadmap and backlog we build together
- We deliver the ad-hoc work requests you raise as Cases
- We'll follow your SDLC or create one for you
- We'll closely collaborate and keep you updated
- Our work will be underpinned by best practice, thorough testing and years of experience delivering Salesforce solutions



Customer Success in action



Quarterly Hours

We'll create a plan of work for each quarter, based on a roadmap and backlog we build together.

Dedicated CS Manager

Our Customer Success Managers are Salesforce consultants who have been there and done it, and ensure you get access to the right expertise at the right time.

SLA-based delivery

Our work will be underpinned by best practice, thorough testing and years of experience delivering Salesforce solutions. We'll follow your SDLC or create one together.

Transparent reporting

We'll collaborate closely and keep you updated proactively, not only on your usage, but opportunities we've identified for innovation.

Outcome driven innovation

We centre all of our customer innovation around tangible impact and what's going to make a genuine difference to your business.

Ziipline Onboarding Overview and Activities



Business Alignment Review

Assess the maturity of the org & processes to meet your business needs



Objectives

Session to understand the **business strategy, objectives** & underlying **architecture**



Process Mapping

Workshop(s) to support **high level process mapping** for the core functions of the business and understand any **pain points**



Usage & Adoption

Review the usage of the Salesforce **licences** and **adoption** of the system by users



Governance

Review approach to **development**, **testing**, **deployments** & **release** management. Review documentation and devops processes.

Technical Audit

Technical deep dive and audit of the org



Architecture

Assess the Salesforce **clouds**, architectural **landscape** & **integrations**



Data

Audit of data **model**, **storage** usage along with data **quality** review for key objects



Security

Review the security & **permissions** approach, **access controls** & **sharing** model



Automation

Analysis of the **automation approaches** (declarative & programmatic) in line with best practices & scalability



Code

Analysis of coded customisations across **Apex**, **Visualforce**, **Aura** & **LWC** components

Output

Defined next steps for Customer Success to deliver against



Analysis Report

Ziipline findings report along with further reports from Salesforce tools, Codescanner, PMD & other 3rd party tools



Recommendations

Immediate recommendations to **fix issues**, enhance the org and **increase ROI**



Roadmap

Longer term big picture roadmap to realise **maximum value** from Salesforce in line with the **business strategy**



SLAs Incident, Change & Release Management



Priority Level	Description	Target Response Time	Target Restoration Time	Target Resolution Time
P1	Total loss of the services rendering Salesforce unusable (*excluding SF platform outages)	30 Minutes	4 Hours	1 Day
P2	Partial loss service, process still usable via alternative system functionality or workaround	30 Minutes	8 Hours	2 Days
P3	Cosmetic error/minimal business impact	1 Hour	5 Days	TBA (per incident)

Priority Level	Description	Impact Assessment Time
Enhancement 1	Impact assessment of the enhancement ticket - High Priority Enhancement	1 Day
Enhancement 2	Impact assessment of the enhancement ticket - Backlog Enhancement	5 Days

Our Customer Success model can flex to your needs, and operates UK working hours (9am - 5pm) as standard

System Health & Uptime Monitoring



We will ensure your Salesforce system maintains optimal health and uptime through a proactive approach

Platform Monitoring & Alerting

We proactively monitor key Salesforce metrics, CPU usage, SOQL performance, API limits, and load times - with automated alerts for anomalies.

Native tools like Salesforce Optimizer and Health Check are used regularly to flag risks and enforce best practices.

We maintain code quality through static analysis tools such as PMD and CodeScanner, which are embedded into our release process.

We can also advise and support on integrating with your enterprise monitoring tool (e.g. BigPanda, NewRelic, Splunk, etc.).

Health Checks & Uptime Safeguards

Our onboarding and ongoing support include deep technical audits covering code, automation, integrations, and data architecture. We identify bottlenecks and apply optimisations such as refactoring and query tuning.

To protect uptime, we monitor Salesforce Trust Status for platform-level disruptions and rigorously test all major Salesforce releases in sandbox environments to ensure seamless deployment

Where appropriate, we can advise on or implement Salesforce-own or third-party data backup and recovery solutions to support business continuity.

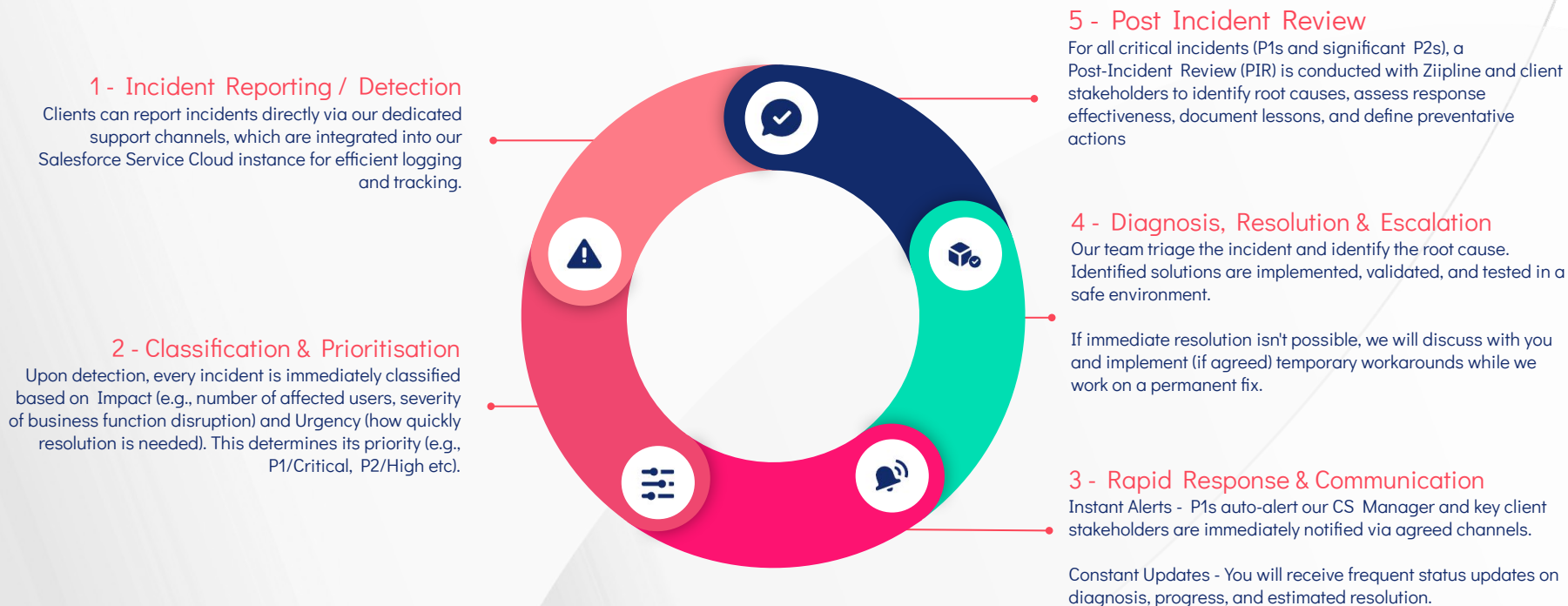
Continuous Improvement Integration

We will feed any observations into our weekly refinement sessions, ensuring quick action on emerging issues. Broader insights are incorporated into roadmap planning, helping maintain platform stability, scalability, and alignment with our client's goals.

This integrated approach ensures Salesforce remains performant and future-ready.

Incidents & Escalations

Ziipline has a robust incident management process for managing and resolving critical incidents and escalations. This is designed to minimise user disruption and restore Salesforce operations swiftly. Our process is structured around clear communication and rapid response.



Data, Security & Permissions Methodology

Ziipline

Ziipline uses a well-defined and disciplined approach to data handling, access control, and system security. We prioritise the protection of your sensitive information while ensuring your Salesforce environment operates reliably. Our practices align with Salesforce's official guidance. We take proactive measures to prevent issues and monitor system performance.

Data Quality & Integrity

Data Hygiene: We maintain data quality through regular audits to eliminate duplicates, inconsistencies, and outdated records, using Salesforce tools and third-party solutions where appropriate.

Standardisation: Our Ziipline Build Standards promote best practices when it comes to data integrity, with a focus on promoting structured data through robust data models, as well as dynamic layouts to promote the right data being captured at the right time.

Data Archiving & Lifecycle: We implement archiving and deletion strategies to retain only necessary data, improving system performance and meeting retention policies. Please be aware that third-party tools may also be recommended (additional involved required).

Security Protocols

Multi-Factor Authentication: MFA is enforced for all users in production to prevent unauthorised access.

IP Restrictions & Session Security: Trusted IP ranges and session settings can be imposed to restrict access and improve login security.

Salesforce Shield (as needed): For enhanced protection, we use features like Platform Encryption, Event Monitoring, and Field Audit Trail to support compliance and activity tracking.

Threat Monitoring: We monitor for suspicious behavior, security advisories, and phishing risks, responding promptly to threats.

Granular Permission Management

Least Privilege Access: Permissions are granted based on the minimum required for each role to limit data exposure.

Permission Set First Approach: We adopt latest best practices by implementing persona-based permission sets to control what users can see do within Salesforce

Role Hierarchies & Sharing Rules: Role-based visibility is enforced through hierarchies, with Sharing Rules expanding access selectively based on business needs.

Access Reviews: Regular audits of user access and sharing settings help identify excess permissions and maintain compliance.

Continuous Improvement

Strategic Roadmapping & Alignment

Our approach is to work collaboratively to understand your vision & objectives and help define the **target operating model** to achieve these. We approach strategic roadmapping with three distinct focuses, with the business goals we're aiming to achieve at the forefront of our thinking:

Desirability

What needs / problems are we addressing?

Viability

Does this provide value / does the business case stack up?

Feasibility

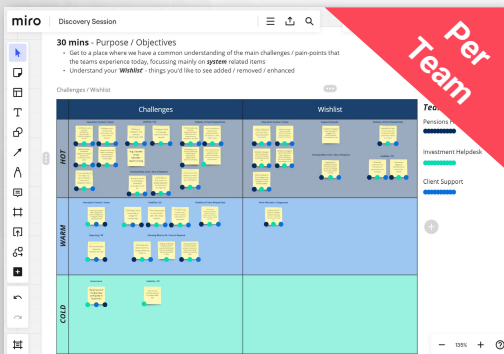
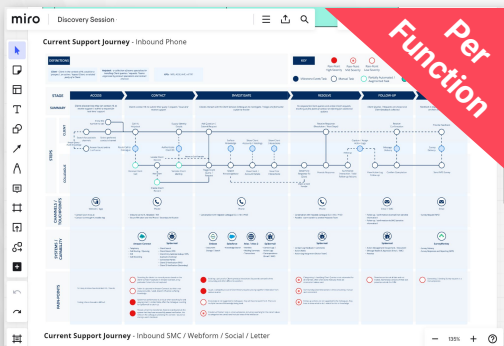
Can this be achieved?

The next slide illustrates the types of inputs we would create to help facilitate the roadmap stakeholder discussions, with the outcome to collectively define **success criteria** (value) and create a roadmap of **prioritised** (value & feasibility) **initiatives** to deliver 'first', 'next' or 'later'.

Strategic Roadmapping & Alignment

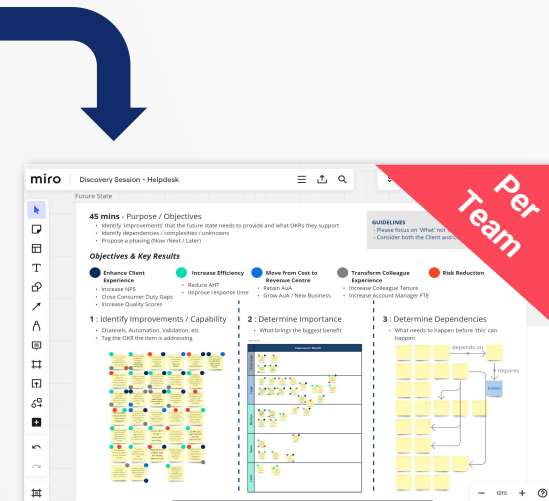
Desirability

What needs / problems are we addressing?



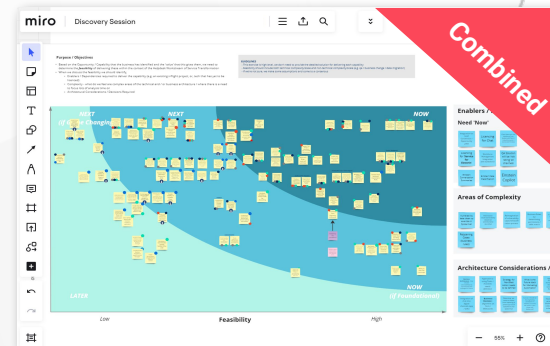
Viability

Does this provide value, does the business case stack up?



Feasibility

Can this be achieved?



Innovation & Insight



Based on our conversations to date, we understand the importance of providing proactive innovation and cross-industry insights that align with your goals. We help our clients continuously innovate to avoid the "Salesforce Value Gap."

This common pitfall occurs when the platform's capabilities stagnate, creating a disconnect between what you have, what you expect, and what's newly possible through Salesforce releases, AppExchange products, and emerging solutions. Our aim is to ensure your Salesforce investment always delivers maximum impact.

How do we achieve this?

We'll use the roadmap to collaboratively review and refine the business drivers and what Salesforce technology can be implemented to enable these. As part of our promise to provide ongoing insights, we offer two focused sessions through our Customer Success model.

Continuous Improvement Planning

Identify and address potential improvements, user pain points, and underutilised functionality. We'll prioritise quick wins from existing features and Salesforce's out-of-the-box capabilities, aiming for incremental, achievable changes that align with your business outcomes.

Frequency: Weekly

Quarterly Innovation Studio

A quarterly Salesforce Innovation Studio will operate similarly but focus on exploring new Salesforce capabilities and identify the ideas that could actually move the dial. Focused time with our experts to spark ideas, recommend exploring new Salesforce functionalities, third-party products, system integrations, and turn innovation into action.

Frequency: Quarterly

Reporting and Governance

Reports & Deliverables



Weekly

Focus on operational performance and immediate insights, ensuring we're always on top of things.

Activity Dashboard: Summary of all cases opened, closed, and pending during the week, including status updates. Provides a quick snapshot of workload, ensuring key work is on track, and to highlight any client input required.

Action Item Tracker (from Refinement Session): Updates on "quick win" tasks and incremental changes committed during the weekly Refinement Session that are in progress or completed. This keeps momentum on continuous improvement visible and ensures accountability for smaller enhancements.

Monthly

Reporting provides a more detailed view of SLA performance and progress of ongoing initiatives, designed for operational managers and key stakeholders.

Monthly Performance Report; details case volumes, SLA attainment and prioritisation.

Refinement Sessions Summary & Actions; summary of discussions from the weekly refinement sessions, including identified user pain points, underutilised features, proposed quick wins, and the committed action plan for the next period

Quarterly

Quarterly deliverables provide a strategic, forward-looking perspective, intended for senior stakeholders and long-term planning

Quarterly Business Review; deep-dive into the past quarter's performance, achievements, and future roadmap. This also includes

- **Innovation Studio Outcomes;** a summary of major initiatives discussed and prioritised during the quarterly Innovation Studio.
- **Strategic Roadmap Review;** covering upcoming Salesforce releases, potential new feature, and a proposed roadmap for strategic enhancements or projects
- **Health Report;** assessment of identified technical debt and proposed refactoring approach

Our Governance Framework



A robust governance framework is crucial for any successful Salesforce delivery. Ziipline's framework is designed to ensure alignment to clients' organisational goals, maintaining platform health, and reducing complexity over time by embedding best practices into every stage of the Salesforce delivery lifecycle. Here's how our governance framework functions and aligns with best practice;

Strategic Alignment & Collaboration

All Salesforce initiatives need to align with your business goals, This helps with prioritisation and allows us to focus on high-value development and preventing ad-hoc solutions.

When defining solutions we assess what capability already exists and evaluate whether we borrow / buy / build a solution

Best Practices & Standards

We maintain strict design and development standards, selecting the most appropriate automation tooling to minimise technical debt, we're not dogmatic 'clicks-not-code'. Our data governance principles ensure quality, consistency, and security, whilst access management enforces the "least privilege" for security and compliance.

Structured Change & Release

All changes follow a defined release management process with thorough sandbox testing and QA. We emphasise user adoption through clear communication and training, ensuring new features are effectively utilised.

Reducing Platform Complexity Over Time

We actively manage technical debt by refactoring code and decommissioning unused features. Our architectural guidance promotes scalability and maintainability. We champion standardisation and simplification across configurations and processes, supported by comprehensive documentation, making the platform easier to manage and evolve.

The image features a solid pink background with several large, overlapping, semi-transparent circles in various shades of pink and magenta. In the top left corner, the Ziipline logo is displayed in white. The main headline is centered in a large, white, sans-serif font. Below the headline, a tagline is centered in a smaller, white, sans-serif font.

Ziipline

Unlocking Outcomes on Salesforce.

Delivering Salesforce transformation with start-up agility, on any scale.