

IBM Consulting



G-Cloud 15 IBM - Salesforce Consulting Services

Service Definition Document

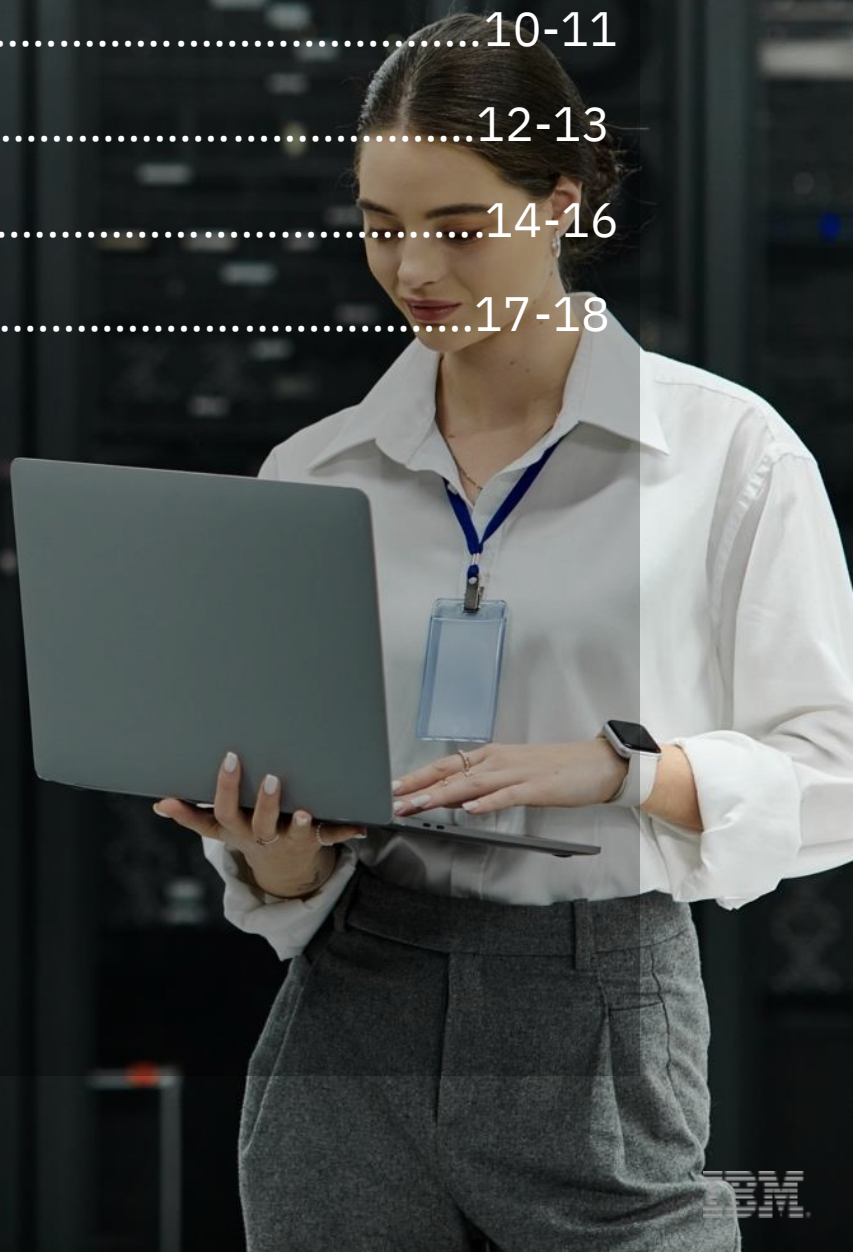
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About IBM

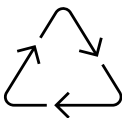
This is IBM in the UK

We have worked together with organisations in the UK for over 100 years, with a rich history of joint innovation and achievements, build on trusted relationships.



Cloud

Together, IBM and Red Hat are working to deliver the worlds only next-generation multcloud platform



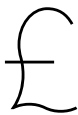
Environment

IBM's focus on sustainability began in 1971 with our first environmental policy.



Graduates

IBM is committed to developing future talent – we are Target Jobs' Graduate Employer of Year 2019



Economy

IBM has been integral to the UK economy for >100 years, and is one of its largest tech employers.



Changing the World

IBM was awarded World Changing Company of the Year 2019 by Fast Company



Volunteering

IBM dedicates >20,000 volunteering hours every year for a better society.



R&D

In the UK alone, IBM invests £170 million in R&D each year.



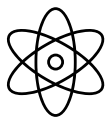
Royal Recognition

29 UK IBMers received honours from the Queen for contributions to tech and society



Tech Talent

IBM runs P-Tech in schools 18 countries, helping >100,000 students build skills for careers of the future.



Quantum

IBM Q, the world's most advanced quantum computing initiative for commercial use is being used by CERN



Diversity

IBM won the Global Diversity Award 2019 and the ENET's Gold Standard.



Inventors

IBM UK is home to many Master Inventors, with >250 patents filled last year alone.

IBM Salesforce Practice

IBM is more than a typical Salesforce partner. Together, we work with our clients to co-create, reimagine and engineer Salesforce across businesses. IBM's leadership in AI and automation, paired with our customer-centric design approach, allows us to deliver breakthrough experiences that transform industries. Our teams of trusted consultants, designers and engineers apply deep industry expertise to change the way work gets done.

Our roots run deep in our ability to translate all your data sources into predictive insights and place them directly inside of Salesforce. We provide access to a library of pre-built applications that enhance native Salesforce functionality and help get solutions to market faster.

For more than 24 years, IBM has been a trusted Salesforce partner. As Salesforce becomes more integral to your daily operations, IBM brings the perfect mix of outcome-driven strategic guidance, human-centred design and technology mastery to get you breakthrough results.

Asset-Based Consulting

IBM has a wide range of Intelligent Assets that uniquely help us deliver Salesforce projects. We have a deep understanding of AI, how to design AI solutions and how to deliver AI effectively.

Delivery Assets

IBM Intelligent Delivery Suite
Salesforce Accelerator Library

Industry Assets

Emergency Preparedness
Investigative Case Management

Platform Assets

SF Einstein1 + Watsonx + SAP
SF Einstein1 + Watson.x + IBM
Mainframe

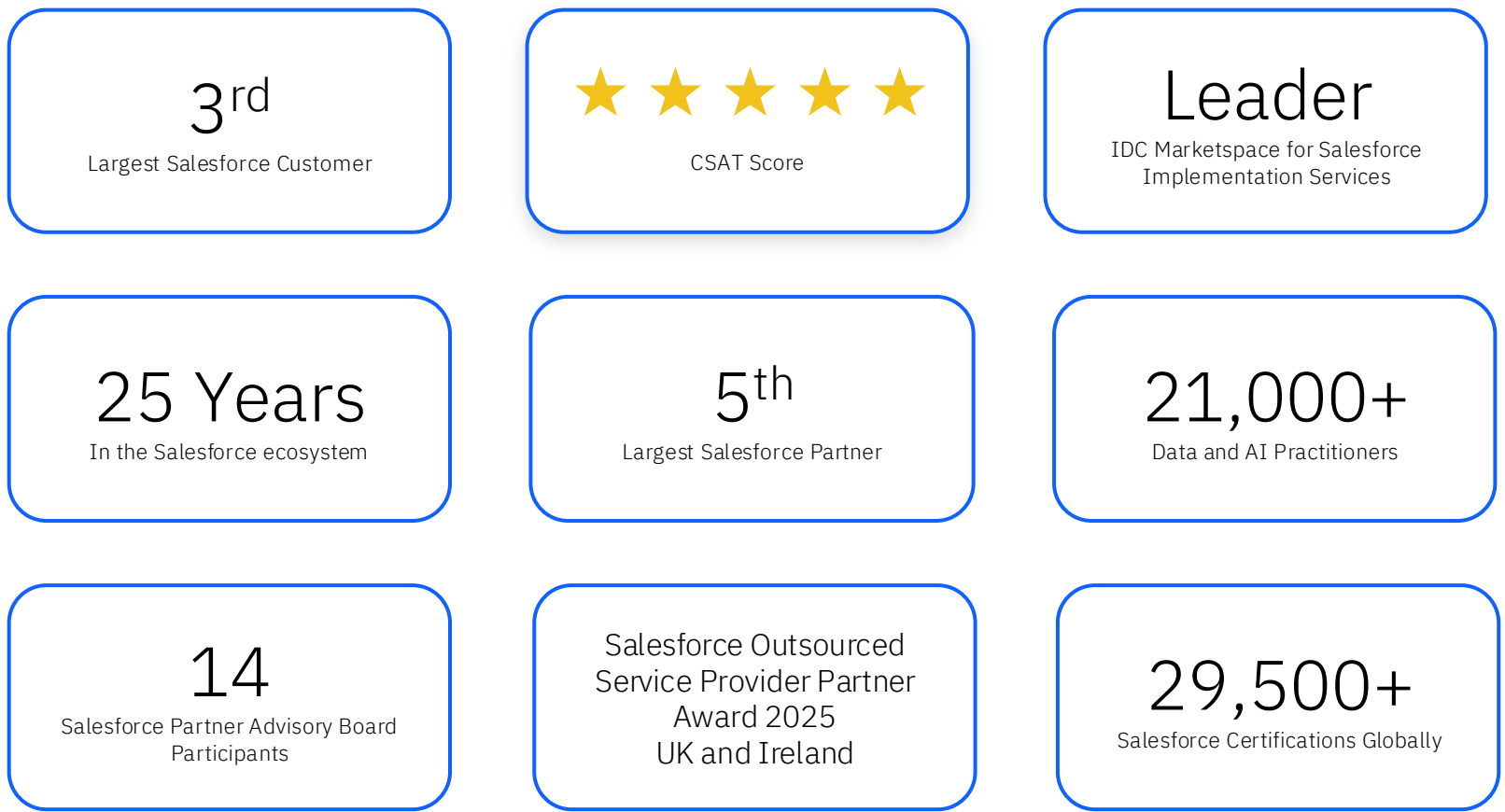
Data Readiness Assets

DTT: Modern Data Accelerators for
Salesforce
DTT: Data Readiness Assessment

IBM is more than a typical Salesforce partner

We bring together consulting excellence, advanced technology, and AI innovation to deliver outcomes that matter. Our AI-first approach ensures that transformation is built for scale, not just pilots. With more than 1,000 enterprise AI engagements and embedded Watsonx-powered assets integrated with Salesforce and SAP, we help clients accelerate time-to-value and achieve measurable results.

Our multi-platform expertise spans Salesforce, SAP, and hybrid cloud environments, supported by a global team of over 30,000 consultants skilled in enterprise integration. We combine this technical depth with industry-specific knowledge to deliver tailored solutions that address regulatory, supply chain, and customer operations challenges. At the core of our differentiation is trust - our legacy of governance and security is reinforced by combining Salesforce’s Einstein Trust Layer with IBM watsonx.governance, ensuring transparency and compliance at every stage.



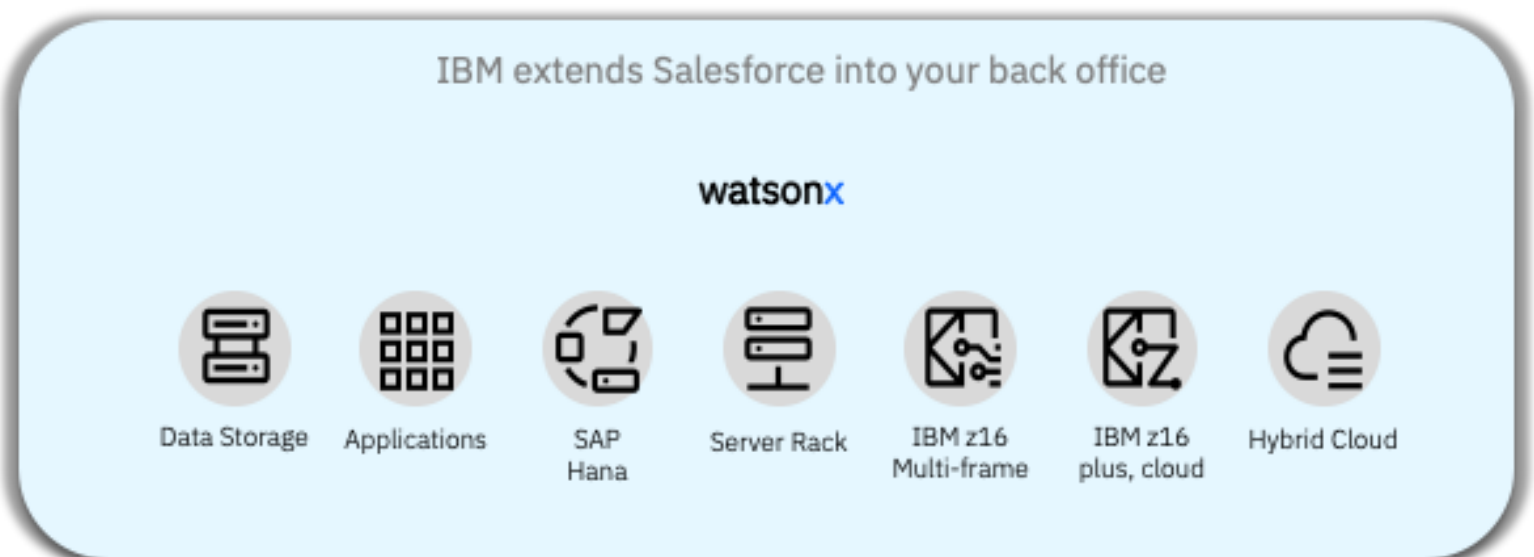
Offerings Overview

IBM's Salesforce Practice provides a comprehensive portfolio of solutions designed to transform customer engagement and modernise enterprise operations. Our offerings infuse AI capabilities across Service, Sales and Marketing, and Industry clouds, which deepens customer engagement and retention through personalised campaigns.

IBM goes beyond being a Salesforce implementation partner - we deliver connected, end-to-end transformation by integrating the front office and back office to unlock the full value of enterprise data. Many organisations struggle with fragmented systems and siloed data, which limits visibility and slows decision-making. IBM solves this by integrating Salesforce with core enterprise platforms—such as ERP, supply chain, and finance systems - creating a single, connected view of the business.

Our approach brings the front office (sales, service, marketing) together with the back office (operations, finance, supply chain) so data flows seamlessly across the organisation. This integration enables real-time insights, automated workflows, and a unified customer experience. For example, sales teams can access accurate inventory and pricing data instantly, while service teams can see order history and delivery status without switching systems.

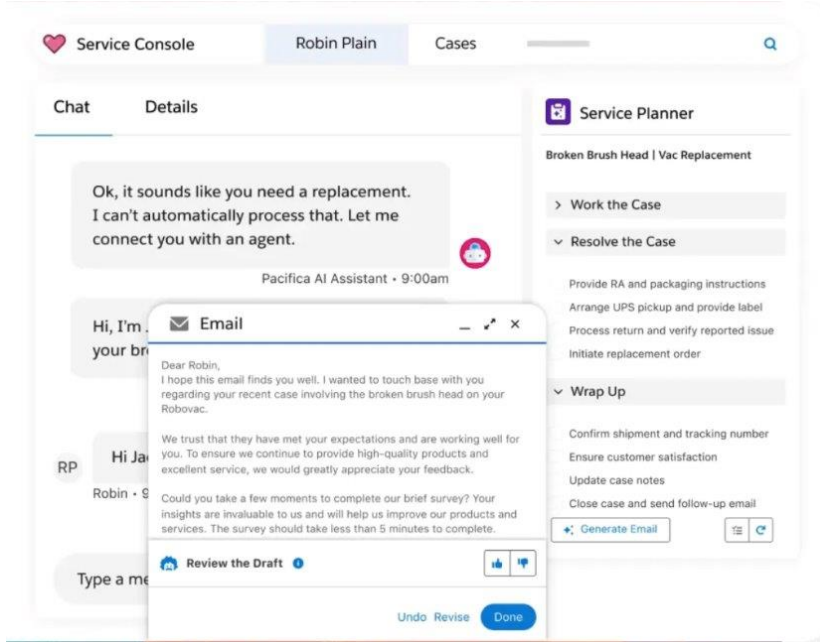
By combining our deep industry expertise with proven integration capabilities across Salesforce, SAP, and hybrid cloud environments, we leverage advanced AI and automation to enhance processes, improve forecasting, and personalise customer interactions at scale. By connecting systems and harmonising data, we help clients unlock hidden value, accelerate time-to-market, and deliver measurable business outcomes.



Service and Sales Transformation

Service Transformation

We use AI-powered tools in Salesforce Service Cloud to change customer service and driving business growth.



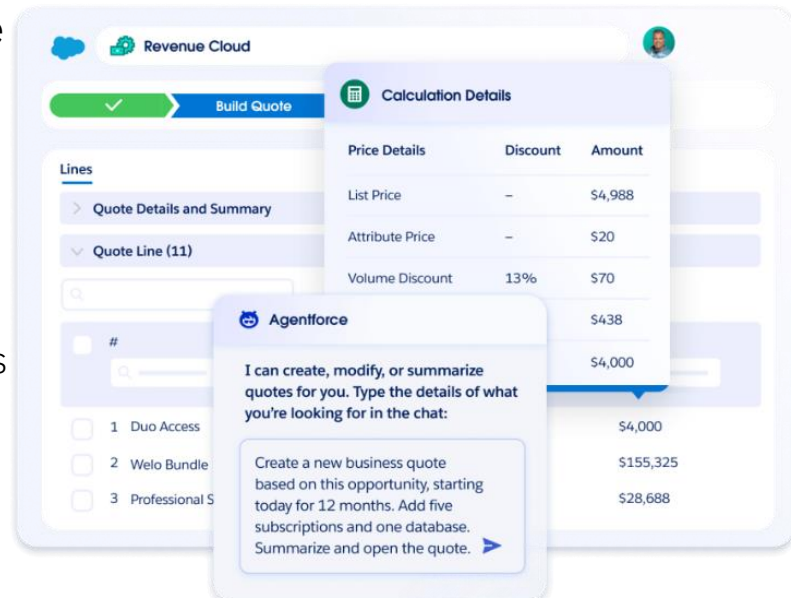
- Einstein for Service – Smart routing, agent assist, and predictive support.
- Agentforce AI Agents – Automate end-to-end workflows and reduce manual effort.
- Omnichannel Engagement – Personalised support across voice, chat, email, and more.

Impact: Organisations modernise service delivery, reduce cost-to-serve, and improve customer satisfaction. AI-powered service operations drive loyalty, retention, and revenue growth while enabling scalable, proactive support.

Sales Transformation

With B2B sales becoming more complex, we help business leaders seeking simpler paths to profitable growth.

- Revenue Cloud Advanced – Streamlines complex pricing & configuration to protect margins.
- Einstein Analytics – Provides predictive insights & accurate forecasting to unlock revenue growth.
- Agentforce – Enhances training, client outreach, and automates routine tasks.



Impact: Empowers sellers to focus on relationships, create customer value, and deliver a seamless, connected buying experience.

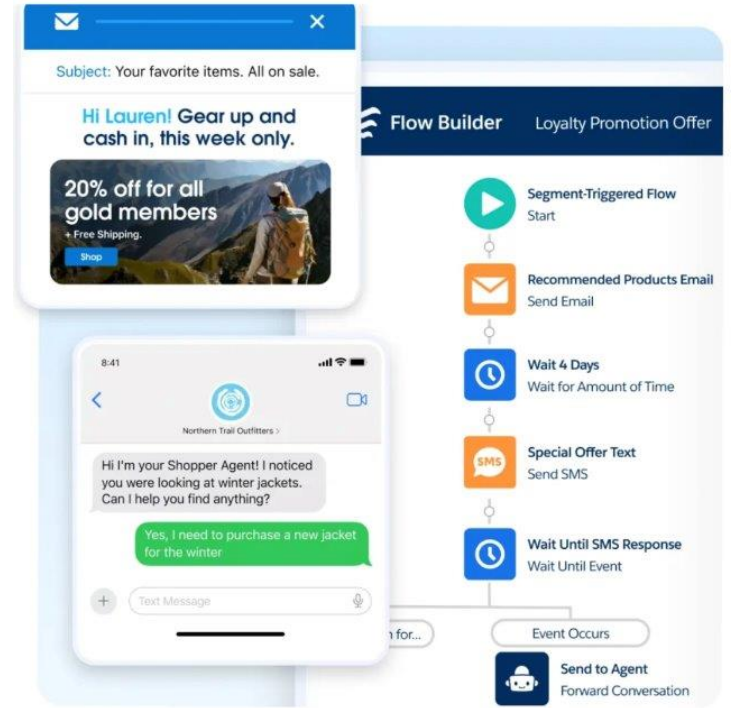
Marketing Transformation and Enterprise Modernisation

Marketing Transformation

IBM enables Salesforce-driven personalised engagement to create richer customer experiences and fuel business growth.

- Marketing Cloud Intelligence – Unifies data across platforms to deliver real-time insights and optimise campaign performance.
- Einstein for Marketing – Powers predictive personalisation and automates customer journeys to increase engagement and conversion.
- Personalisation & Engagement Studio – Enables dynamic content delivery

Impact: Empowers marketers to make smarter decisions, personalise at scale, and deliver seamless, data-driven experiences that drive loyalty and growth.



Enterprise Modernisation

At IBM Consulting, we believe the key to enterprise intelligence is seamlessly connecting front and back offices.

By integrating Salesforce with SAP, mainframe, and AI platforms, we unlock data, automation, and insights that drive agility and growth.

- Unified Integration – Connect Salesforce with core systems for real-time visibility.
- AI-Infused Workflows – Enable predictive, agentic, and automated operations.
- Modern Data Foundation – Activate enterprise data to power Einstein and Agentforce.
- Scalable Innovation – Continuously adapt through intelligent, connected processes.

Impact: Enterprises move from legacy to intelligent operations, achieving faster decisions, lower costs, and measurable business growth.

IBM Application Management for Salesforce

IBM Application Management for Salesforce offers a modern approach to application support. We optimise our service with the latest automation and AI technologies and offer a shared service delivery model that keeps pace with Salesforce's regular updates, all while delivering exceptional service levels.

Features

- Salesforce application design, configuration, and optimisation.
- Managed services support, continuous development + enhancements across cloud platforms
- AI-driven automation for workflows and analytics, as well as integration with DevOps
- Security: Pre-emptive threat detection and compliance reporting.
- Customisable SLAs and performance dashboards.
- 24/7 support for critical issues and disaster recovery.
- Expertise in public sector requirements and BPSS/SC-cleared personnel.
- Impact assessment of SF releases and upgrades, proactive monitoring/incident resolution

Benefits

- Reduce total cost of ownership leveraging our methods, and assets
- Accelerate time-to-value with agile methodologies and DevOps.
- Enhance user adoption and productivity with AI-driven insights.
- Mitigate risks with proactive security and compliance measures.
- Touchless deployments and early releases enabled using IBM DevOps framework
- Improving productivity by 50% for critical system failures through automation
- Outcome-driven consumption model optimising application maintenance spend by 20%
- Effecting up to 60% reduction in risk through Agile-based transition methodology

Key Differentiators

- Deep industry and regulatory expertise to support complex Salesforce environments
- Strong AI support, including Salesforce Agentforce, with capabilities to operationalise, monitor, and optimise AI-driven workflows
- UK-based 24x7 shared service delivery model with scalable, standardised support processes
- Proven strength in integrating Salesforce with large enterprises and legacy systems
- End-to-end support from strategy to run-state, including enhancement, optimisation, and continuous improvement

Data & AI Capabilities

IBM's Data and AI capabilities are designed to help organisations unlock the full potential of their enterprise data and transform business operations through intelligent automation. At the heart of this strategy is Agentforce, Salesforce's agentic AI framework, which IBM extends and enhances with its own technology stack, including watsonx, Granite models, and zero-copy data integration. Together, these capabilities enable businesses to move beyond isolated AI pilots and achieve enterprise-scale reinvention.

What is Agentforce and Why it Matters

Agentforce represents a new era of AI - one where autonomous agents work alongside humans to execute multi-step processes, make decisions, and act across the Salesforce platform. Unlike traditional chatbots or copilots, Agentforce agents are designed to reason, plan, and act, delivering outcomes that scale across the enterprise.

IBM amplifies Agentforce by embedding its own AI technologies and industry expertise, creating bespoke agents that address critical business challenges. These agents are not generic - they are tailored to specific roles and industries, ensuring relevance and impact.

With IBM, Agentforce becomes more than an AI tool. We combine:

- Watsonx-powered AI for advanced reasoning and governance.
- Deep industry knowledge to design agents that understand regulatory and operational complexities.
- Enterprise integration expertise to connect Salesforce with ERP, supply chain, and hybrid cloud systems—so agents can act across the entire business, not just within Salesforce.

This results in autonomous agents that streamline processes, improve decision-making, and deliver personalised experiences at scale, transforming how work gets done.

Data & AI Capabilities

IBM builds custom Agents that address niche use cases in two primary categories.

Industry Agents

Agents for functional roles, clustered by industry

Foundation Agents

Agents for technical excellence across industries

IBM’s Agentforce agents help accelerate delivery

In today’s fast-paced digital landscape, businesses need solutions that deliver speed, efficiency, and innovation without compromising quality. IBM’s Agentforce agents are designed to do exactly that—empowering organisations to accelerate delivery across Salesforce projects and beyond. Below are examples of some of our pre-built agents.

Lead identification

Use available insights and custom data sources to deliver leads in Sales Cloud to other autonomous agents or sales representatives.

Sales training

Use learning journeys, certifications, and personalised support to ramp up new sales programs and help close deals faster.

Banking onboarding

Connect clients and systems to reconcile application data, streamline approvals, and create loyal customers.

Manufacturing modernisation

Integrate Salesforce and enterprise systems fluidly to improve business operations and customer engagement.

Telecom billing

Access and interpret data to reduce the time and manual effort needed to resolve simple and complex billing cases.

Our Delivery

IBM combines strategy, technology, and execution to deliver transformation at scale. Our approach is value-focused, outcome-driven, and designed to minimise risk while maximising impact. We leverage IBM Consulting Advantage, our AI-powered delivery platform, to supercharge productivity and consistency across engagements.

Our Approach

IBM's Salesforce Engagement Method is structured to deliver faster results and sustained value through an iterative, collaborative process:

- **Value Focused:** We define KPIs upfront and track benefits realisation throughout the program, ensuring every step contributes to measurable business outcomes.
- **Faster Time-to-Value:** By delivering minimum viable products (MVPs) early through time-boxed increments, we accelerate adoption and impact.
- **Flexible and End-to-End:** Our methodology spans the entire lifecycle - from vision and design to deployment and continuous optimisation - adaptable to any contract model or program complexity.
- **Lower Delivery Risk:** We employ an architecture-first approach to establish a strong foundation for migration, release, and governance.
- **Scalable Frameworks:** Our process is SAFe-supported and augmented with IBM's Intelligent Salesforce Engagement Method (ISEM) for agility and reuse.

Our Delivery

Our Process

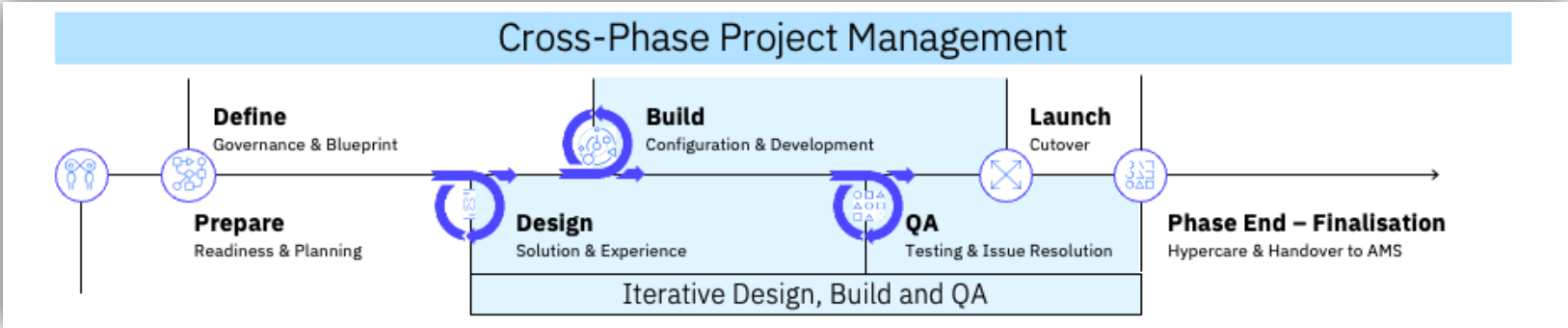
IBM Salesforce Engagement Model (ISEM)

IBM’s delivery approach for Salesforce projects is designed to combine speed, flexibility, and measurable outcomes. The focus is on delivering value quickly by introducing minimum viable products early and tracking success through defined KPIs. This ensures that benefits are realised throughout the project lifecycle.

The methodology is end-to-end, covering everything from initial vision to ongoing value realisation. It’s adaptable to different models and programme complexities, making it suitable for a wide range of business needs. Risk is minimised through an architecture-first strategy, which provides a strong foundation for migration, release, and governance. Scalable frameworks, such as SAFE enhanced by IBM’s ISEM, enable agility and resilience.

Efficiency is achieved through governance and reusable accelerators, which help reduce effort, improve quality, and shorten delivery timelines. The process follows structured phases—Prepare, Define, Design, Build, QA, Launch, and Finalisation—supported by iterative cycles of design, build, and testing. This iterative approach ensures continuous improvement and adaptability throughout the project.

- Value Focused
- Flexible end-to-end approach
- Lower delivery risk
- Re-use and speed



Client Zero

IBM as Client Zero: Leading By Example

IBM’s Client Zero story represents one of the most ambitious enterprise transformations in the industry. As the first organisation to fully reimagine its business using Salesforce and AI at scale, IBM set out to eliminate complexity, simplify workflows, and embed AI into every process. This transformation was not theoretical; it was lived internally, creating a blueprint for clients seeking to achieve similar outcomes.

Over the past five years, IBM consolidated hundreds of siloed systems, unified data across the enterprise, and infused AI into critical workflows. The result: \$400M+ in operational savings, millions of hours of productivity gains, and a 25-point improvement in customer satisfaction.

IBM’s Client Zero journey demonstrates that enterprise-scale AI transformation is achievable and repeatable. By focusing on end-user experience first, IBM proved that revenue growth and operational efficiency follow naturally. This approach is now the foundation of IBM’s consulting engagements, enabling clients to replicate these outcomes across their own organisations.

Two pillars of this transformation - Sales and Service/Support - illustrate how IBM turned challenges into a competitive advantage.

Where we Started

Business Challenges

100s

Siloed systems

6+

Months of training for new hires before independent operations

1.5x

Increase in negative customer satisfaction score

0

Golden copy of customer/client data

Initial Use Cases for Transformation

- Case Summarisation formats varied and were incomplete
- 5+ Hours of repetitive, redundant work for agents weekly
- Limited and confusing self-service experience
- Inability to gather a robust customer problem description
- Lengthy issue triage process with multiple SMEs engaged
- Lack of focus on case management and customer experience
- Limited 24/7 support for non-English speaking clients
- Support professionals “going in blind” based on limited case notes
- No alignment between central and field-based support teams

Client Zero

Service/Support Transformation

Challenge

IBM's support organisation was burdened by 160+ tools, inconsistent case management, and limited self-service options. Our Agents lacked visibility into prior interactions, and clients faced repetitive, frustrating experiences. Training new hires took months, and negative satisfaction scores were rising.

Solution

IBM reimagined support with Salesforce Service Cloud and an AI Everywhere design principle:

- Simplification & Consolidation – Sunset 160+ tools to create a single agent and case management solution.
- AI-Based Routing & Prioritisation – 91% of cases directed to the right expert the first time.
- Digital Self-Service – 70% of support requests resolved through AI-powered channels.
- Slack Case Swarming – Integrated collaboration for faster resolution.
- Applied AI Use Cases – Case summarisation, proactive insights, and multilingual support.

Impact

- 26% improvement in time-to-resolution.
- 25-point increase in Net Promoter Score (NPS).
- 45 minutes saved per agent per day through AI-driven prioritisation.
- \$191M annualised operational savings and \$430M+ influence revenue - double the original business case.

Client Zero

Sales Transformation

Challenge

IBM's sellers, managers, and partners faced a fragmented landscape of over 100 tools, disconnected data sources, and manual processes. Time was wasted navigating internal systems instead of engaging clients. Reporting was inconsistent, and there was no single source of truth.

Solution

IBM consolidated its sales ecosystem into a single Salesforce platform, leveraging 95% out-of-the-box capabilities and embedding AI-first workflows. Key innovations included:

- Unified CRM and Marketing Integration – Salesforce Sales Cloud and Marketo for streamlined engagement.
- AI-Powered Insights – Predictive dashboards and deal rooms delivered via Slack.
- Automation Across Quote-to-Cash – Integrated pricing, contracting, and billing workflows.
- Conversational AI – Chatbots and digital assistants for sellers and partners.

Impact

- 48K+ hours saved by connecting sellers to the right insights and resources.
- 1,000+ buying intent signals surfaced weekly for smarter targeting.
- 30K+ hours saved by accelerating opportunity sharing with partners.
- Improved seller productivity and client engagement, driving incremental revenue and faster deal cycles.



Ireland expedites nationwide COVID vaccination program

The Health Service Executive (HSE) provides public health and social care services to everyone living in Ireland, covering Acute & Community Services nationally and directly employs 80,000 and funds a further 40,000.

HSE chose to build a vaccination platform on Salesforce cloud technology with IBM Consulting. The all-remote team was able to bring in top talent from around the world, who understood the agency's needs. They followed the agile, user-centred IBM Garage Methodology - design, build, scale. The team designed COVAX (COVID Vaccination Information System), a secure and simple-to-navigate vaccine management platform.

Developers built the core COVAX platform on the Salesforce Health Cloud. The system also uses Salesforce Marketing Cloud for communications, Salesforce Experience Cloud for the public portal, Salesforce Lightning Scheduler for appointment scheduling, Salesforce Service Cloud for HSE helpdesk support, and the Salesforce myTrailhead learning platform for employee training and MuleSoft Anypoint Platform for integration with HSE systems, GPs, and Pharmacies. Salesforce Shield provides additional platform security and audit trails.

As of 2025, the COVAX platform is now the strategic National Immunisation Information System (NIIS) for Ireland.

To date the COVAX platform:

- Deployed an MVP in 9 days
- Delivered 51 major releases in 5 years
- Administered 12m vaccines
- Administered 3m boosters
- Trained 4,000 vaccinators & 2,000 operators
- Vaccinated 85% of the Irish population



IBM and Salesforce help break chains of COVID-19 transmission to drive fast-track response to pandemic

IBM led and collaborated in a ‘team of teams’ made up of local authorities and Directors of Public Health, the NHS, Public Health England, public, private and not-for-profit sector partners, and the devolved administrations.

“If you can create that environment where you have got a team working together, with a single purpose and a passion it is truly astounding what you can deliver. We delivered at scale an API/CRM platform on Salesforce with IBM in a matter of weeks which was just incredible. I’ve never seen anything move so quickly!” – Simon Bolton, NHS Digital CEO.

IBM delivered strategic Salesforce and MuleSoft platforms to improve COVID-19 testing and tracking to increase real-time test result throughput and reduced error rates, manage quarantine policies for international travel, improve test result reporting for private labs and point-of-care providers, and enhance traceability and complaint resolution.

The solution:

- Automated and reduced the processing time of up to 2 million test results daily from 8 hours to minutes with zero errors.
- Setup digital capability to manage quarantine compliance and enforcement for over 20 million international arrivals.
- In 4 weeks, vaccination information was matched to 750,000 individuals identified as a contact of a positive COVID-19 citizen
- A single source of truth for information from local governments used to make critical policy decisions reducing preparation time from 24 hours to seconds.

