

Insight Direct (UK) Ltd

Salesforce Professional Services

- Cloud Support - Digital Marketplace - Lot 3
- G-Cloud 15



CONTACT INFO

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Salesforce Professional Services

1. Service Description

1.1. Service Overview

Strategic goals – Unmatched expertise

Salesforce Professional Services contains the world's highest concentration of Salesforce certified experts. This unmatched capability enables truly innovative solutions to be developed for our clients that push the boundaries of what's possible on the Salesforce platform.

Our methodology drives faster implementations, reduced risk of delays and greater value realisation that delivers long term savings for our clients.

Salesforce Professional Services provides a range of offerings to suit different stages of customer adoption :

- Strategy & Roadmap
- Prototype
- Implement
- Run & Innovate
- Expert Services

Strategy & Roadmap:

Establish the right foundation for long-term success with strategic planning.

- What you get: Aligned Vision, Quantified Value Analysis, Change Readiness Plan, Multi-Year Roadmap

Prototype:

Build confidence in Salesforce product capabilities within your environment.

- What you get: Use Case Validation, Investment Modeling, Capabilities Configuration, Design Value Rationalization

Implement:

Deploy the full power of your Salesforce platform across your entire business.

- What you get: Project & Program Architecture, AI-Enabled Delivery, End-User Upskilling, Follow the Sun Development

Run & Innovate:

Drive ongoing transformation to elevate your capabilities and experiences.

- What you get: Operating Model & Governance, Experience Design Capabilities, Change Management Roadmap, Deployment & Release Mgmt

Expert Services:

Engage Salesforce experts to address critical business objectives at any time.

- What you get: Business, Experience Design, Technical, Solution Architects & Developers

1.2. Service Features

- Agentforce CRM
- Agentforce Digital Experiences
- Agentforce Sales
- Agentforce Service
- Data 360
- Agentforce Marketing
- Agentforce Public Sector
- Agentforce Education
- Agentforce Nonprofit
- Agentforce Net Zero
- Agentforce Health
- Agentforce Revenue Management
- Tableau Next
- MuleSoft
- Slack

1.3. Service Benefits

- Driving Strategy with data driven and citizen experience led approach
- Salesforce Experts with access to detailed product roadmap
- Accelerated time to value
- Maximising value from Salesforce investments
- Collaborative working with end users resulting in increased self-sufficiency
- Context-based, accessible user interface design based on user journey
- Use APIs to abstract user interface from the current systems
- Best practice, design, better insights, templates, requirements documents
- Develop core application in the form of Digital services
- Add additional capabilities through a range of third parties
- Quickly reach a minimum viable product
- Agile iterative development providing incremental functionality

1.4. Main components & Functions of this service

Salesforce professional services implement Salesforce cloud-based services. Please see the document associated with these services which describe their capability.

2. Information Assurance

Full details are contained in our terms.

3. Data Backup / Restore and Disaster Recovery

This service relates to the provision of Professional Services and therefore this section is not relevant.

4. On-Boarding

Customer's requirements will be agreed and detailed in the call-off contract; in tandem, we will agree the best approach to commencing our engagement.

4.1. Deployment

Salesforce is a cloud-based application which means the technical deployments do not require any hardware or software to be installed. The only requirement from a customer organisation is a browser with sufficient power and appropriate internet access.

Customers will also need to consider the usual change management aspects of the project including training and process changes. Salesforce can also help with these aspects.

4.2. Configuration and Customisation

The vast majority of the work we perform is customisation on the Salesforce platform. If required for niche requirements or technical reasons we may need some coding on the platform. With each engagement, we agree on a plan of how we will handover the ongoing maintenance of the application to appropriately trained members of staff within the customer's organisation if they wish.

5. Off-Boarding

We will deliver all services to the customer and ensure their agreement that their expectations have been met, we will endeavour to provide knowledge transfer to enable the customer to gain maximum value from the engagement.

5.1. Termination

Please see standard terms within the call off agreement.

5.2. Data Extraction and removal

As this service relates to Professional Services, data extraction and removal does not apply.

6. Pricing Summary

The majority of our resources are priced on an hourly basis with our longer-term advisory roles being priced in a number of months. Comprehensive pricing details can be found in our separate pricing document.

7. Service Constraints

Professional Services will be provided in accordance with the call-off contract as agreed.

8. Service Management

Our staff hold various service related certifications including:

- TOGAF
- Scrum Master
- Salesforce product certifications
- PMP certifications.

9. Customer Responsibilities

Here are some key responsibilities we wish to highlight; a full list is contained in our terms.

Management

Using our online tools, you will need to manage your usage of and access to the service, for example, user accounts, installed applications, sites etc.

Compliance

In using the service, you need to ensure your compliance with our terms, which include:

- Being responsible for the accuracy, quality and legality of your data and the means by which you acquired your data.
- Using commercially reasonable efforts to prevent unauthorised access to or use of the service, and notify us promptly of any such unauthorised access or use.

Usage Restrictions & Information Security

You must:

- Ensure that only information of an appropriate security classification is placed into the service.

You must not:

- Use the service to store or transmit infringing, libellous, or otherwise unlawful or tortious material, or to store or transmit material in violation of third-party privacy rights.
- Use the service to store or transmit malicious code.
- Interfere with or disrupt the integrity or performance of any service or third-party data contained therein.
- Attempt to gain unauthorised access to any service or content or its related systems or networks.
- Permit direct or indirect access to or use of any service or content in a way that circumvents a contractual usage limit.

10. Client-side Technical Requirements

Professional Services may have on-site requirements to facilitate the work with which they are engaged, such requirements can be the provision of internet access etc. further details can be agreed prior to procurement.

11. Planned Maintenance Windows

This service relates to the provision of Professional Services and therefore this section is not relevant.

12. Training

Salesforce provides a range of standard classroom training and custom training based on the rate cards provided.

13. Data Centre Locations

This service relates to the provision of Professional Services and therefore this section is not relevant.

14. Performance

Commitments to performance during provision of professional services are stated within the terms of the call of contract.

14.1. Service Levels

This service relates to the provision of Professional Services and therefore this section is not relevant.

14.2. Incident Response Time

This service relates to the provision of Professional Services and therefore this section is not relevant.

14.3. Incident Updates

This service relates to the provision of Professional Services and therefore this section is not relevant.

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