

Insight Direct (UK) Ltd

Salesforce Lightning Agentforce Marketing (formerly Salesforce Lightning Marketing Cloud)

- Cloud Software - Digital Marketplace - Lot 2b
- G-Cloud 15



CONTACT INFO

pstenderteam@insight.com

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Salesforce Lightning Agentforce Marketing

1. Service Description

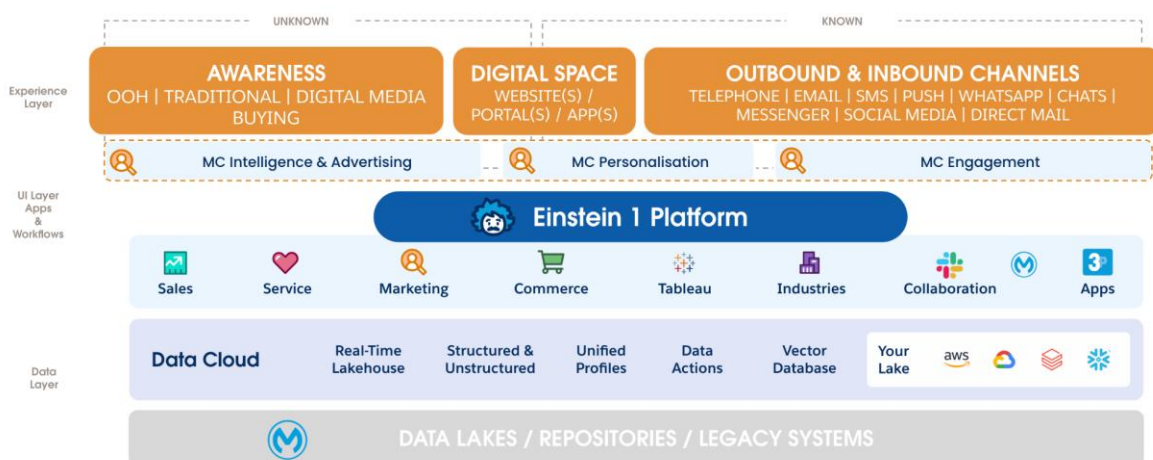
1.1 Service Overview

Salesforce Lightning Marketing Cloud [Former name] is now [Lightning Agentforce Marketing]. You may continue to see the former name in our application and documentation. Communication is the cornerstone of trust. For public services, delivering consistent, informative, and timely communication is crucial. Without it, citizen concern escalates, driving a need for reassurance. By embracing proactive communication strategies, organisations can enhance service delivery, reduce costs, and improve both citizen satisfaction and staff morale.

The Salesforce Marketing Cloud stands at the forefront of Digital Communication Platforms, seamlessly integrating with your existing infrastructure to expedite impact and ROI. Our commitment to net-zero ensures that all communications facilitated by Salesforce are carbon-neutral, aiding in the reduction of your scope 2 emissions.

Salesforce Data Cloud provides one continuous record and platform to power your entire ecosystem and modernise experiences.

Powering Modern Citizen Experiences



Drawing from our extensive experience within the UK Public Sector and beyond, we've identified **six** key value drivers:

- Enhanced Citizen Experience:** Utilising Marketing Cloud technologies allows organisations to harness real-time data for personalising digital interactions. Proactive communications and precisely targeted content provide reassurance and vital information to citizens. Features like bi-directional SMS and live email empower citizens to share updates without resorting to phone calls.

2. **Operational Cost Reduction:** Proactive communication strategies have been proven to decrease inbound queries, boosting staff efficiency and citizen satisfaction. Translation services automatically adapt to the required language, enhancing accessibility. Media buying integration and native connection to Case Management streamline processes, augmenting internal efficiencies and improving ROI.
3. **A Platform for Innovation:** The synergy of Data Cloud and Marketing Cloud lays a foundation for continual innovation. Adopting an 'integrate once, iterate forever' approach, organisations can activate consolidated data for myriad purposes, enabling rapid adaptation to changing citizen needs.
4. **Self-Serve or as a Service:** Designed to amplify user capabilities, Marketing Cloud can also be delivered as a service through our extensive partner network, offering tailored solutions for every need or as part of a wider outsourced strategy.
5. **Connected Analytics:** The proliferation of unstructured meta-data and analytics breeds data silos. Marketing Cloud Intelligence collates all interaction data into live dashboards for comprehensive reporting and insights. Integration with Tableau further enhances self-service analytics capabilities, providing a window into endless insights.
6. **Data + AI:** The key to unlocking the potential of Artificial Intelligence lies in effectively leveraging data. Salesforce Data Cloud acts as a catalyst for organisational transformation. Marketing GPT, embedded within our solutions, automates segmentation and content creation through natural language processing, while Einstein unveils hidden insights, ensuring that every decision is informed and impactful.

1.2 Service Features

1. Single customer record by unifying and harmonising disparate data sources to power all engagement.
2. Omni-channel communications: email, 2-way SMS, 2-way whatsapp, push notifications, advertising & direct mail integration.
3. Drag & drop and Gen-AI content creation natively within the application.
4. Build and host landing pages and microsites simply and safely within the application.
5. Native integrations with Service & Sales Cloud for cross-cloud journeys
6. Real-time personalisation of web and mobile applications. Live engagement feed of interactions
7. Drag & Drop or natural language segmentation tools.
8. No-code & Low-code declarative configuration, Open API integration, Training included.
9. Improve media buying & targeting through data-driven retargeting, lookalikes and suppressions to advertising channels.
10. Centralise all of your analytics from engagement, media buyer to web analytics into a single intelligence tool, with integration to Tableau for self-service intelligence.

1.3 Service Benefits

1. **Proactive Citizen Engagement:** Data-driven, boosting satisfaction, enhancing trust, reducing queries.

2. **Unified Customer View:** Integrates all data sources for a unified citizen profile.
3. **Real-Time Personalisation:** Instantly adapts interactions across all digital channels.
4. **Analytics Across Channels:** Measures media and campaign effectiveness accurately in one view.
5. **Cost-Effective Communication:** Optimise channel use, lowering service costs.
6. **Data Governance Enhanced:** Improved data handling with unified citizen records.
7. **Operational Efficiency:** Reduces costs by minimising need for citizen inquiries.
8. **Unparalleled Scale:** Delivering billions of engagements, personalisation and AI decisions daily across the globe.
9. **Engagement Transparency:** Builds trust with clear data usage, consent, and CSAT measurement.
10. **Cross-Cloud Journeys:** Streamline case management and internal efficiencies through OTS Salesforce integration.

The Salesforce Marketing Cloud suite comprises four distinct yet fully integrated tools, all seamlessly connected with our Data Cloud Platform, empowering organisations to optimise their digital engagement strategies and modernise citizen experiences.

1. **MC Engagement:** Recognised as the world's premier digital communication platform, MC Engagement facilitates omni-channel communications and journeys at an unparalleled scale. It is the driving force behind proactive communication strategies across various UK Government organisations, enhancing citizen engagement and operational efficiencies.

Benefits:

- Omni-channel journey orchestration
- Scalable communication strategies
- Enhanced citizen engagement

2. **MC Advertising:** Built as an extension of MC Engagement, MC Advertising harnesses the power of marketing and engagement data to refine media buying strategies. It not only complements existing media strategies but also boosts reach and awareness, ensuring that your advertising spend is as efficient as possible.

Benefits:

- Optimised media buying
- Increased campaign reach and awareness
- Integration with existing strategies

3. **MC Personalisation:** MC Personalisation taps into the power of real-time data to tailor experiences across websites, portals, and mobile applications. It dynamically adjusts content, offers, and language to meet citizen needs precisely, enhancing the user experience and engagement.

Benefits:

- Real-time content personalisation
- Enhanced user experience on digital platforms
- Dynamic content adjustment based on user interactions

4. **MC Intelligence:** A favourite among leading media planning and buying agencies, including OmniGov, MC Intelligence consolidates analytics and data from a vast array of

sources. This tool provides invaluable insights into the effectiveness of your strategies, helping you understand campaign impact, sentiment, and satisfaction rates.

Benefits:

- Comprehensive analytics and data consolidation
- Insightful campaign effectiveness measurement
- Integration with Tableau for advanced analytics

5. **Data Cloud:** Data Cloud offers the capability to integrate and unify diverse data sources, enabling the activation of this data in real-time. This platform supports a bring-your-own-lake approach with cloud partners like Snowflake, AWS, Databricks, and Google, ensuring data security and accessibility with zero-ETL where required.

Benefits:

- Unified citizen view through data integration
- Open and extensible to all major technologies
- Real-time data activation across Salesforce Clouds

Together, these tools form a robust ecosystem that empowers organisations to engage citizens more effectively, personalise experiences, optimise media strategies, and leverage data insights to drive decisions, setting a new standard for digital engagement in the public sector.

2. Information Assurance

Salesforce Engagement Cloud's formally documented Security Program and associated controls are aligned with the ISO 27001 standards. That program includes a dedicated Trust (Security) team responsible for the security program.

Salesforce Engagement Cloud maintains many formal and internationally recognised certifications and auditing standards. These may vary slightly between service offerings within the Engagement Cloud and are documented within each service offering's Security, Privacy and Architecture Documentation, which are available publicly online:

https://help.salesforce.com/HTViewSolution?id=000181590&language=en_US

Our certifications include:

- **ISO 27001/27017/27018 certification:** Salesforce operates an information security management system (ISMS) in accordance with the ISO 27001 international standard and aligned to ISO27017 and ISO 27018. Salesforce has achieved ISO 27001/27017/27018 certification for its ISMS from an independent third party.
- **UK Cyber Essentials:** The UK Cyber Essentials Scheme is backed by UK industry, including the Federation of Small Businesses, the CBI and a number of insurance organisations offering incentives for businesses. UK Cyber Essentials is a legal entity-based program and it applies to salesforce.com EMEA Ltd.
- **Service Organisation Control (SOC) reports:** Salesforce's information security control environment undergoes an independent evaluation in the form of a SOC 2 report.
- **TRUSTe Privacy Seal:** Salesforce has been awarded the TRUSTe Privacy Seal signifying that the our Web Site Privacy Statement and associated practices have been reviewed by TRUSTe for compliance with TRUSTe's program requirements,

including transparency, accountability, and choice regarding the collection and use of personal data.

Relating to the Government Security Classification (GSC) scheme, Salesforce has various Public Sector customers, holding a variety of data, which is constantly increasing. Please contact us for up-to-date information relating to specific requirements.

3. Data Backup / Restore and Disaster Recovery

All networking components, SSL accelerators, load balancers, web servers and application servers are configured in a redundant configuration. All customer data is stored on a primary database server with multiple active clusters for higher availability. All customer data is stored on carrier-class disk storage using redundant disks and multiple data paths to ensure reliability and performance.

Salesforce has disaster recovery plans in place and tests them at least once per year. We utilise secondary facilities that are geographically remote from their primary data centres, along with required hardware, software, and internet connectivity, in the event Salesforce production facilities at the primary data centres were to be rendered unavailable.

4. On-Boarding

4.1 Deployment

Salesforce Engagement Cloud Implementation services provide a comprehensive, highly controlled and repeatable plan to get you up and running with your new solution, giving you flexibility and control over every step of the onboarding process. Engagement Cloud customers have two onboarding options to consider:

- **Self-Service Onboarding.** The first option is provided to every customer without a Services engagement, and provides access to all of the resources housed in Salesforce Help. Customers also have unlimited access to our Marketing Success Community.
- **Comprehensive Onboarding.** The second option is to leverage Engagement Cloud Services for comprehensive, project-based onboarding services.

Implementation services have helped many of our customers get off to the right start and gain momentum quickly, decreasing their time-to-value.

4.2 Configuration and Customisation

The service provides many configuration options, including integration with custom applications. Details can be found here: <http://www.salesforce.com/uk/marketing-cloud/overview/>

5. Off-Boarding

Off-boarding from the service is as simple as exporting and downloading your data if you choose to do so. We provide your data in an industry standard readable format to make it as easy as possible for you to migrate to another service if you wish to do so.

5.1 Termination

Details of termination options and implications are contained in our terms.

5.2 Data Extraction and removal

Data deletion and return is addressed within the Security Privacy and Architecture (SPARC) documentation for any given service. The SPARC documentation is available online at: https://help.salesforce.com/HTViewSolution?id=000181590&language=en_US

The Engagement Cloud would not itself delete client data through the course of the client relationship. Upon termination of the relationship, the client account is marked as inactive, and the client has a grace period where they may be able to download any data not already removed from the system. Ninety (90) days after the account is marked as inactive the Engagement Cloud will remove the client data from its production systems. (Data may continue to exist within encrypted backup media for up to 24 weeks).

6. Pricing Summary

Comprehensive pricing details can be found in our separate pricing document.

The service has various pricing levels and bandings based on type of service required and the volume needed. Please refer to pricing documents for detailed pricing.

7. Service Constraints

Here are some key considerations we wish to highlight; a full list is contained in our Supplier Terms.

Usage Limits

- Services and content are subject to usage limits, including, for example, the quantities specified in order forms.
- A user's password may not be shared with any other individual.

If you exceed a contractual usage limit, we may work with you to seek a reduction in your usage so that it conforms to that limit. If, notwithstanding our efforts, you are unable or unwilling to abide by a contractual usage limit, you will execute an order form for additional quantities of the applicable services or content promptly upon our request.

Customisation and configuration of the service is independent of the underlying infrastructure; upgrades do not impact any changes you may have made. As a result of this independence it is typical for customers to customise their service to their own requirements. As the service is SaaS based, Salesforce is aware of which users are using which features etc., therefore we are aware of any potential impact a feature deprecation would have on customers and can work with them should there be a need for a feature deprecation.

8. Service Management

Your success is our success

Customer success is a top priority for Salesforce. Every customer gets a Standard Success Plan for online support and training. Our most successful customers take advantage of our

Premier Success Plans to achieve an 80% higher return on their Salesforce investment. Large enterprise customers can benefit from Signature Success, our highest level of service to support their most critical business demands.

Premier and Signature Success packages can be purchased through G-Cloud specialist cloud services.

Standard Success

Every Salesforce customer gets a Standard Success Plan for online support and training. Our Standard Success Plan, included with each licence, provides:

- Success Communities to share with other customers
- Guided Journeys on how to use Salesforce
- Circles of Success Interactive Events
- 12/5/365 online case submission
- Response in two business days
- Trailhead online training
- “Getting Started” online training catalogue

Standard Success is for companies that need standard guidance in getting started with Salesforce. If you need a faster response, 24x7 support coverage, and/or a comprehensive training solution, we recommend our Premier Success Plans.

Premier Success

Our most successful customers take advantage of Premier Success to achieve an 80% higher return on their Salesforce investment.

The Premier Success Plan provides specialised guidance whether you have how-to questions, experience technical issues, need troubleshooting, or want to increase the value you get from Salesforce.

Benefits include:

- 24/7 online and phone support by senior support analysts
- Expert coaching sessions
- Reviews of your platform health and business value
- Developer support
- Expert Assistance

Specialised Guidance

- A discount on all Trailhead Academy courses and certifications
- Quicker response times than Standard Success. When critical issues arise, our skilled support engineers respond within one hour.

Expert Assistance

Expert coaching sessions are specialised engagements designed to help you get more value from Salesforce products. With Premier Success, you can attend webinars on a specific topic and watch coaching videos and then have an individual follow-up session to dive deeper.

We also offer personalised sessions with Salesforce experts to help you overcome obstacles and drive long-term success. More than 200 options cover a range of needs and interests across Salesforce products.

To get real-time answers to your questions, Premier Success includes live Q&A sessions with Salesforce experts, addressing topics from adoption and how-tos to best practices. Specialised technical support is also available for admins and developers to troubleshoot custom code issues.

Specialised Guidance

To help ensure that you see continuing success with Salesforce, Premier Success includes personalised guidance and insights. Through periodic reviews and check-ins, we evaluate your platform health and value maturity. These technical and business reviews assess key areas of platform performance, prioritise areas for growth, and set and track progress against your targets with quantifiable success metrics.

Signature Success

Extend your team with Signature Success. Rest assured knowing our certified experts are here to help you maintain your Salesforce solution.

Signature Success is the highest level of support from Salesforce and provides a high-touch experience led by a named expert who acts as an extension of your team. Customers with Signature Success benefit from increased performance and productivity through all the features of Premier Success plus:

- 15 minutes initial response for critical issues.
- The fastest response times from our most skilled support engineers.
- A designated Technical Account Manager.
- Customer Success Score for actionable insights and recommendations.
- Technical Health Reviews.
- Proactive Monitoring and Key Event Management.

Technical Account Manager (TAM)

Account management by a named champion. An assigned TAM provides consistent advocacy and guidance with a deep understanding of your business. These highly experienced technical experts provide support case oversight and escalation, weekly meetings, and tailored solution guidance.

Proactive services

Signature Success includes 24/7 monitoring that is tailored to your configuration. Your TAM coordinates with Proactive Services Engineers experts and helps ensure you prevent or mitigate potential issues identified, before they can create business disruption. If anything does go wrong, you can expect early alerts, remediation, and reviews to eliminate recurring root cause patterns.

Available at all times and offers the fastest case response times, including 15 minutes for severity 1 issues via phone or chat through our Help site.

Accelerators

Accelerators are quick, personalised work sessions that solve specific Salesforce challenges. The list of accelerators available varies depending on the type of plan you chose; there are no accelerators available with the standard plan. A customer can have unlimited accelerators as long as only one is being delivered at a time.

Learn more: <https://www.salesforce.com/services/success-plans/overview/>

There is no financial recompense model for not meeting service levels.

9. Customer Responsibilities

Full details are contained in our terms.

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.

10. Client-side Technical Requirements

Salesforce is a SaaS (Software as a Service) solution and users access the tools via a web browser. Therefore, no hardware or software installation is necessary.

Marketing Cloud supports the current versions of major browsers, including:

- Internet Explorer
- Firefox
- Chrome

The timeline for the adoption of new browsers varies; however, browser testing is included as part of our standard release cycle. Our graded browser support allows you to clearly know what browser versions have been tested and approved.

Marketing Cloud also offers a mobile application for iOS and Android. Our Social Studio mobile app is also available for iOS and Android.

11. Planned Maintenance Windows

When maintenance is scheduled, Salesforce publishes the dates and times of the maintenance windows on trust.salesforce.com. Premier Alerts are sent via email when the maintenance windows are posted to trust.salesforce.com. In the event of planned maintenance that requires customer action in advance, such as updating network settings in preparation for additional login pools, Salesforce endeavours to communicate via email to system administrators of your organisation months prior to the maintenance. If emergency system maintenance is required, customers may be notified less than one week in advance.

There are two types of maintenance at Salesforce:

- System maintenance is for sustaining the security, availability, and performance of the infrastructure supporting Salesforce services.
- Release maintenance is for upgrading Salesforce services to the latest product version to deliver enhanced features and functionality. There are three different kinds of release maintenance: major releases, patch releases, and emergency releases.

Major release maintenance dates and times are posted on approximately one year before the release date. Major release maintenance occurs three times per year.

Patch releases and emergency releases are used to deliver scheduled and ad hoc application fixes and are typically seamless to customers. Whenever possible, patches and emergency releases are deployed during off-peak hours and without downtime. You can see our preferred maintenance schedule at https://help.salesforce.com/apex/HTViewSolution?id=000176208&language=en_US or learn more at <http://trust.salesforce.com>

12. Training

Salesforce offers many ways for you to learn the skills you need to succeed with our technology, earn credentials that grow your career, and connect with our global community of Trailblazers to continue learning together. We provide a variety of online resources for initial training and ongoing learning, including getting started guides, interactive learning paths, help and technical documentation, and videos. You also have options to engage with our team and other users through our online community and virtual and in-person events. We offer the following options for users to learn in the way they want:

Learn online. Learn at your own pace with guided paths designed so each user can create a personal learning experience. You can collect badges along the way and use the skills you gain to earn Salesforce certifications.

Learn in class. Salesforce offers live training classes and workshops so users can learn directly from our experts. We provide options for in-person and virtual classes that cover every Salesforce product and role so you can dive deep into relevant skills and knowledge.

Learn from each other. Through the Salesforce Trailblazer Community, you can connect with other users to get answers and tips, share ideas to make our products better, and join user groups that match your experience and interests.

To support these training options, we provide a variety of additional resources, including tools, forums, webinars, videos, blogs, and more. Salesforce makes it easy for you to access the information you need to blaze your own trail to success.

1. Learning Trails

Trailhead is a free, online, interactive learning platform that makes it fun to learn Salesforce skills. You can access guided, self-paced learning paths, called trails, that cover individual topics on all Salesforce products. We provide trails by product, user role and skill level, and topic so you can easily find learning content that is tailored to you.

As you learn, you can test your knowledge through quizzes and hands-on exercises. You earn points and badges as you learn the skills you need to get the most out of the Salesforce platform.

2. In-Person and Virtual Classes

Salesforce provides flexible options for in-depth training from our experts in classrooms or virtual settings. You receive hands-on guidance, learn skills through a training playground environment, and can build relationships with others in your class. Classes are available for all Salesforce products and skill levels.

Expert-led courses are available for a specific cost. You can review available classes and register on our website.

3. Class Content

Marketing Cloud classes provide hands-on training of the essential skills needed to use various components of the Marketing Cloud application. Our instructors provide best practices and helpful tips to help you grow as a digital marketer. With a participant study guide, detailed learning modules and topics, and in-application exercises, we help you learn key course components.

After completing a course, you have the option to take a certification exam for an additional cost. The certification is designed to ensure you understand key concepts and can demonstrate your expertise.

4. Earn Certifications

Trailhead enables you to earn skill-based credentials and certifications to demonstrate your knowledge. You can earn skill-based Salesforce credentials called superbadges to show that you can apply what you have learned to solve complex real-world challenges.

You can also earn Salesforce certifications to prove your skills and grow your resume. Available Marketing Cloud certifications include:

- Salesforce Certified Marketing Cloud Consultant
- Salesforce Certified Marketing Cloud Email Specialist

These credentials test your proficiency in Marketing Cloud capabilities and your knowledge of marketing best practices. You can maintain your certifications by completing maintenance exams directly in Trailhead.

13. Data Centre Locations

Marketing Cloud operates within EEA geographies with Data Centres located in:

- Frankfurt, Germany
- Paris, France
- Amsterdam, Netherlands

Our Predictive Recommendations data is housed in Amazon Web Services' global data centres. Additionally, data maintained through Social Studio is housed in two co-located data centres in Canada (Saint John, New Brunswick and Halifax, Nova Scotia).

Our data centres have access control systems that permit only authorised personnel with access to secure areas. These facilities are:

- Designed to withstand adverse weather and other reasonably predictable natural conditions
- Secured by around-the-clock guards, two-factor card key, and biometric access screening
- Supported by on-site back-up generators in the event of a power failure

14. Performance

Full details are contained in our terms.

15.1 Service Levels

Salesforce Engagement Cloud averages industry-leading uptime consistently. A team of 24 people staff our Global Product Operations Department, which monitors the software around-the-clock to ensure top performance. All maintenance is done behind the scenes, so our software-as-a-service application is still available for use while maintenance is taking place.

A Service Level Agreement used commonly in on-premise software deployments. SLAs are not a strong benchmark for cloud computing deployments so not something that we would commonly put into a contract, in line with other Software-as-a-Service cloud organisations.

Salesforce however, unlike many companies, is transparent about how well the services are performing. At any time you can see the recent availability of our services and the effective SLA we are running to. For core services the information can be found at <http://trust.salesforce.com>; for Engagement Cloud at <https://trust.marketingcloud.com>

By checking this site a customer can see where we have had issues and more importantly can see the history of how quickly we responded to any issues. Our track record should provide the comfort a decision maker needs to feel satisfied that availability is our top priority.

In exceptional circumstances we can offer an SLA which will be based upon an agreed level of uptime which would be associated to service credits

15.2 Incident Response Time

Standard Success customers receive a response from Global Support within two business days. Shorter response times are available up to two hours with paid support tiers. Response Level Commitments are available upon request with paid support tiers. Salesforce does not guarantee resolution times, only response standards.

Case escalation is executed based on the impact and urgency of the issue, and case progressions are based on the support entitlement level as well as the severity of the issue.

15.3 Incident Updates

Incident update intervals vary based on the level of support selected, ranging from every 30 minutes to longer periods.

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