

Insight Direct (UK) Ltd

Salesforce Success Plan

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



CONTACT INFO

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Salesforce Success Plan

1. Service Description

1.1. Service Overview

Your success is our success

Every customer gets a Standard Success Plan for online support and training. Our most successful customers take advantage of our Premier Success Plan to achieve an 80% higher return on their Salesforce investment. Signature Success delivers our highest level of proactive support and guidance, to support critical use cases and maximise value from your Salesforce investment.

The Success support services can be paired with many of Salesforce's services.

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

1.2. Service Features

- 24/7/365 Sales, Service, Marketing, Community, Heroku, Analytics, Commerce, Data Cloud, App Cloud support
- Online case submission with enhanced support offerings
- Online Salesforce Success Community for knowledge articles and best practice
- Access to our "Getting Started" online course catalogue
- Access to free online training packages and webinars
- Enhanced online training and templates capabilities
- Enhanced Expert Coaching Sessions to enhance time to value
- Enhanced support offerings including Health Checks and Maturity Assessments
- Enhanced Salesforce Developer Support
- Proactive monitoring of your Salesforce instance

1.3. Service Benefits

- Direct access to Salesforce technical expertise
- Maximise ROI through a quicker resolution of support cases
- Faster development - minimise time to value
- More analytics and insight
- Minimise deployment and adoption risk by understanding best practices
- Minimise the risk of sub-optimal development and technical debt
- Ensure business continuity
- Drive user adoption
- Increased business productivity
- Increased Salesforce knowledge of Users, Administrators and Developers

1.4. Main components & Functions of this service

Success Plans provide guidance, support, and training to help you get the most out of Salesforce. No matter what you want to achieve, there's a Success Plan that's perfect for you.

Signature Success Plan

Includes all the Premier features. In addition, Signature delivers our most proactive, personalised support and expert guidance to maximise the value from your Salesforce investment.

Proactive monitoring: prevent potential risks with 24/7 Proactive Monitoring, including alerts on performance, errors, and limits.

Customer Success Manager (CSM) is a designated Salesforce expert, partnering with you to drive adoption and value realisation. They orchestrate the Signature services, to provide the right Signature services and resources at the right time.

Fastest Case Response Times Sev1: 15 mins response and updates every 30 mins, Sev2: 1 hour with direct access to expert support engineers who are R&D trained with industry specialisations and a dedicated emergency hotline

Annual Technical Health Reviews and Architecture Guidance provide a holistic review of the solution, performance and scalability.

Key Event Management, Technical Release Planning and Deployment Support

Plan, monitor and go-live support to de-risk your key releases and peak events.

Instructor-led Training

Learn directly from Salesforce experts with live, instructor-led training. Discover how to set up key Salesforce features in just 60 to 90 minutes with workshops. Deep dive into Salesforce products with free multi-day immersive courses.

Standard Success Plan

Standard Success Plan is a good fit for those who prefer a self-guided experience. You'll get guidance from the Salesforce community, online support for technical challenges, and access to fun online learning resources.

Guidance

Take advantage of free resources to find answers to your questions.

Guided Journeys - Choose a self-guided learning path based on your role. You get step-by-step instructions to help you get started, solve problems, or achieve a business outcome.

Success Communities - Engage a passionate community of Salesforce customers and experts. Ask and answer questions. Find and follow interesting people, or join groups for extended discussions.

Circles of Success - These interactive group discussions offer an open forum to learn best practices or actively troubleshoot situations with peers.

Webinars and Videos - Every week there are new webinars on Salesforce fundamentals and best practices. Sign up in advance, or watch one of our many videos on demand.

Support

Get the help you can count on. When you need assistance, open a case through the Help & Training website. You also get access to knowledge articles to help solve most support issues.

Training

For Salesforce admins, developers, and users who want to go further, Trailhead is a fun way to learn. Access more than 100 self-paced online learning trails that take the guesswork out of where to begin and where to go next.

Premier Success Plan

Premier Success Plans give you direct access to Salesforce experts who'll help you speed up adoption, deploy efficiently, and get on the fast-track to certification.

Many of our most successful customers see an even higher return on their investment in Salesforce with a Premier Success Plan. Premier and Premier+ help you resolve issues quickly and incorporate best practices.

Premier Success Plan includes all the Standard tools, plus additional guidance, support, and training services to help you achieve your business goals.

Premier Guidance

With a Premier Success Plan, you'll work directly with Salesforce experts who can help you get more value from your solution.

Success Management - You gain access to a 'success manager' who knows your business and your Salesforce solution. Your success manager can help you achieve your business priorities while following best practices to increase adoption and get more value from Salesforce.

Premier Expert Coaching Sessions - These coaching sessions with Salesforce experts help you take advantage of key Salesforce capabilities — without taxing your team or requiring a major time commitment and scope of work. Premier plans give you access to a library of more than 30 Accelerators, and Premier+ gives you access to more than 65 Accelerators.

Exclusive Events - Learn best practices and strategies with events designed for Premier customers and hosted by Salesforce experts.

Premier Support

Premier Success Plan helps you resolve technical challenges quickly, giving you access to Salesforce experts and quick response time.

24/7 Phone Support Get expert answers from our skilled technical support team, 24 hours a day, 7 days a week. Our success agents staff 16 locations globally and speak 11 languages.

1-Hour Response Time Your cases are routed to a Premier queue and managed by our most experienced support representatives. Response times are as fast as one hour for critical cases.

Premier Training

Get access to online training courses and certification prep materials with Premier Success Plan.

Role-Based Online and Video Learning Premier Success Plans include an extensive online training library with more than 100 courses. Your team will find convenient, role-based training available in self-paced modules. Get step-by-step training when it's convenient, without additional expense or time away from the office.

Certification Prep Courses and Practice Exams*

Premier customers can now prepare for the Salesforce Administrator Certification Exam and other certification exams with prep courses.

Information Assurance

Information Assurance does not apply to Success services.

2. Data Backup / Restore and Disaster Recovery

Data Backup does not apply to Success services

3. On-Boarding

Select the level of Success plan you require at the same time you purchase an associated Salesforce Software-as-a-Service or Platform-as-a-Service product.

3.1. Off-Boarding

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

3.2. Termination

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

3.3. Data Extraction and removal

Data Extraction does not apply to Success services

4. Pricing Summary

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

5. Service Constraints

Please refer to our Terms and Conditions for further detail

6. Service Management

Does not apply to Success services

7. Customer Responsibilities

Following agreed support processes.

8. Client-side Technical Requirements

Salesforce skills as required to maintain the application and work with support to address any issues.

9. Planned Maintenance Windows

Does not apply to Success services

10. Training

Online, on-premise and custom training are all available.

11. Data Centre Locations

Does not apply to Success services

12. Performance

12.1. Service Levels

Please see section 1.4 above.

12.2. Incident Response Time

Please see section 1.4 above.

12.3. Incident Updates

Please see section 1.4 above.

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