

Insight Direct (UK) Ltd

Salesforce CRM Analytics

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



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Salesforce CRM Analytics

1. Service Description

CRM Analytics dramatically extends our customers' Salesforce investment by providing a powerful, visual analytic capability natively in Salesforce. Our customers do a lot in Salesforce today. But, since they engage customers in multiple ways using multiple systems, and not all of their data lives in Salesforce, the Einstein Analytics Platform allows them to bring all their data together to have one view of their business across any metric and KPI.

1.1. Service Overview

For Salesforce Users

Traditional BI tools are designed for complex analysis, but are built for an analyst. Einstein Analytics is specifically designed for front office sales, service or marketing users. Einstein Analytics closes the gap between the business user and insight to have a data-driven conversation.

Mobile Self-Service

Business users freely explore and drill through data to get answers, just like how we do a Google search. And users get the answers they need on any device – on the desktop, or on the phone.

Cloud Trust & Speed

Einstein Analytics native to Salesforce. This means you can unlock customer insights right from your CRM, without having to switch systems. It also means you can embed insights directly onto Salesforce objects, such as Accounts or Contacts. Additionally, it's built on Salesforce's #1 trusted cloud platform, which means it's scalable, secure, and enterprise ready. You'll get the same innovation, 3 releases a year of new features.

Service Analytics

Discover insights for every channel and customer conversation. Automatically populate dashboards with Service Cloud data, and gain visibility into your business with omni-channel, chat, activity, and backlog analysis. Then, embed customer service dashboards anywhere in your CRM to increase visibility within the company and promote collaboration.

Reach faster resolutions and create happier customers when you explore and act on trends in every channel. With Service Analytics, agents and managers can create tasks, escalate cases, or even open opportunities from within the Salesforce apps you already use, on any device.

Deliver personalised service with predictive CSAT-based existing Salesforce data and trends. Every employee can stay ahead of business concerns by identifying product

issues, customer issues, and churn risks with data-driven insights. And reps resolve issues faster and get recommendations for the next best actions.

Easily drill into customer profiles and case history with Service Analytics. Optimise agent productivity and case queues to deliver better customer experience. Create cases, update case history, and collaborate with your team directly from the Service Cloud console you already use. Since it's not structured like legacy business intelligence solutions, you can quickly diagnose service issues and find the best answers quickly.

Sales Analytics

Sales Analytics App delivers a complete view of customer data, pipeline health, best practices for closing deals, and more for Sales Cloud customers.

Easily share best-practice dashboards among your entire sales team. Power your weekly pipeline call, quarterly business review, and performance metrics using Sales Analytics templates prepopulated with your Sales Cloud data and preconfigured with key performance indicators (KPIs).

Sales managers can finally track year-over-year business performance and get a better view of the big picture. Review pipeline movement and risk indicators, and forecast metrics to identify behaviours that drive sales.

Create or update records and objects with newfound insights or answers, right within the app — instantly communicate your findings and collaborate on next steps through Chatter, on any device.

1.2. Service Features

- Take action on insights into any business process in Salesforce
- Easily build, customise, and extend to meet your business needs
- Make smarter decisions with AI-powered discovery, predictions, and recommendations
- Quickly explore millions of data points
- No-code & Low-code declarative configuration, Open API integration, Training included.
- Descriptive, Diagnostic, and Prescriptive analysis
- Built on the proven Salesforce Platform facilitating agile development
- Open, API first service for easy integration (SOAP and REST)

1.3. Service Benefits

- Analytics built into your Salesforce data
- Act at the point of insight
- Fast time to delivery, out-of-the-box analytics
- Lower costs, quickest way to provide analysis to end users
- In-built security and identity model - save time and money.
- Increased adoption from easy-to-use UI
- Integrate with back office data using free APIs
- Mobile-first, analyse your data wherever you are

- Get answers and share findings from anywhere with in-built collaboration
- GDPR & CE+ compliant

1.4. Main components & Functions of this service

Connected Applications

No more waiting for IT to install hardware and optimise software before you can ask questions or take action. With Salesforce as your CRM, analytics is built into your data.

Act at the point of insight.

Now when you find an answer, you can quickly take the next step with built-in tools called Einstein Actions. Create a task, update a record, share insights, and more — without waiting around for legacy technology or data analysis.

Get out-of-the-box analytics.

No more hardware hiccups and untimely software updates. Einstein Analytics is reliable, convenient, and gets up and running much more quickly than traditional solutions.

Apps for Sales

Sales Analytics comes preloaded with all the lenses and dashboards you need for sales, so reps can quickly identify account whitespace, and get a complete picture of the customer. And managers can see into the pipeline, track team performance, and uncover new opportunities.

Apps for IT

With Einstein Analytics Platform for Event Monitoring, you can view application performance, understand adoption and usage, and access security data about all your Salesforce apps. Quickly improve your overall Salesforce experience and see who's accessing critical business information.

Apps for Service

Service Analytics includes dashboards and lenses that can help your whole team deliver better service. It's embedded right into the Lightning Console, giving agents a 360-degree view of customers. And it's the easiest way for managers to track case trends, agent efficiency, and channel optimisation.

Mobile-First

Einstein Analytics is designed for mobile and optimised across every device, for both Android and iOS. So mobile never feels like an afterthought, it's the first thought.

On-the-Go Collaboration

Get answers and share findings from anywhere. Analytics lets your whole team have a conversation around data, collaborate on answers, and present from any device.

Faster Data

No more hardware hiccups and untimely software updates. Analytics is reliable, convenient, and gets up and running much more quickly than traditional solutions.

Contextual Dashboards

With Analytics, you can embed dashboards across the Customer Success Platform — from Sales Cloud, to Service Cloud, to Community Cloud — to give your employees and partners a consistent view of data and access to new insights.

Secure Data Exploration

Powerful protection and controls ensure that your company's data is always secure, so you and your entire team can confidently collaborate through every type of device, including Android and iOS.

2. Information Assurance

Salesforce holds a suitably scoped ISO:27001 certificate that covers the majority of its core services, please refer to the Salesforce Security, Privacy and Architecture (SPARC) documentation [here](#) for further product specific information. In addition, for country and product specific compliance please refer to this [link](#) for current status.

Salesforce.com EMEA Limited and its affiliates are committed to achieving and maintaining customer trust. Integral to this mission is providing a robust security and privacy program that carefully considers data protection matters.

In the UK Salesforce has completed an external CHECK Security assessment performed against its core services by a CREST member organisation, Salesforce also holds a current Cyber Essentials certificate, again completed by a CREST member organisation and can provide a response to the NCSC 14 security principles upon request.

In accordance with the EU Data Protection Directive and implementing national legislation, the Salesforce Processor BCR (Binding Corporate Rules) is intended to provide an adequate level of protection for Personal Data during international transfers within the Salesforce Group made on behalf of Customers and under their instructions, further information is available here <https://secure.sfdcstatic.com/assets/pdf/misc/Salesforce-Processor-BCR.pdf>

Salesforce adheres to the principles of the EU-U.S. Privacy Shield framework with respect to personal data submitted by Salesforce's customers in reliance on the Privacy Shield to the following online services: Sales Cloud, Service Cloud, Force.com, Communities, Chatter, Site.com, Database.com, Analytics Cloud, Financial Services Cloud, Health Cloud, Heroku, Pardot and Configure, Price, Quote (CPQ) <https://www.salesforce.com/assets/pdf/misc/privacy-shield-notice.pdf>

In addition, we currently hold the following certifications:

Geographical Recognition

- TRUSTe Certified Privacy Seal
- Japan Privacy Seal from the Japan Information Processing Development Corporation (JIPDC)
- TUV Certificate
- FedRAMP
- Cyber Essentials
- Privacy Shield

Global Audit Compliance

- ISO 27001, 27017, 27018, 9001, 42001
- SSAE 18/ISAE 3402
- SOC-1
- SOC-2
- SOC-3 (SysTrust)
- PCI-DSS
- Cyber Essentials

Learn more here: [Salesforce Services Trust and Compliance Documentation](#)

Relating to the Government Security Classification (GSC) scheme and the National Cyber Security Centre (NCSC), Salesforce has various Public Sector customers, holding a variety of data at OFFICIAL and OFFICIAL-SENSITIVE levels. Further Salesforce has various documents to assist organisations assessing the Security posture of Salesforce such as a response to the NCSC 14 Security principles. Please contact us for up-to-date information and access to additional information.

3. Data Backup / Restore and Disaster Recovery

Redundancy and Scalability

The Salesforce service is built for high availability across 3 availability zones within the region. Each availability zone includes the following:

- Multiple network carriers for customer connectivity
- Multiple ISPs for customer transit and internal replication
- Multiple dedicated connections for DR/BCP
- Redundant cloud-based networking infrastructure
- Web, Application, API, Cache, Search, Index, Query and Batch servers are load balanced and live within multiple availability zones within the region, with failover capabilities
- Database servers are replicated both within the same availability zone for performance reasons, and across 3 availability zones to ensure availability.

Extensive use of high-availability servers and network technologies, and a carrier-neutral network strategy, help to minimise the risk of single points of failure, and provide a highly resilient environment with maximum uptime and performance. The Salesforce Services are configured to

be N+1 redundant at a minimum, where N is the number of components of a given type needed for the service to operate, and +1 is the redundancy. In many cases, Salesforce has more than one piece of redundant infrastructure for a given function.

Salesforce provides Enterprise class recoverability through replication of data across three distinct availability zones.

Disaster Recovery

Salesforce Hyperforce based cloud services has its compute resources run in 3 Availability Zone (AZ). Services run as containerized applications in containers which are configured for HA (high availability) by distributing nodes across AZs. To take advantage of this, service pods themselves are deployed across AZs when scheduled on nodes. Because of this when one AZ goes offline there will always be available service pods in different AZs to handle the workload. Service pods are also stateless so losing an AZ and nodes in that AZ along with the service pods running in them will cause no loss of data and new service pods will be scheduled on the available zones to handle the load.

Product-specific information is available in the Security, Privacy and Architecture (SPARC) documentation for the respective services available on our website (<https://www.salesforce.com/company/legal/trust-and-compliance-documentation/>), and customers can view detailed policy documentation at <https://compliance.salesforce.com/en/disaster-recovery-bcp>.

Backup

Salesforce is making backups of customer data, as outlined above, for the purposes of providing a resilient service for customers. These backups are not designed for customer use.

To help customers routinely back up their data, Salesforce offers several native options that are available for no additional cost to customers. Salesforce provides tools like Data Loader and the API as a method for customers to manually restore their data. It is important to note the order in which data is restored, so that relationships and the connection to related records can be preserved.

The following documentation and options are available to customers as a method of backing up their data:

- Data Export Service: Manual or scheduled exports of your data via the UI. Export Backup Data from Salesforce:
https://help.salesforce.com/s/articleView?id=xcloud.admin_exportdata.htm&type=5.
- Data Loader: Manual on-demand exports of your data via the API. Export Data:
https://help.salesforce.com/articleView?id=exporting_data.htm&type=5.
- Report Export: Manual on-demand exports of your data via reports. Export a Report:
https://help.salesforce.com/articleView?id=reports_export.htm&type=5.
- Salesforce Backup and Restore product:
<https://www.salesforce.com/platform/data-backup-recovery/>

Restore

Salesforce offers several native options at no additional cost to help customers routinely back up their data. Depending on your edition, your org can generate and export backup files on a weekly or monthly basis. Individual users can view and restore their deleted records from the Recycle Bin, where all deleted records reside for 15 days before being deleted from the system. Admins also have access to an org-wide Recycle Bin to restore or permanently delete records during the 15-day window. Salesforce also supports manual restore via Data Loader and API.

As an add-on solution, Salesforce Backup and Restore provides additional backup and restore capabilities. You can configure and maintain automatic backups, make a backup on demand, and quickly find and restore data. You can control the order in which data is restored to preserve relationships and connections to related records.

4. On-Boarding

Describe how easy and simple it is for a customer to On-Board to our service

4.1. Deployment

Salesforce is a SaaS (Software as a Service) solution and users access the tools via a web browser. Therefore, no software or hardware deployment is necessary. Implementation takes the form of assigning usernames and passwords to staff and (if needed) completing webinar-based training on the application.

4.2. Configuration and Customisation

The service provides many configuration options, including integration with custom applications. Details can be found [here](#)

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.

For further details of data extraction and removal, please refer to section 5.2 below.

5.1. Termination

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

The Supplier would never terminate except for buyers' material breach of the Call-Off Contract and the terms.

5.2. Data Extraction and removal

With a commercial model that requires customer trust to be at the core of everything we do, Salesforce also helps ensure that our customers can exit our service with open and transparent processes and clearly defined commercial considerations. As such, should for any reason a customer wish to cease using the Salesforce service then outlined below are some of the key

technical considerations for ending the subscription service and extracting both the customer's data and the technical investment made in the platform. Further detail relating to an exit strategy can also be discussed on understanding the nature of any potential solution

- Within 30 days post contract termination, customers may request return of their respective Customer Data submitted to the Covered Services (to the extent such data has not been deleted by Customer). Salesforce shall provide such Customer Data via a downloadable file in comma separated value (.csv) format and attachments in their native format. Note that Customer Data your organisation submits to Einstein Analytics instance groups for analysis is derived from other data to which your organisation has access, for example, data stored by your organisation using Service Cloud, Sales Cloud, third party applications, etc.
- Data export is provided at no additional charge. Full details are contained in our terms.

Salesforce understands the intentions of G-Cloud, and is keen to support customers adoption of cloud technology, however that should also include knowing how to leave a given cloud technology. Salesforce has an exit strategy paper that can be used to help plan a path away from Salesforce. Notwithstanding that Salesforce has one of the lowest attrition rates in the industry, we remain committed to your success. Continued investment is how we sustain 3 upgrades every year and a constant delivery on new innovation in every update.

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

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

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.

Browser requirements

Salesforce supports a range of popular browsers. Learn more: [Supported browsers](#)

Internet access

Salesforce is designed to use as little bandwidth as possible, so that the service performs adequately over high-speed, wireless and mobile Internet connections.

While average page size is on the order of 90KB, Salesforce supports compression as defined in the HTTP 1.1 standard to compress the HTML content before it is transmitted as data across the Internet to a user's computer. The compression often reduces the amount of transmitted data to as little as 10KB per page viewed, due to the lack of image content. The site was designed with minimum bandwidth requirements in mind, hence the extensive use of colour coding instead of images. Our average user also is known to view roughly 120 pages from our site per day. However, it is best to measure any page that has been customised, especially if Visual Force components have been added to the page, to get an accurate measurement of the page size.

Our application is stateless; therefore, there are no communication requirements in the background once the page loads like traditional client server applications e.g. Outlook, therefore, once the page loads there are no additional bandwidth requirements until a user queries or writes information to Salesforce. Further information here

<https://help.salesforce.com/articleView?id=000004958&type=1>

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 trust.salesforce.com 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

We provide webinar-based and instructor led training for the majority of our services. Details can be found in our separate listing for Salesforce Training also listed on the Digital Marketplace.

Further information can also be found here:

https://www.salesforce.com/services-training/training_certification/training-by-cloud.jsp

13. Data Centre Locations

For the Salesforce Services (services branded as Force.com, Site.com, Sales Cloud, Service Cloud, and Chatter), if a new 'Org' of the Salesforce Service is provisioned for a Customer with a billing address in the UK, Customer Data in that 'Org' is stored in data centres in England.

In addition, Salesforce may store information in data centres located outside of EEA, such as identifying information, relating to the Customer's instances(s) of Salesforce Services and users for the purposes of operating the Salesforce Services, such as facilitating the login process and the provision of customer support.

Such identifying information as provided by the Customer in its provision of user accounts shall only include the following personal data about users: first and last name, email address, username, phone number, and physical business address.

For other services which are not Salesforce Services, Salesforce uses various data centres located throughout the world. The location of Salesforce data centres for all services is specified in the Salesforce Infrastructure and Subprocessors Documentation, available under the following link - <https://www.salesforce.com/company/legal/trust-and-compliance-documentation/>

14. Performance

Full details are contained in our terms.

14.1. Service Levels

We will use commercially reasonable efforts to make the services available 24 hours a day, 7 days a week, except for:

- Planned downtime (see section 13).
- Any unavailability caused by circumstances beyond our reasonable control, including, for example, an act of God, act of government, flood, fire, earthquake, civil unrest, act of terror, strike or other labour problem (other than one involving our employees), Internet service provider failure or delay, non-Salesforce application, or denial of service attack.

14.2. Incident Response Time

The incident response time varies from 15 minutes to two days depending on the level of support selected. Details can be found in section 8

14.3. Incident Updates

Incident update intervals vary based on the level of support selected, ranging from every 30 minutes to longer periods. Details can be found in section 8.

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