Salesforce Partners

Rules of Engagement

Agenda

- **Pre-Sales ROE**
  - Co-selling
  - RFP Collaboration
  - Scoping Calculator

- **Post-Sales ROE**
  - Project Initiation
  - Ongoing Tasks
  - Deliverable Review

- **Support Functions & ROE**

- **Pricing and Packaging**

Pre-Sales
Rules of Engagement

Co-Selling

Partner Sources Deal:

Steps	Task	Owner	Notes
1	Partner sends lead to Salesforce	Matt Thompson	Salesforce will identify/clear potential channel conflict, confirm participation, register deal to partner
2	Salesforce assigns D&I AE and makes introduction to Partner	Matt Thompson	Partner will share discovery notes with AE AE will be main POC during the sales process
3	Salesforce D&I AE pulls in SE as needed for demonstrations	D&I AE	Demonstration will be lead by SE, but will be co-presented to the client in a collaborative effort with partner
4	Implementation services are scoped	Partner	See slide 6

Salesforce Sources Deal:

| Steps	Task	Owner	Notes
1	Salesforce shares lead with Partner	Matt Thompson	Partner identifies/clears potential channel conflict and confirms participation
2	Salesforce makes introduction of AE to partner	Matt Thompson	AE will share discovery notes with Partner
3	Implementation services are scoped	Partner	See slide 6
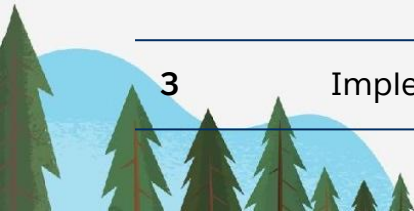
RFP Collaboration

Partner identifies an RFP they would like to jointly respond to with Salesforce

Steps	Task	Owner	Notes
1	Partner shares RFP with Salesforce	Matt Thompson	
2	Salesforce assigns AE and makes introduction to Partner	Matt Thompson	Salesforce will confirm participation and response approach ● Does partner lead, and Salesforce assist, or vice versa? In most instances, partner will lead
3	Partner takes a first pass at RFP and flags gaps/open questions and shares with Salesforce AE	Partner	A shared Google sheet is often the best way to collaborate
4	Salesforce AE will source responses to outstanding questions	D&I AE	Partner should expect a 48 hour turn-around SLA, and factor that into their response timelines
5	If required for RFP, Salesforce will help partner scope implementation	Matt Thompson	See slide 6
Ongoing	Salesforce AE and Partner will have cadence check in to track delivery progress	AE/Partner	
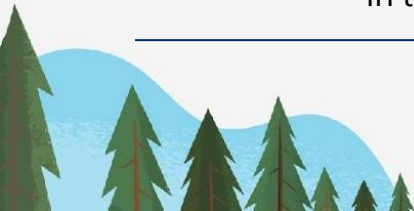
Scoping a Salesforce Implementation

Partner will have access to the following scoping resources:

- Scoping calculator

- Sample scope language

- Sample use cases and template library (to come in June)

- Sample requirements blueprint (to come in June)

PLEASE NOTE: For partner's first implementation, it is recommended to share the project plan, scope, and use cases with Salesforce for review prior to SOW signature by the client

Scoping Calculator

A tool to derive LOE associated with an Salesforce implementation, inclusive of:

- Discovery

- Platform Set up

- Data Feed Ingestion

- Campaign Deployment

- Integrations to Salesforce Systems*

some available today, others coming soon

Implementation Package	Solutions Architect	Technical Architect	Project Manager	Tech QA (SA+IA)	Reference Notes
Rate/Role	$215	$225	$185	$175	
Use Case Discovery & Blueprinting					
Implementation & Use Case Discovery (6 hour workshop)	25	0			Includes workshop prep, 6 hour workshop, and workshop distillation.
Additional Discovery Hour Block	2				
Use Case Discovery Hours	50	0			Output is a Blueprint (Business Requirements Document) for site mapping, ETL feed mapping, requirements per use case.
Use Case Discovery Cost	$10,750	$0			
Evergage Platform					
Platform Setup	10	40			**Platform setup includes** site mapping, ingesting Salesforce Marketing Cloud engagement data, configuring Evergage standard Salesforce Sales Cloud integration (includes bi-directional syncing of contact attributes), standardized identity type configuration.
Initial Implementation Domain	1				
Additional Domains	3				**Number of Domains:** Sub-domains are included. Example: test.com and sample.com are 2 domains.
Platform Setup Hours	25	100			
Platform Setup Cost	$5,375	$22,500			**Not Included:** customizing Identity Gear (no fuzzy matching), multiple locale/currency support, customization of SF integrations
Standard Data Integration					
Data Feed	5	5			**Examples of feeds:** customer data from an external system, catalog feed, offline transactions, call center activity etc.
Number of Feeds	4				All feeds will be required to match Evergage feed specifications. https://doc.evergage.com/display/EKB/CSV+Feed+Requirements
Data Feed Hours	20	20			Addtional effort required for data manipulation/transforms is not

Post-Sales

Rules of Engagement

A point of clarification...

The following steps are meant to be followed for the first 1-2 implementations that a partner does to ensure both the partner's, and the client's, success.

In the near future, partners will be empowered to act more autonomously and only involve Salesforce when needed.

Project Initiation

Steps	Task	Owner	Timeframe	Notes
1	Assign Customer Success team member	Salesforce	Within 1 week of contract signature	CS representative will be a resource for the first 6 weeks of the engagement.
2	Salesforce-Partner Kickoff	Matt Thompson	1 week prior to client kickoff	Align on roles and responsibilities, governance, and communication plan
3	Provision Interaction Studio Instance	Salesforce	Within 1 week post contract signature	Salesforce will add one client user to the instance. That user will be responsible for adding agency partners to the platform
4	Client Kickoff	Partner	Within 1 week post contract signature	
Ongoing	Weekly Salesforce-partner status meeting	Partner	Within 48 hours of client status meeting	For the first 6 weeks of the partner's first implementation

Deliverable Reviews

During a partner's first implementation, Salesforce highly recommends reviewing your:

1. Blueprint Document

   a. Requirements for site mapping, data feed mapping, and campaign execution

2. Sitemap code

3. Use case templates and triggering rules

Deliverable Review Process

Steps	Task	Owner	Timeframe	Notes
1	Email [support@evergage.com] with your review material Email subject line should read: **Deliverable Review - [DELIVERABLE] - [PARTNER NAME] - [CLIENT NAME]**	Partner	--	This email will automatically create a support ticket. Partner can submit each deliverable for two reviews. An example subject line would be: **Deliverable Review - Blueprint - Slalom - Nike**
2a	Review deliverable and provide feedback and/or QA notes	Salesforce	72 hours	Salesforce will respond directly to the ticket
2b	Discuss additional deliverable feedback/questions	Salesforce and Partner	In weekly meeting	
3	Revise deliverable per Salesforce feedback and resubmit to Support email channel	Partner	Partner's discretion	
4	Provide final review/approval notes to the ticket	Salesforce	48 hours	

Support
Rules of Engagement

Ongoing Support

Use these outlets in ascending order based on issue priority

1
Partner Community

For **non-client specific inquiries**, please add your question in the Surge Partner Forum within the partner community.

This group is being actively monitored by the Salesforce team.

Partner Community Group

2
Weekly Meeting

For **client specific questions that are not time sensitive**, please save them for your weekly Salesforce project status meeting. Your Customer Success team member will be able to assist.

3
Support Line

For time sensitive client related inquiries, please email support@evergage.com

The Salesforce support team will get back to you within 24 hours

Examples of Good Partner Community Question

"I want to present [xyz…] use case to my client, but I'm not sure it can be accomplished by Evergage. Can you advise?"

"I'm answering an RFP question and need to know where Evergage data centers are located. Please advise."

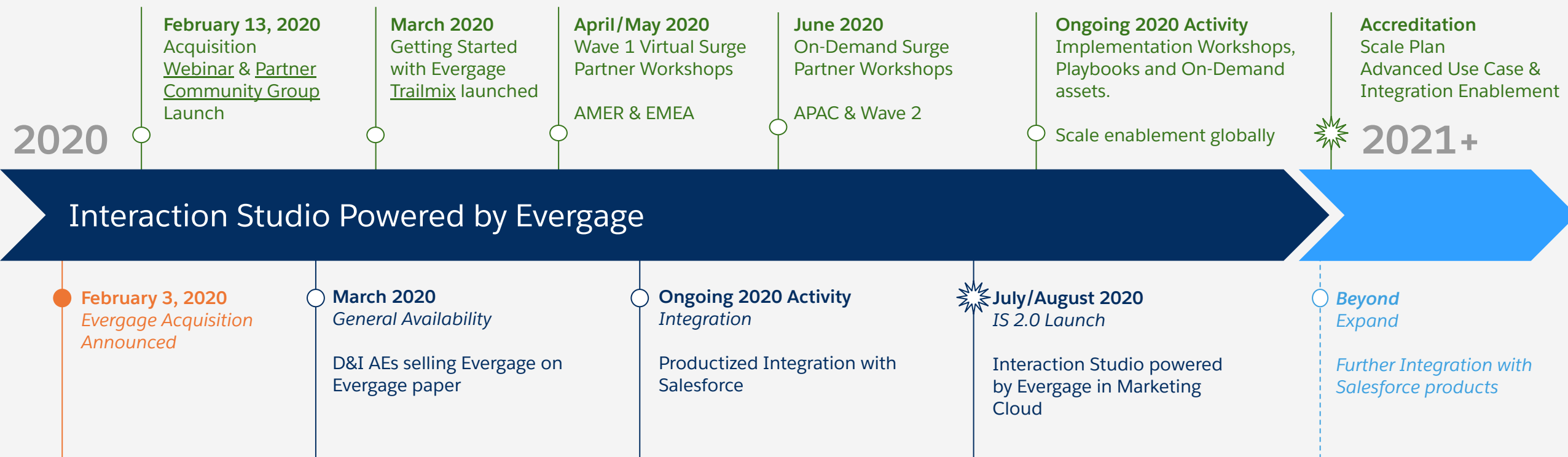"We're building a new gear in our sandbox and hit a roadblock. Can you help?"

Enablement Plan

Partner Enablement Plan
Key Milestones aligning with Product Roadmap

Salesforce

2020

February 13, 2020
Acquisition
Webinar & Partner
Community Group
Launch

March 2020
Getting Started
with Evergage
Trailmix launched

April/May 2020
Wave 1 Virtual Surge
Partner Workshops

AMER & EMEA

June 2020
On-Demand Surge
Partner Workshops

APAC & Wave 2

Ongoing 2020 Activity
Implementation Workshops,
Playbooks and On-Demand
assets.

Scale enablement globally

Accreditation
Scale Plan
Advanced Use Case &
Integration Enablement

2021+

Interaction Studio Powered by Evergage

February 3, 2020
*Evergage Acquisition
Announced*

March 2020
General Availability

D&I AEs selling Evergage on
Evergage paper

Ongoing 2020 Activity
Integration

Productized Integration with
Salesforce

July/August 2020
IS 2.0 Launch

Interaction Studio powered
by Evergage in Marketing
Cloud

Beyond
Expand

*Further Integration with
Salesforce products*

Interaction Studio | Evergage

Partner Enablement Path

Your one-stop shop for all things Evergage!

Join
the Community Group "Interaction Studio | Evergage"

Watch
the Acquisition Announcement Webinar

Trailmix
"Getting Started: Introduction to Interaction Studio powered by Evergage"

GTM Content First Call Deck!

Surge
Hands-on Virtual Workshops
Q2 - Select Partners

salesforce
+
evergage

Scale
Hands-on self paced training modules
Q3

Accreditation
Advanced Accreditation Exam
Q4

Train the Trainer

How to Enable Implementation Consultants in your Practice

salesforce

Step 1

On-Demand
New training guide available in the Community Group* Consultants should request access

Step 2

Administration
Instructions on how to add users and administer your partner sandbox available in the Community*

Step 3

Support
Consultants that have been through training should be the first line of defense for questions

Step 4

Community
Ask questions in the Community Group* If the internal team doesn't know the answer

*Evergage Surge Partners Community Group

Additional Enablement Content

Role	Asset
Sales	How to sell and position Evergage. Custom demo resources.
Strategist	Advanced Use Case Workshop
Technical	Salesforce Integration

Look for additional enablement resources launched in the partner community groups
Evergage Surge Partners & Interaction Studio | Evergage