PACIFICPOINT
Business & IT Consulting

Pacific Point Inc
427 Launiu St., Suite 609
Honolulu, HI 96815
August 9, 2017

State of Hawaii, Office of Enterprise Technology Services
1151 Punchbowl St, B20
Honolulu, HI 96813
Derek Ichiyama, derek.t.ichiyama@hawaii.gov

RE: RFI for Internet Portal Manager and Service Provider - RFI No.: ETS.FY18.RFI.001

Mr. Derek Ichiyama:

Pacific Point Inc (Pacific Point) is providing this cover letter with respect to the Request for Information (RFI) for Internet Portal Manager and Service Provider outlined for the State of Hawaii, Enterprise Technology Services (ETS).

Pacific Point is a Hawaii-based business and technology consulting company located in Honolulu founded by highly experienced IT professionals. With years of large-scale business application implementations in a wide variety of industries, our team built Pacific Point using each lesson-learned as a building block. Our core competency is in implementing enterprise applications with specialized expertise in Customer Relationship Management (CRM) and Business Intelligence (BI).

While do not specialize in managing State Internet Portals, as a Salesforce Consulting partner, we work with Salesforce which is widely used for public facing websites. Therefore, our response will not be able to touch on all the information requested, however wanted to provide information that may be of value as the State makes future plans. We have conducted research on state internet portals (along with Salesforce) to gather and provide information and options. This information is based on industry best practices for the objectives of managing a state internet portal for providing public information and services.

We also are including our Capability Statement, describing our strengths and past performance, as well as Salesforce's Capability Statement which could be used as a part of a solution for an internet portal.

Thank you for the opportunity to respond to this RFI.

Sincerely,
Deena W. Tearney

Deena W. Tearney
Chief Executive Officer, Pacific Point

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2 PACIFIC POINT CAPABILITY STATEMENT

PACIFICPOINT
Business & IT Consulting

Capability Statement

Capabilities

Pacific Point Inc (Pacific Point) is a Hawaii-based Business and IT consulting firm specializing in managing and delivering enterprise solutions for commercial and public sectors.

Strategic Consulting

Aligning technology to your business strategy.

- Strategic Planning & Assessment
- Vendor Selection & Assessment
- Change Management & Training
- Agile Transformation
- IT Services Management Transformation

System Implementation Services

Implementing and managing large enterprise applications, business transformation and system replacement.

- Program & Project Management
- Business Analysis & Business Process Reengineering
- Technical Delivery
- Testing & Quality Assurance

Company Snapshot

Founded in 2011

Located in Honolulu, HI & Alexandria, VA

DUNS: 969770176

CAGE: 6UNP2

NAICS: 541511, 541512, 541519, 541611, 541618. 541690

Business Type: **Woman Owned Small Business**

Contract Vehicle: GSA IT Schedule 70

SIN 132-51 IT Professional Services

GSA Contract Holder
GS-35F-048GA

Differentiators

Our People: Founded by highly experienced IT professionals. With years of large-scale business application implementations in a wide variety of industries our team built Pacific Point using each lesson-learned as a building block. We are a consulting firm that represents the culmination of the strength of that experience.

Customer Relationship Management (CRM):

- Extensive experience in people, process and technology CRM best practices.
- Salesforce Consluting partner.

Business Intelligence (BI):

- Proven capabilities in developing strategies to analyze information to optimize decisions and performance.
- Tableau partner.

Service Delivery:

- Offers flexible delivery models including blended local / remote teams.
- Can integrate seamlessly with client teams.

Contact Info

Deena White Tearney
Chief Executive Officer

Phone: (808) 228-0581

Fax: (808) 744-3647

Email:
deena.tearney@pacificpointcorp.com

www.PacificPointCorp.com

www.PacificPointCorp.com

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Capability Statement

Past Performance

Kamehameha Schools
Full lifecycle implementation of a **Salesforce** solution to manage learning programs to allow educators to manage courses and enroll students. Also built **Salesforce Communities** for teachers to set and assess students and develop their
goals.

PEMCO
Provided technology assessment services, vendor selection and CRM strategy and implementation. Manages all **SugarCRM** projects within the program.

Hawaiian Airlines
Assessed, designed and developed a **Salesforce** solution to manage travel & vacation sales promos. Utilized detailed workflow routing with custom **Apex Code** and architecture for multi-channel inputs for assignments and detailed analytical reporting.

IBM
Implemented **Cognos** data warehouse and reporting solution. Provided insight with requirements analysis, business logic definition, "to-be" process maps, change management, and full system testing and user acceptance testing (UAT).

Bank of Hawaii
Implemented a custom scalable application with an easy to use User Interface for all employees. App used a variety of technologies including **Bootstrap**, **.NET, C#, MS Entity Framework** and **Oracle**. Managed full lifecycle from requirement definition to deployment.

Our Consultants

Within our team, we have the following certifications:

- Project Management Professional (PMP)
- Salesforce Certified Administrator
- Salesforce Certified Consultant
- Salesforce Certified Advanced Administrator
- Salesforce Certified Developer
- Salesforce Certified Service Cloud Consultant
- Salesforce Certified Sales Cloud Consultant
- Salesforce Certified Platform App Builder
- Tableau Desktop Qualified Associate

salesforce registered consulting partner

www.PacificPointCorp.com

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3 FUNDING/OPERATING MODELS

State internet portals are usually operated and funded as separate entities from the other main functions of a State CIO or technology office. In some cases, the internet portal is an independent agency controlling and operating its development, content and financials. These independent internet portal agencies are comprised of board members from the executive, legislative and judicial branches as well as the private sector. The State can have a relationship with a vendor partner in designing, developing and operating the internet portal to various degrees. The models below describe three main models for funding and operating a portal:

1. **Self-Operated**: In this model, a state manages and maintains their own portal infrastructure and web applications. **California** is an example of this model. The staff managing the activities are state employees, the priorities are set by the state and any revenue from fees typically cover expenses and supports investments. In this model, the state would have brought the initial funds to the table.
2. **Self-Funded A**: In this model, a state releases a Request For Proposal (RFP) and partners with someone in the private sector (vendor/consultant/system integrator) to build the portal and key web applications. The state funds the initial build, but moving forward the web applications need to bring in enough revenue to fund the operations and all new web applications are funded at the agency level. **Arizona** utilizes this model.
3. **Self-Funded B**: In this model, a state releases a RFP and partners with someone in the private sector to build the portal and key web applications. The state does not provide any up-front funding, but rather allows the partner to be the merchant of record for credit card process and charge a fee. The states will also allow the private sector to sell driver licenses records to insurance companies. These two sources of funding are then used to maintain the long-term viability of the portal, fund upgrades, pays for the FTE that are contract staff and the oversight group that are state employees. **Colorado** falls into this category.

4 INCREASING REVENUE

State internet portals that are wholly or partly funded through its transactions frequently must re-assess and develop new strategies to increase and maximize revenue. Below are some options the State may want to consider:

1. **Put more services online**: The State could review what transactions and services they currently manage and determine if additional services could be offered. There may be services not currently online and/or operated by other departments in the State that would benefit from

being managed under the internet portal for a seamless, easy to use and one-stop location for citizens for information and services.

2. **Give the State a larger percentage of revenue already collected**: Depending on the contract with the partner/vendor and/or credit card processing vendor the State could re-negotiate terms so that more funds would be allocated to the State for transactions.

3. **Charge more for services already online**: The State could increase the fees for existing services. This however could face political and constituent backlash. The State could review how much other states (considering similar populations and economies of scale) charge for online services. The State should review their prices to gauge if they are in accordance with the average and are above or below costs. If they are below there could be more leverage to increase prices.

4. **Sell records (such as driving) to insurance agencies and provide online interfacing (API codes):** Many state portals for a large revenue stream for reinvestment sell records to insurance agencies and allow electronic interfacing for easy and rapid transmission.

5 RECOMMENDED TRANSITION TO A NEW SOLUTION & PROVIDER

In migrating the State Internet Portal to a new provider and solution there are technical and operational plans and risks. New technology and provider theoretically will bring a better functioning portal operational model providing citizens with better access and service. However, it is important to have a transition plan, from legacy to new, be in place to make to process as seamless as possible to keep the functionality and operations of the portal intact.

5.1 TECHNICAL

The internet portal will have multiple applications hosted on one site performing various functions. Salesforce, for example, could be designed and deployed in iterations to have specific modules take over specific web application functionality, while operating the entire portal itself.

It is recommended that the most highly used applications by transactions (such as driver's licenses) be developed and deployed first in the first 6-9 months. Then bring the remaining applications within the next 12-18 months. Concurrently have all the applications accessible on the same platform even if they have not all yet been transitioned. Salesforce Communities has the functionality to have one landing page holding all the web applications. If an application had not yet been transitioned to the new solution the legacy product could still be accessed through the Community. This aggregate would allow the user to see all the applications in one place even as certain functionality is transitioning to the new solution.

The benefit of this is that it presents consistent branding of the Internet Portal early in the transition process while quickly providing solution modernization to the front end for functionality and user experience (UX).

5.2 OPERATIONAL

Transitioning to a new operational model with a new provider/vendor has both financial and support risks. As the transition occurs and less transactional functionality performed on the legacy portal the relationship between the State and the vendor could be problematic. For example, a vendor may be less responsive to service issues with the portal (SLAs) if they are receiving less payments from portal transactions. The State therefore should plan and consider separate funding for maintenance and service of the portal during this period for applications that had not yet transitioned to the new solution.

It is recommended for the new solution to work with one partner/vendor. Working with multiple partners could create issues as lines could blur with ownership and accountability. By working with one partner there would be one "point of contact" and a simple, streamlined operational model. One partner would more easily fit into the governance model for the State to focus on the goals and purpose on the portal. The State should develop a strong relationship with the partner that they trust and allow the partner certain flexibility in the operations of the portal.

6 ADDITIONAL COMPONENTS TO CONSIDER

We would like to provide additional components to consider for an internet portal RFP that were not inherent in the RFI:

- **Project Oversight/Executive Governance**: What would the structure of the portal management look like? Who are the stakeholders and what would their roles be?
- **PCI Compliance**: What is the current relationship with credit card/financial processing? Would there be a transition? Process definition for continued transactions, refunds, etc.
- **Legacy Retirement Plan**: What is the schedule for keeping and transitioning off the current technology? Plan for data migration and conversion.
- **Modernization Timeline**: What is the schedule for modernizing and developing new technology? Is the portal being updated with other programs/portfolios?

- **Compliance Specification**: State should be specific about what financial and security data compliance and regulation the vendor in developing the portal solution should adhere to or be aware of.

- **Ownership:** Provide specifics on current ownership and operations of the portal and if this will change with a new solution and vendor.

7 CONTACT INFORMATION

Corporate Headquarters: 427 Launiu Street, Suite 609, Honolulu, HI 96815

Deena Tearney | CEO and Managing Partner
Phone (808) 228-0581 | deena.tearney@PacificPointCorp.com

8 SALESFORCE CAPABILITY STATEMENT

***Disclaimer:* Salesforce is an innovative cloud services provider with constantly evolving technology. We have made a good faith effort to provide you with responses to your request that are accurate as of the date of the response and within our knowledge. Because Salesforce procedures and policies change from time to time and Salesforce continues to innovate by providing each customer multiple major release upgrades each year, we cannot guarantee that the answers to your request will remain the same over time. The rights and responsibilities of the parties with regard to your use of Salesforce's online software services shall be set forth solely in the applicable agreement executed by Salesforce. The responses here to your request shall not be part of a final contract.**

Salesforce Introduction & Overview

Salesforce is the enterprise cloud computing leader dedicated to helping companies and government agencies transform into connected organizations through social and mobile technologies. Since launching its first service in 2000, Salesforce's list of over 150,000 customers span nearly every industry worldwide.

Salesforce was incorporated in Delaware in February 1999, founded on the simple concept of delivering enterprise customer relationship management (CRM) applications via the Internet, or Cloud. Introducing their first service in February 2000, Salesforce initiated one of the most significant paradigm shifts in the computing industry by pioneering the revolutionary idea to deliver enterprise CRM as Software as a Service (SaaS). Salesforce has since expanded its service offerings with new editions, solutions, features, and Platform as a Service (PaaS) capabilities.

Salesforce service offerings are intuitive and easy-to-use, can be deployed rapidly, customized easily and integrated with other platforms and enterprise apps. Salesforce delivers solutions as a service via all the major Internet browsers and on leading mobile devices. Not only does Salesforce provide enterprise cloud apps, Salesforce also provides an enterprise cloud computing platform upon which Salesforce customers and partners build and customize their own apps.

Salesforce's vision is based on a multi-tenant technology architecture and a subscription service business model. Salesforce's metadata-driven, multi-tenant cloud runs on a single code base, which enables every customer to run their organization on the latest release without disruption. Because Salesforce deploys all upgrades on its servers, new features and functionality automatically become part of the Salesforce service on the upgrade release date and therefore benefit all Salesforce customers immediately. Salesforce continually provides these cloud computing technologies to enterprise customers around the world.

Salesforce is headquartered in the US with executive offices located at The Landmark @ One Market, Suite 300, San Francisco, California 94105. The principal Salesforce web address is http://www.salesforce.com/. Salesforce is publicly traded on the NYSE under stock symbol CRM. Additional detail is available at: http://www.salesforce.com/company/investor/quarterly-results/

Salesforce and Government

In addition to its commercial customers, the company's trusted Cloud platform is creating a connected experience for more than 1,000 government agencies, including all Federal cabinet agencies and 45 of the 50 US States.

With the world's leading cloud platform, Salesforce is freeing government data from legacy systems, empowering citizens, and connecting agencies to administer government in powerful new ways. Government agencies are using Salesforce solutions for a multitude of government functions, including case management, grants management, constituent communications and correspondence management, 311, call/contact center management, licensing, permitting and inspections, outreach programs, learning management, volunteer management, project/program management, and even donor management, among numerous others.

The FedRAMP-certified Salesforce Government Cloud gives agencies the trusted, secure platform they need to transform into modern, mobile, and responsive organizations. With Salesforce, government employees can connect with citizens anywhere and from any device.

Customer Success Platform

Today, Salesforce is helping Government strengthen the trust between their mission and every citizen, employee, and partner through the power of innovation with the Salesforce Customer Success Platform.

With Salesforce's Customer Success Platform – based on the Gartner top-rated Salesforce Enterprise Cloud for PaaS, SaaS, and Customer Engagement – there is no hardware or software to manage or maintain. The Salesforce FedRAMP certified Government Cloud runs a multi-tenant, single code-base, which allows agencies to take advantage of the continuous innovation introduced through the company's three times a year upgrades. These upgrades allow customers to take immediate advantage of the latest product features, security enhancements, and service capabilities.

Agencies are empowered to easily build on their inherent strengths to improve organizational visibility within and across their enterprise through solutions that help accelerate communications, drive closer collaboration, and enhance mission service delivery.

The Salesforce Platform has been designed to provide customers with high levels of performance, reliability, and security. Salesforce built and maintains a multi-tenant application architecture that has been designed to enable the service to scale reliably and cost-effectively to accommodate millions of users. The Salesforce cloud based architecture allows agencies to deploy solutions on the Salesforce Platform rapidly and scale at will for future needs.

1-1-1 Philanthropic Model

Salesforce.org encompasses the company's philanthropic mission.

Salesforce.org is a self-funded social enterprise providing best-in-class technology to social impact organizations. Using a "1-1-1 Model," Salesforce leverages 1% of its equity, 1% of its employee time, and 1% of its products to help communities in need.

Since its founding, *Salesforce.org* has given more than $128 million in grants, 1.6 million hours of volunteer community service, and product donations to more than 29,000 nonprofits and higher education institutions. Proceeds from the technology also support employee volunteerism, grant-making in the areas of STEM education, youth workforce development, and technology innovation.

Salesforce Advantage

Salesforce solutions leverage the company's experience as a leader and innovator in the Cloud services market. Salesforce continues to develop and improve its offerings in response to the collective needs of its customers.

Key advantages of Salesforce solutions include:

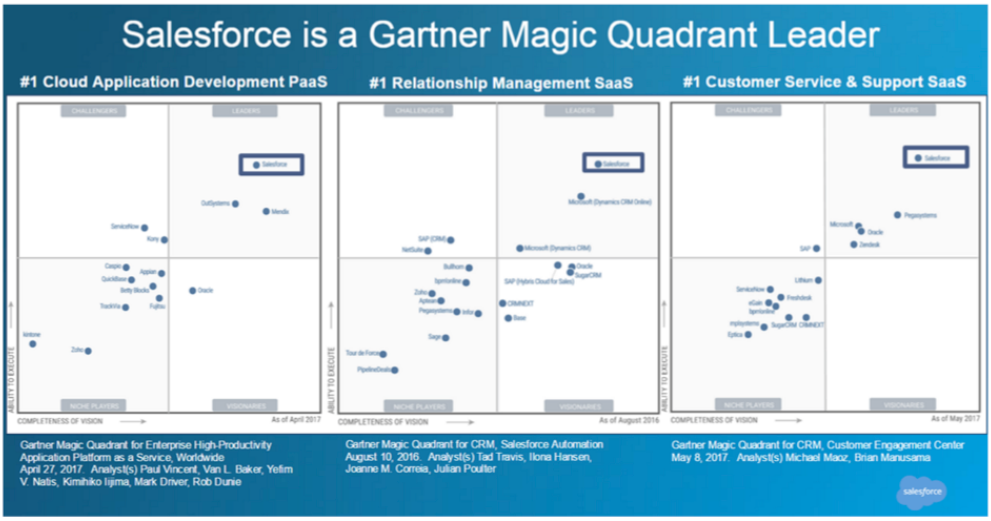
Secure, Private, Scalable, Reliable. The Salesforce service has been designed to provide customers with 100% trusted privacy with the highest levels of performance, reliability, and security. Salesforce has built, and continues to invest in, a comprehensive security infrastructure, including firewalls, intrusion detection systems, and encryption for transmissions over the Internet, which Salesforce monitors and tests on a regular basis. Salesforce built and maintains a multi-tenant application architecture that has been designed to enable the Salesforce service to scale securely, reliably and cost-effectively. The Salesforce multi-tenant application architecture maintains the integrity and separation of customer data while still permitting all customers to use the same application functionality simultaneously. With multi-tenancy, all Salesforce customers run their applications on a common infrastructure. This means that every customer is always on the latest release of Salesforce applications and has access to the latest technology. Multi-tenancy makes it is easier to scale new users and applications. With multi-tenancy, customers don't have to worry about managing infrastructure.

FedRAMP Certified SaaS/PaaS since 2014. One reason for Salesforce's success in the government arena is its investment in delivering a secure Cloud experience. The service is designed to provide Salesforce customers with privacy and high levels of performance, reliability, and security. Salesforce Cloud-based solutions (SaaS and PaaS) are FedRAMP certified at the Moderate Impact level to provide agencies with the assurance that their data is secure. As of May 2017, Salesforce holds 38 Federal ATOs based on the original FedRAMP ATO. All 38 Federal ATOs were granted after rigorous review and serve as an example of the robust Salesforce FedRAMP implementation, process, and operations. Salesforce has also received Provisional Authorizations (PA) from Defense Information Systems Agency (DISA) at Impact Level 2 (IL2) and Impact Level 4 (IL4), which is based on DISA's Cloud Computing Security Requirements Guide (SRG). With a Cloud-based application platform, agencies minimize internal administration while obtaining optimal organizational agility, speed-to-value, and ease-of-use for a broad range of stakeholders.

Salesforce: A Recognized Industry Leader

Gartner — Leader, Sales Force Automation, 2016	Gartner — Leader, CRM Customer Engagement Center, 2017	Gartner — Leader, Enterprise High-Productivity Application Platform as a Service, 2017
Fortune 500 — Fortune 500 Member	Forbes — "Innovator of the Decade" 2016; The World's Most Innovative Companies 2011-2017	Fortune 100 Best Companies to Work For — #8 Best Places to Work in 2017
CRM Magazine 2017 Service Awards — 2017 Winner: Customer Case Management and Contact Center Search	Fortune World's Most Admired Companies — 2017 Named #20 Most Admired Company in the World	LinkedIn — Top 5 Company 2017
Glassdoor Best Places to Work — #17 Best Places to Work, 2017	Forrester — Leader, Customer Service Solutions For Midsize Teams, Q4 2015	Forrester — A Leader, Low-Code Development Platforms, Q2 2016

Market Leadership, Continuous Innovation, and No Cost for Upgrades. Salesforce was named one of the World's Most Innovative Companies by *Forbes Magazine* for the last seven years in a row (2011 through 2017). Salesforce is #1 in Enterprise Cloud Computing and #1 in CRM according to IDC (International Data Corporation). Salesforce ranks as the Leader in the Gartner Magic Quadrant for "CRM Customer Engagement Centers" (SaaS), "Sales Force Automation" (SaaS), and "Enterprise High-Productivity Application Platform as a Service" (PaaS). More than 150,000 customers have successfully transformed their operations, including more than 1,000 government agencies. Customer examples include GSA, USDA, USAID, USPS, CMS, DOI, State of Texas, State of Colorado, State of California, and others. Agencies receive three complimentary, seamless, and automatic major release upgrades per year with no impact to workflow, integrations, reporting, or customizations.



AppExchange and Private AppExchange. Developed over 10 years ago, the Salesforce AppExchange is a community of over 3,200 pre-built enterprise Cloud computing solutions that are integrated with Salesforce's SaaS/PaaS solutions and developed on the Salesforce Platform by third parties. To date these solutions have been utilized more than 3 million times by our customer community. With just a mouse click and a Salesforce account, agencies can extend their initial investment and easily find, test drive, and install hundreds of pre-integrated apps from the Salesforce partner community. With the Salesforce Private AppExchange offering, an agency can create a secure, customized, branded application store location to host customized apps for distribution across users. With role-based access, an agency's users will have instant access to any mobile or cloud application they need to be productive on any device. Visit the public Salesforce application store at https://appexchange.salesforce.com/ to see the navigation and UI, or view the Salesforce AppExchange demo.

Ease of Use: Declarative Configuration and Development. The Salesforce Platform offers a core set of technologies that not only power the Salesforce SaaS products but also allow agencies to build custom apps, connect data from any system, and manage it from anywhere. The Salesforce Platform allows customers to quickly build desktop and mobile apps with just a few clicks, all from a single canvas.

The Salesforce Platform has received top ratings from Gartner, Forrester, and Info-Tech Research. To help IT deliver apps faster, the Salesforce Platform offers a simple yet powerful set of declarative, point-and-click tools that anyone can use to achieve business goals at lightning speed. Without writing code, developers and business users alike can quickly and easily create custom Salesforce Platform apps with complex business logic and beautiful user interfaces designed specific to every screen.

Salesforce Lightning Builder tools allow agencies to work in alignment with agile development methodologies to meet business demands faster. The Platform uses open APIs based on industry standards such as REST and SOAP to make it easy for agencies to build apps that integrate with legacy systems. For more complex apps, developers can leverage the Apex programming language. Apex is an object-oriented, on-demand language. It is like Java, with similar syntax and notation, and is strongly

typed, compiled on demand, and fully integrated into the Platform. All application services come right out of the box, from a powerful workflow engine to API services, integration services, authentication, event log framework, analytics, and collaboration.

Mobile First, Mobile Everything. Salesforce's packaged apps are mobile-enabled out of the box and can be accessed from any mobile device, anywhere at any time. Agencies can enable mobile access to any/all applications and data that reside on the Salesforce1 Mobile Platform. Internal users experience a consistent UI across a variety of mobile devices, including iOS and Android smartphones and tablets. The Salesforce Mobile SDK allows agency customers to build fully customized mobile apps to meet existing and future needs.

High Levels of User Adoption. Salesforce has designed its solutions to be intuitive and easy to use. Salesforce solutions contain many tools and features of popular consumer web services, so users are immediately more familiar with the Salesforce UI than typical enterprise apps. As a result, users can often use and gain benefit from their solutions with minimal training.

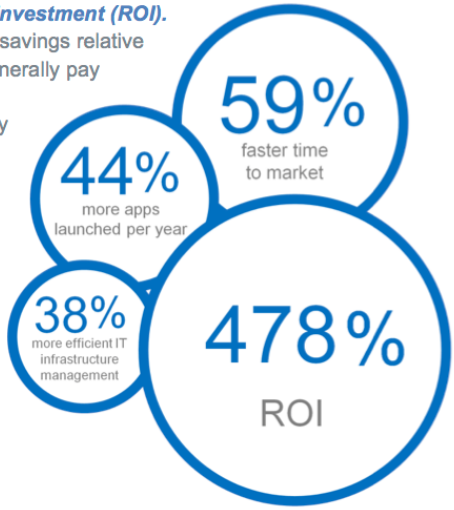
Collaboration Embedded into all Aspects of the Solution. Collaboration is critical to organizational effectiveness and productivity. Numerous standard collaboration capabilities are embedded into the fabric of how users work within the system; a complete audit trail tracks user efforts across unstructured communications, reports, dashboards, triggered alerts, document management, universal search, knowledge management, mobility, and much more.

Rapid Development of Apps using the Salesforce Platform. Salesforce's multi-tenant platform allows customers and third-party developers to develop apps rapidly. Salesforce provides the capability for business users to easily customize Salesforce applications to suit their specific needs. Programming language support also is built in, so developers can create complex apps spanning multiple business processes for multiple mobile devices.

Accelerated Time to Value. Salesforce's trusted Cloud platform allows customers to deploy applications that achieve a 59% accelerated time to value, implementing solutions in weeks and months vs. months or years compared to traditional, on-premise system implementations (according to IDC). With Cloud architecture already in place, customers need not spend time or money procuring, installing, or maintaining servers, storage, networking equipment, security products, or other infrastructure hardware and software.

Ease of Integration. IT professionals are able to integrate and configure Salesforce solutions with existing applications quickly and seamlessly. Salesforce provides a set of application programming interfaces (APIs) that enable customers and independent software developers to both integrate Salesforce solutions with existing third-party, custom, and legacy apps and write their own application services that integrate with Salesforce solutions. For example, many Salesforce customers use the Salesforce API to periodically move customer-related data from custom-developed and packaged applications into the Salesforce service to provide greater visibility into their activities.

Lower Total Cost of Ownership and Dramatic Return on Investment (ROI). Salesforce enables customers to achieve significant up-front savings relative to the traditional enterprise software model. Because they generally pay for the service on a per subscriber basis for the term of the subscription contract, customers benefit from the predictability of their future costs. In addition, Salesforce deploys all upgrades on Salesforce servers, so new features and functionality automatically become part of the Salesforce service (on the upgrade release date), benefitting all Salesforce customers immediately.



Independent studies conducted by leading industry analysts such as Gartner, Forrester, and IDC show the cost-effectiveness and the large ROI potential of the Salesforce Platform. In IDC's study published in July 2016, the following key Business Value results were cited:

- 478% five-year ROI
- Seven-month breakeven point
- $242,272 in business benefits per 100 users per year
- 50% faster application development lifecycle
- 59% less time to release new application or feature
- $55,100 of additional revenue per year per 100 users
- 38% more efficient IT infrastructure management
- 44% more new apps developed per year

View IDC Report for more information and complete details.

Products vs. Solutions

More than just products, Salesforce's primary objective is to deliver solutions that help customers achieve goals and become customer-based, connected organizations. Salesforce delivers highly flexible solutions that fit in a modern world of rapidly changing technology, expanding social networks, and growing customer demand.

Salesforce believes the shift to cloud applications provides significant benefits, even beyond those associated with multi-tenant infrastructure. Organizations are able to realize many of the benefits offered by traditional enterprise software vendors (e.g., a comprehensive set of features and functionality, the ability to customize and integrate with other applications) while at the same time reducing the risks and lowering the total costs associated with owning enterprise software.

Salesforce has more customers, subscribers, market share, and applications than any other on-demand vendor. This leadership translates into a higher investment in the Salesforce platform and applications, which in turn, effectively accelerates the growth and market share differential of the company.

Products and solutions are delivered via the web by a subscription-based model. Implementation services and staffing of Salesforce products/solutions are provided by a large ecosystem of Salesforce certified system integration partners.

Salesforce Products

A high-level summary of Salesforce's core Cloud products appears in the accompanying table:

Core Product	Description
salesforce app cloud	App Cloud, Salesforce's world leading, trusted Cloud application development platform (platform-as-a-service, "PaaS"), allows agencies and partners to build applications that achieve a 59% accelerated time to value compared to traditional, on-premise system implementations (according to IDC). Ranked as the #1 Cloud platform by IDC, Forrester, and Gartner, the Salesforce Platform has dramatically changed how all levels of government builds, runs, and uses applications. Governments are moving away from the time, cost, complexity, and frustration associated with hardware, software, and backlog for traditional, on-premise solution models. The Salesforce App Cloud (Salesforce Platform) is a one-stop shop for building, running, managing, and optimizing apps: • *Build customer experiences*. App Cloud has everything necessary to build beautiful, engaging apps that transform the customer experience. • *Build mobile apps*. Build mobile apps that integrate customer data for richer, more engaging customer experiences. • *Automate business processes*. Quickly build mobile apps for automating business processes, collaborating, connecting, and increasing productivity. • *Connect & integrate*. Unlock the back office. Extend and connect with powerful APIs. Connect any external data source, including on-premises systems. • *Speed and Agility*. Every employee can build fast with clicks or code. • *Trusted and Connected Platform*. Run all apps on a trusted platform. The Salesforce Platform enables agencies to build, integrate, and deploy any type of government app, for any need, from personal productivity apps (email, calendar, and spreadsheets) to full-blown enterprise apps for policy and program, project management, customer service, budget and finance, and much more. The flexible underlying Salesforce Platform and supporting ecosystem allows organizations to integrate to almost anything and to adapt their solution to precisely fit their specific needs, all while meeting government's high-priority security requirements. Salesforce's trusted cloud application development PaaS allows customers and partners to "generate new, higher-quality custom business applications faster (weeks versus months) and with fewer resources," per an IDC Study. *Make any App Mobile, Anytime, Anywhere, Any Device*. All applications on the Salesforce Cloud platform can be accessed via any device, from mobile devices to PCs and Macs, with a browser and Internet connection. The

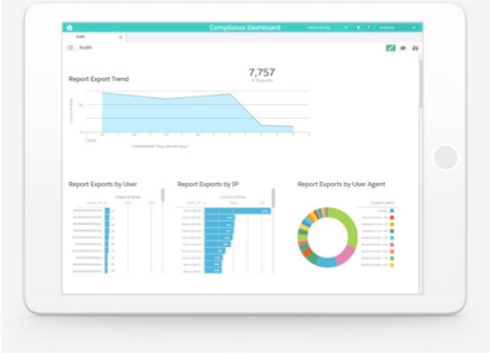
Core Product	Description
	Salesforce1 Mobile App, built on the Salesforce Platform, provides users with a completely unified mobile experience across iOS and Android smartphones and tablets. It supports native, HTML5, and hybrid application development. Salesforce1 Mobile allows users to access Salesforce solutions from anywhere and with all of the solutions' customizations, configurations, settings, and data. Salesforce1 Mobile App can be instantly distributed to mobile users each time a new app is created – with no deployment headaches. With the power of the platform, administrators can build applications on the desktop and then mobile-enable them with just a few clicks. From custom tabs and configurations to Salesforce pages and more, Salesforce customers can tailor mobile deployments for individual users or groups so that everyone is ultra-productive, no matter where they are located. Mobile enables customers to develop and run mobile and desktop apps on a single cloud computing platform, create customized mobile profiles that are specific to a user or group's needs, and push customizations over the air automatically so users never have to sync devices. *Automate Business Processes*. The Salesforce Platform makes it easy for businesses to innovate and automate their processes while leaving IT to manage risk and security (Salesforce maintains all infrastructure, servers, or databases). Business analysts and non-professional developers can build apps with drag-and-drop tools, without the need for deep programming skills. Wizards, forms, and check-box selections automatically generate user interfaces, templates, and pre-built components, all without complex code. Building apps on the Salesforce Platform means all data can be shared with real-time, built-in reports and dashboards. *Unlock Back-Office Data*. Salesforce allows customers to build modern apps without complex and expensive legacy customizations, allowing much faster time to market. Integrate with SAP, Oracle, and other back-office data; create mobile and social apps; collaborate around live data feeds and real-time reports and dashboards; and lower implementation costs and time to market by orders of magnitude. View Demo: Salesforce Platform Demo
salesforce appexchange	The Salesforce AppExchange is a directory of more than 3,200 pre-built enterprise cloud computing applications that are integrated with Salesforce's CRM service and developed on the Salesforce Force.com platform by third parties. The AppExchange is the World's Leading Enterprise App Marketplace and one-stop shop for cloud computing applications and services. With just a mouse and a Salesforce Force.com account, customers can extend their initial investment and easily find, test drive, and install hundreds of pre-integrated applications from the Salesforce partner community. *Salesforce Private AppExchange*. With the Salesforce Private AppExchange offering, customers can create one secure, customized, branded app store location to host customized apps and distribute apps across users. With role based access, users will have instant access to any mobile or cloud app they need to be productive, on any device. Customers can create app categories by role, function, and more. Salesforce provides tools that will allow

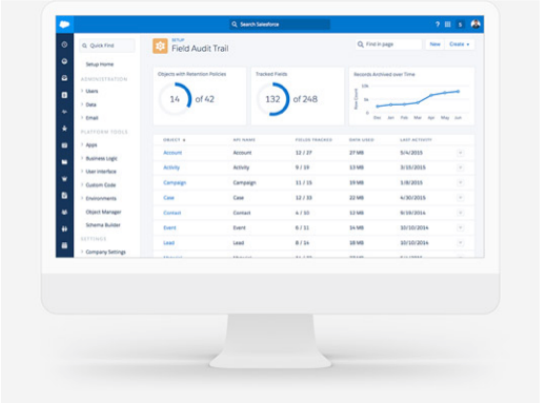
Core Product	Description
	customers the flexibility to design the user experience. Customers can brand their store - name the store, set up logos, and customize banners. You can create categories to control how applications display, whether by language, business function, or even across applications. Global search allows users to easily find the particular application they are looking for. To view navigation and UI, go to the public Salesforce app store, at: https://appexchange.salesforce.com/. View Demo: Salesforce Private AppExchange Demo
salesforce sales cloud	Sales Cloud is Salesforce's flagship CRM product. By pioneering the concept of cloud computing, Salesforce showed that applications could be delivered over the Internet in the same way electricity is carried into our homes. With open architecture and automatic updates, Sales Cloud does away with hidden costs and drawn-out implementations of traditional CRM software. Across federal, state and local Government today, Salesforce has deployed many large-scale CRM applications for mission-critical programs, and these deployments have been completed in as little as 8-12 weeks. View Demo: Salesforce Sales Cloud Demo
salesforce service cloud	With the Service Cloud, service and support personnel can achieve more 1st call resolutions, better maintain SLAs and increase customer satisfaction ratings at a fraction of the cost. Government agencies can collect customer support requests from all channels, automate routine processes, and open up knowledge base and FAQ's help via their Web site. Salesforce's powerful analytics engine can also deliver key performance metrics tailored to government organizations fast, without the need for code or IT resources. Used in call centers across federal and state and local governments, Salesforce helps deliver great service with 40% improved agent productivity, 35% decrease in support costs, 37% faster case resolution, and 37% increased customer satisfaction. View Demo: Salesforce Service Cloud Demo
salesforce chatter	Collaboration is the linchpin in any socially connected organization. More than just another social network layered on top of an organization's business practices, Chatter makes all critical business data alive and actionable. With Chatter, which is built on the Salesforce platform, users can create custom actions, deploy instantly to any device, and access any app with a click. View Demo: Salesforce Chatter Demo
salesforce identity	Maintain a single, trusted identity across the entire user network and improve usability and adoption with Salesforce Identity. With single sign-on for users, administration is simplified through centralization and automation of user identity and access rights. Centrally manage apps, users, and data sharing for all enterprise Cloud and mobile apps with the simplicity, transparency, and trust of the world's #1 Cloud platform. Salesforce can act either as a Service Provider (SSO via SAML, delegated authority, or with authentication providers) or as an Identity Provider (via SAML) as part of a federated identity management environment. Salesforce also provides Salesforce Identity Connect, which is a native connector to Active Directory. View Demo: Salesforce Identity Demo

Core Product	Description
salesforce community cloud	*Create a Company Community or Social Intranet/Employee Social Network*. A Company Community is a social intranet that helps organization transform culture, tear down walls, and be more productive by allowing employees to collaborate on any device, contribute knowledge, use apps, and engage fellow employees. The Salesforce Platform has built-in social capabilities at its core. It allows dynamic content pages, integrates third-party applications, and is all managed in the Cloud with single sign-on. A Company Community on the Salesforce Platform makes it easy to innovate and increase productivity and culture through a tailored social intranet that matches the agency's branding and culture, flattens the organization, breaks down silos, and drives collaboration and engagement. Company Communities are also mobile on any device. *Solve Service Requests Faster with Customer Communities*. With a Customer Community, customers can help each other, access the agency's knowledge base, log service requests, and get help from an agent when needed. The Salesforce Customer Communities portal is a straightforward, intuitive front-end user interface and experience. The community portal can be easily branded to match an agency's look and feel, creating a highly tailored self-service experience that includes customer-to-agent and customer-to-customer collaboration and feedback forum capabilities. Customer Communities portal branding options include page layouts, HTML header and footer, color, and fonts. Agencies can create customized case submission forms that can be exposed on the Customer Communities portal or added as fields to reports and dashboards via an intuitive, drag-and-drop report builder. *Create Private Branded Partner Communities*. Agencies can also easily create private, branded partner communities to instantly connect, share, update, and synchronize accounts, contacts, activities, cases, and custom objects with government partners. With partners that already use Salesforce, connecting couldn't be easier. View Demo: Salesforce Community Cloud Demo
salesforce marketing cloud	Marketing Cloud, built on the highly scalable and flexible multi-tenant Salesforce Platform, provides digital marketing solutions for organizations of all sizes through a suite of integrated applications that power real-time marketing and engagement across email, mobile, social media, and the web. Marketing Cloud is the only platform today that provides a single platform for all digital marketing needs. It brings the best products together. At the core of Marketing Cloud is data. The Salesforce platform enables organizations to integrate and aggregate data from any conceivable source — Salesforce contact records, service cases, web analytics data, e-commerce purchase history — to form a single view of the customer. Those insights then drive relevant and highly personalized communications. With the trusted infrastructure of Salesforce Marketing Cloud's secure and highly available platform, agencies have flexibility and reliability to empower them to:

Core Product	Description
	• Multi-year trending analysis, supporting query and processing of hundreds of millions of rows of data from various sources • Cross-object analysis and faceting • Rich data visualization • Dynamic self-service exploration Wave Analytics is mobile-ready and allows immediate collaboration and sharing of insights with team members right inside Salesforce. With Wave Analytics, agencies can quickly query and explore data across CRM, ERP, Excel, and social and mobile applications to get exactly the information needed without the limitations of a pre-built report. Unlike legacy Business Intelligence or desktop discovery tools, Wave Analytics is built native in the Cloud, providing the advantage of massive scale and taking only weeks to get up and running. Every organization's data is secure. Powerful field level security and role-based hierarchy controls ensure the right people have the right answers. *Salesforce Service Wave.* With Service Wave, agencies can create smarter managers, more productive representatives, and happier customers. Service Wave is the first service analytics application built by Salesforce. Built for Service Cloud, Service Wave empowers the entire service team with the insights needed to drive efficiency, deliver personalized customer service, and delight citizen customers. Wave also enables service agents to obtain an instant 360-degree view of customers while simultaneously gaining visibility into historical cases, benchmarks, and CSAT scores. The Action Framework and dashboards embedded in the Lightning Service Console ensure that service managers and agents can take action right in Salesforce at the point of insight. *For Service Managers*: *Team KPIs.* Team performance, service center efficiency, channel optimization, and CSAT, all in one place. Service agents get a 360-degree customer view to ensure smarter service and peer benchmarking so they can measure their efforts. *Benchmarking.* Compare individual agents vs. high performers and analyze each customer vs. all customers. *Historical Analysis.* Use historical analysis to track trends over time, understand best practices, and drive adoption. *Native Integration.* Native integration with Service Cloud means you can instantly populate dashboards with relevant service data and embed them in the Lightning Service Console so your agents can make more informed decisions.

Core Product	Description
	For Service Agents: *Agent KPIs*, embedded in context. A complete view into cases, CSAT, and more with embedded dashboards in the Lightning Service Console. *Customer 360.* Customer and case context to deliver the right service, on the right channel, at the right time. *Instant Actionability.* Collaborate, create, and update Service Cloud cases from the point of insight. With Service Wave, agents and managers can open and close cases from the point of insight, and do it on any device without shifting between disconnected analytics tools. They can quickly create tasks, update records, and collaborate for faster resolutions and happier customers. *Historical Analysis.* Track trends and benchmark against similar case averages and top performers. View Demo: Salesforce Wave Analytics Demo View White Paper: Wave, the New Architecture of Business Intelligence With Salesforce Wave Analytics, Salesforce is currently the only Cloud service provider that holds a FedRAMP ATO for a Business Intelligence analytics solution.
salesforce shield	Salesforce Shield protects your enterprise with point-and-click tools that enhance trust, transparency, compliance, and governance across all of your business-critical apps. Salesforce Shield is comprised of the following three bundled products that can be purchased together or separately: *Platform Encryption.* Salesforce Platform Encryption sets up in minutes, with no additional hardware or software, and uses native strong, standards-based encryption. Platform Encryption provides an extra layer to Salesforce's security while enabling customers to enjoy business critical Platform features, such as search, workflow, and validation rules. Your Agency can use Platform Encryption so that Your Agency's organization can confidently prove compliance with privacy policies, regulatory requirements, and contractual obligations for handling private data. Platform Encryption offers native platform encryption and key management features. Your Agency's data is encrypted at rest using a hardware security module-based key derivation system. These features allow Your Agency to protect data at a more granular level than Classic Encryption while still giving

Core Product	Description
	users the ability to perform necessary tasks. Your Agency can: - Encrypt files and attachments (including email attachments). - Encrypt certain standard and custom fields. - Encrypt Knowledge article fields and attachments - Use an advanced key management system. Platform Encryption helps address some concerns about protecting confidential information. It prevents sensitive data from residing in clear, decipherable form and allows you to manage your tenant secrets, which are used to derive the keys that protect your data. Salesforce is committed to high security standards and offers multiple data encryption options. Customers who want to adopt or extend their use of Salesforce can consider using Platform Encryption to comply with various standards. The Platform Encryption Bring Your Own Key (BYOK) service gives you the option to generate and manage your own tenant secrets outside Salesforce, for added control and flexibility. With the BYOK service, you have two options to manage your encryption key life cycle: use the built-in Salesforce key management infrastructure or use your own cryptographic resources to generate tenant secrets and share them individually with Salesforce. Additional details are provided in the Salesforce Platform Encryption white paper. *Event Monitoring.* In addition to Salesforce's core auditing capabilities, your Agency can use event monitoring to discover how often and at what times your users are logging into and out of your organization. This includes insight into what Salesforce applications are being adopted by users, who is logging in and from where, what pages users are viewing, what reports users are running and exporting and other aspects of application usage.  This capability helps you discriminate between valid and invalid login requests and also track user login patterns for future reference. Not only can your Agency now better understand how your apps are being utilized, you can also monitor if users download large amounts of data that might put your Agency at risk. In addition, your Agency can also determine if an employee is unnecessarily downloading sensitive customer/citizen information, pinpointing the exact time and location of that event. Event Monitoring is

Core Product	Description
	delivered as an API-first feature and there are Salesforce partners with visualization tools available. View more information in the Event Monitoring data sheet. *Field Audit Trail.* Organization's desire certainty that their data is accurate, complete and reliable, enabling them to meet stringent industry regulations. With Field Audit Trail, your Agency can track changes at the field level for up to 10 years and set different policies for each Salesforce object to ensure data is purged when no longer needed.  View more information in the Field Audit Trail data sheet.
salesforce data.com	With Data.com, agencies can keep accounts and contacts up-to-date by matching the CRM against the leading source of data, Data.com. Data.com manages business information and data services by uniquely leveraging user-generated and Dun and Bradstreet (D&B) data. Agencies can define criteria to identify contacts and bring them directly into Salesforce in an automated fashion. They can target by various criteria, including industry, titles, etc. All of Data.com's contacts are constantly added and updated by the large user community and data from D&B. Every record is complete with Name, Title, Company, Email, Phone (70% direct dial), and Address. Each night, Data.com compares agency data to the Salesforce database and flags or updates agency records based on the selected criteria, eliminating both the time and money spent on dead, duplicate, incorrect, and incomplete records and the hassle of having to manually manage data. Finally, easy reporting shows how many records are under management, how many have been cleaned, and how many new records have been added.

Salesforce Solutions for Government

The rise of the connected customer has reset expectations for interaction with government. Your agency can support the needs of today's connected citizens by improving engagement, building trust, and driving lightning-fast innovation. Salesforce provides departments and agencies with modern tools that empower teams that are more responsive and capable of delivering a more impactful mission.

A summary of the Salesforce portfolio of solutions for government is presented below:

Solution	Description
Federal	
Federal Contact Center	The Salesforce Federal Contact Center is a secure, multi-channel enterprise application that puts the customer experience at the center of all agency services, knowledge, and experts. With the Salesforce Federal Contact Center solution, government agencies have improved service levels, optimized mission activities, and increased the overall level of efficiency within their organizations. The result is a more streamlined intake process and effective mission execution. Learn more here.
Federal Case Management Solution	Federal Case Management is a secure and flexible enterprise platform that supports the full case management cycle by bringing together all relevant information, from any source, into one connected experience. Learn more here.
Government Cloud Wave	Government Cloud Wave is the analytics extension for Salesforce's Government Cloud solutions. FedRAMP approved, it creates a comprehensive view of all information relevant to a given case across main and periphery systems. Providing every Salesforce user with the modern, mobile, analytical functionality they need to identify patterns, resolve issues, and advance agency mission helps teams better understand the reasons behind case backlogs, assign more actionable workloads, and anticipate clearer impact. Learn more here.
Facilities Management Solution	Schedule, execute, and track preventive maintenance to reduce unexpected failures. Give staff an easy way to report new issues and streamline resolution. Learn more here.
Cloud App Development	Build agile, custom apps fast with drag-and-drop UI. Connect legacy systems with standard APIs. Deploy on any device with embedded workflow and logic. Learn more here.
Department of Defense	
Innovation Management Solution	Salesforce Innovation Management automates the collaboration between the Department of Defense and industry. Working together on a single platform creates scalable, cost effective, and mission-critical defense products. Learn more here.
Recruiting Solution	Develop a system of engagement that leverages existing records. Generate leads, process candidates, and manage the recruiting

Solution	Description
	lifecycle process, and do it all faster. Learn more here.
Government Contractors	
GovCon Capture Solution	Generate pipeline with Salesforce GovCon Capture, a fully integrated and configurable opportunity lifecycle management solution. Learn more here.
Program Service & Maintenance Solution	Deliver personalized, timely service requests for your government customers. Learn more here.
Employee Engagement Solution	Transform employee engagement by giving them a single, easy-to-use platform to connect with colleagues, increase their productivity, and more. Learn more here.
Government Cloud Wave Solution	Give employees the modern, mobile, self-service analytical tools they need to develop data-driven strategies and strengthen partnership in government missions. Learn more here.
City / State	
State Contact Center	Increase agent productivity, improve customer experience, and lower the cost of service delivery by bringing together all relevant information — from any source — into one connected experience. Learn more here.
Workforce Development Solution	Empower job-seekers, employers, staff, and stakeholders to succeed with the Salesforce workforce CRM, workflow, and reporting solution. Learn more here.
Government HHS Case Management Solution	Provide Health and Human Services agencies with better tools so they can deliver social services more efficiently and become more client-focused to meet rising demands. Create and monitor case details across all mission partners. Automate workflow rules, align resources, and empower staff to work smarter as a team. Learn more here.
Licensing for Government Solution	Connect licensees, businesses, and government to secure quality professional services to assure the safety and economic prosperity of a community. Learn more here.
Engagement Center Solution	Integrate web, phone, and mobile app inquiries on a social-ready platform. Give users a single, consistent, functional, experience with no paperwork required. Learn more here.
Government Cloud Wave Solution	Give knowledge workers the modern, mobile, self-service analytical tools they need to identify questions, resolve issues, and advance the agency's mission. Learn more here.
Case Management Solution	Support the full case management cycle by offering a single connected experience for citizens and employees. Learn more here.

Customer Success Stories

In the public sector, Salesforce's trusted Cloud platform and applications help government employees and agencies collaborate easily and connect with partners and constituents like never before. Federal, state, and local government agencies are rapidly adopting Salesforce because it's Cloud computing solutions are faster to deploy and typically less expensive than most on-premise solutions. Moreover, Salesforce solutions dramatically boost productivity, foster innovation, and promote constructive collaboration – all while addressing high-priority security requirements that are specific to government organizations.

With the world's leading platform, Salesforce is freeing government data from legacy systems and unleashing staff, partners, and citizens to administer government in powerful new ways.

The following sampling of relevant Salesforce government customer experiences demonstrate the innovative uses of the Salesforce Platform and solutions to deliver higher quality, more efficient, and more connected experiences.

U.S. State Department Bureau of Consular Affairs developed a custom support services solution called Atlas to assist in the management and delivery of overseas Consular Support Services. Atlas supports agency efforts to migrate from paper-based services to web-based, online processes by offering self-service appointment scheduling for applicants and the ability to use e-mail to collect supporting documentation, which is then permanently stored with an applicant's record. Atlas also reduces informational transactions for posts, enabling staff to focus on the adjudication of visas. A foreign immigrant goes to a Consular Affairs website to complete visa and personal background information. This submission triggers a workflow that assigns a caseworker to track the applicant through the entire application process. Throughout the process, data and information on the visa application case is tracked, updated, and reported against. The process end step involves the workflow-driven scheduling of an

interview, recording of that interview, and file case disposition, which results in either the issuing of the Visa or a denial and restart of the process. Real-time reporting of all activity helps manage thousands of applicants every month and adheres to required SLAs. Real-time visibility, tracking, and transparency for the entire visa application process is provided to the Department of State through custom reports and dashboards tailored for each mission. Atlas is currently *supporting 60 countries* across *five continents* in *35 languages*.

U.S. Department of Homeland Security (DHS), Federal Emergency Management Agency (FEMA) Tech Hazards Division (THD) was pressed to modernize its legacy exercise systems because of security reasons, age, functionality, desire for an improved UI and modern mobile capabilities, and an expiring Authority to Operate. After gathering requirements, there was a two-month development and test period using Salesforce's PaaS. The preliminary results were so impressive that THD decided to modify its requirements to accommodate FEMA's National Preparedness System's Core Capabilities. The Development Team work closely with an internal subject matter expert and devised a module that translated the legacy's exercise criteria into core capabilities. This major modification enabled THD to use the new tool to evaluate a biennial national level exercise (e.g., Southern Exposure) in July 2015. This was a huge success. The THD team has since been able to modernize and consolidate its core exercise systems, retire the old legacy systems, and implement an enhancement that will move the organization forward. Using the Salesforce PaaS toolset, THD has been able to completely modernize its core business system (including a major unforeseen enhancement) while staying within the development budget, saving significant Operations and Maintenance costs (O&M), and staying ahead of schedule.

U.S. General Services Administration (GSA) is the federal landlord managing 370 million sq ft of office space, the primary acquisition agency responsible for more than $62 billion in contracts, and a service center – both for government agencies and the public. GSA implemented a number of solutions to better integrate its legacy infrastructure with wall-to-wall access to Salesforce CRM, Service Cloud, Salesforce Platform, and collaboration solutions. The GSA consolidated 1,700 legacy apps to 15, built more than 25 apps in less than six months (and has now built over 100 apps), including CRM, case management, customer service, and geospatial apps; and led a Great Ideas Hunt that led to 635 ideas, 20,000 votes, $5.5 million per year in savings. GSA is also managing the National Contact Center, a Salesforce service center solution that handles more than 1.8 million annual calls. By deploying over 100 applications on the Salesforce platform, *GSA has experienced a 75% decrease in development time per application and a TCO reduction of up to 90% per application*. This transformation is saving GSA millions of dollars while allowing the agency to keep pace with ever-changing demands and customer needs. *View Customer Story*

The US GSA has experienced a 75% decrease in development time per application and a TCO reduction of up to 90% per application.

U.S. Department of Commerce, International Trade Administration (ITA)'s existing legacy CRM system was suffering from poor performance, substandard usability, and costly maintenance. ITA was unable to adapt quickly to changing business requirements, hampering agency effectiveness. ITA is currently implementing Salesforce to support its Global Markets, Industry and Analysis, and Trade

Enforcement units. Salesforce tracks interactions with U.S. industry and foreign market participants, manages trade promotion campaigns, and reports on key trade performance measures. ITA has also adopted Salesforce's Data.com solution to maintain data quality and enrich account and contact records with information from Dun and Bradstreet's rich repository of global company attribute data. This capability is tightly integrated into the core Salesforce CRM platform. ITA is also supporting an instance of Salesforce used by the Office of the Secretary (OS) of the Department of Commerce. OS was implemented in less than three weeks and is using Salesforce to capture interactions with dignitaries and industry contacts and to support official scheduling. With Salesforce, ITA will benefit from instant scalability, proven performance, mobility, visibility, ease of use, reduction in operation costs, improved workflow and case management, high-quality data, and collaboration among staff and customers. Additionally, ITA will be able to manage campaigns to track lead flow and outreach effectiveness.

U.S. Postal Service (USPS) was using an existing legacy CRM system which suffered from poor performance, low adoption, difficult usability, and costly maintenance. USPS was unable to adapt quickly to changing business requirements, hampering sales effectiveness and revenue visibility. USPS is using Salesforce to manage its national sales and customer service teams that support business customers and prospects. Salesforce is used to track accounts, contacts, opportunities, and interactions among more than 2,000 sales and service users. USPS is also using Salesforce Communities to enhance service delivery and interaction for its most strategic, high-value customers. USPS implemented Salesforce in a little more than nine months, which was a significant improvement over other projects of similar size and complexity, and the agency immediately began to experience benefits of *improved adoption, better data quality, and collaboration* among staff.

Implemented in a little more than nine months, Salesforce CRM brought the USPS immediate benefits of improved adoption, better data quality, and collaboration among staff.

U.S. Centers for Disease Control and Prevention (CDC) works 24/7 keeping America safe from health, safety, and security threats, both foreign and domestic. Using Salesforce Service Cloud, CDC combined more than 75 CDC programs (40 hotlines) into a single integrated CDC-INFO contact center. The contact center provides multi-channel information to the general public on over 750 topics, supporting CDC's mission by improving communication to protect America from national and international health, safety, and security threats.

U.S. Department of Agriculture (USDA) is using the Salesforce Platform in a number of capacities across its enterprise, including licensing and other mission-critical functions. USDA started using Salesforce in its Departmental Management division, which provides budget and fiscal management, human resource, procurement, and information technology support to mission areas so they can serve customers more effectively and efficiently. The challenge USDA faced was aging hardware, out-of-date software, and limited ability to support the business with modern applications, workflow, digital signatures, and reporting. USDA looked to Salesforce to solve these challenges and deployed Operational System for Customer Access and Requests (OSCAR) on the Salesforce Platform to manage various services across multiple USDA facilities. OSCAR enables Master Data Management, information sharing, reporting, and dashboards. The cloud-based system *achieves U.S. Office of Management and Budget's Cloud first policy* and USDA Secretary's Streamlining efforts. Everything in OSCAR *automatically runs on*

iPads, iPhones, Android, and other smart devices, which gives USDA the ability to be proactive versus reactive and to make requests for service instantly. OSCAR has enabled USDA Departmental Management to transform its customer engagement model; it offers a consolidated customer relationship map at Agency, individual user and asset level.

U.S. State Department NDF used the Salesforce Platform to create a budget management application. The results of development include improved technology management, increased productivity, lower costs, *annual ROI of 216%, and average annual savings of $1.6 million*. *View Case Study*.

U.S. Army recruitment is being transformed through social engagement. The Army's ability to effectively recruit the next generation of soldiers directly impacts its ability to protect the nation. People in the military are so diverse, come from so many different backgrounds, and receive information from so many different sources. It had become increasingly difficult to recruit in a rapidly changing communications environment. In addition, the Army's recruiters were using outdated recruitment methods (like brochures) that were not working for more digital generations. The Army needed to modernize its efforts, but the 10-year-old legacy system did not address current needs and requirements. The Army now uses the Salesforce platform to more efficiently track all of its recruiting functions in real time. The CRM system tracks personal and electronic engagements with prospects and helps recruiting staff manage the recruiting process. Social marketing engagement integrates directly with email, Facebook, and Google Maps mash-ups, which helps potential recruits learn about the Army through the sharing of current soldiers' stories. In turn, this helps them make informed decisions about enlisting. More detailed and real-time information helps recruiters work more efficiently by focusing on prospects most likely to join the military. People at the center can register by entering some basic demographic and contact information. By knowing a person's age, education, and whether the parents of the registering person have ever served in the military, recruiters begin to get an idea of a visitor's interest. Using Salesforce's mobile solution, Army recruiters can access recruit information, anytime, anywhere, and on any device.

With Salesforce, the U.S. State Department NDF experienced increased productivity, lowered costs, annual ROI of 216%, and average annual savings of $1.6 million.

NASA Johnson Space Center (JSC) uses Salesforce in its External Relations office. This department coordinates between JSC, the press, research institutions, academic institutions, and the general public. JSC uses Salesforce for a wide range of activities, including scheduling astronaut visits to schools, coordinating research on the International Space Station with leading universities, and tracking the location and disposition of space artifacts, such as moon rocks, that JSC has out on loan to libraries, schools, and museums. NASA JSC has successfully deployed Salesforce Sales and Marketing Cloud (specifically, Social Studio) *to maintain a 360-degree view of all accounts and contacts* – citizens, vendors, congressman, media, and partners. In addition to Salesforce's Sales Cloud solution, JSC has built custom applications on the Salesforce Platform to meet specific application requirements.

Amtrak deployed a customer engagement center with Salesforce Service Cloud to support its 1,000 station agents and 1,000 call center agents. The transportation company also deployed Marketing Cloud to provide 1:1 mobile, social, and email engagement. Amtrak's Travel Distribution Platform (TDP) program aligns directly with Amtrak's top corporate goal: "Customer Focus: to acquire and retain the most satisfied customers of any travel company in the world." Amtrak previously had siloed service channels, which made it difficult for station agents and call centers to be productive and for third parties to integrate for upsell. Amtrak was unable to engage with customers beyond the purchase of a train ticket and was managing multiple customer profiles and multiple communication outreach tools; it also had no integrated mobile experience. With Salesforce, Amtrak is able to focus on the customer by providing a consolidated customer engagement counsel that empowers agents to be more efficient, encourages self-service, provides an end-to-end personalized customer journey, achieves a consolidated view of customers, and gives traveling customers a choice to have a mobile-first experience.

Chicago Housing Authority reduced efforts inputting data and transferring caseloads between agencies by more than 50% by deploying a housing resident case management tracking system on the Salesforce Platform.

Chicago Housing Authority, the nation's third largest public housing system, had no real integrated system to manage candidates across its agency. Chicago Housing Authority *reduced efforts* inputting data and transferring caseloads between agencies *by more than 50%* by deploying a housing resident case management tracking system on the Salesforce Platform. The new system includes self-audits as well as tracking of clinician, program, and division productivity. The agency's complex security needs were met with Salesforce's comprehensive and flexible data sharing model, ensuring that the right users have access to the right information. Streamlining the candidate management process enables the Chicago Housing Authority's mission of building strong communities throughout the city. *View Customer Story*

Computer Sciences Corporation (CSC) is an American multinational corporation that provides information technology services and professional services. CSC offers a broad array of end-to-end business solutions, including outsourcing services, systems analysis, applications development, network operations, cybersecurity, business processes as a service (BPaaS), systems integration, and both technical and non-technical consulting. CSC desired a fundamental shift in their global CRM strategy with the implementation of a modern, agile platform for application development, marketing, and collaboration. At the time, the CSC sales organization was running SAP CRM worldwide. Sales teams operated in silos, lacked process consistency and alignment, had limited visibility into customer data, and needed a better way to identify cross-sell and up-sell opportunities. CSC turned to Salesforce's Sales Cloud for out-of-the-box CRM and sales force automation (SFA) functionality. On top of standard account, contact, and opportunity management, CSC heavily leverages workflow and approval routing. Salesforce's Chatter Plus provides the collaboration platform CSC needed to immediately dissolve silos across the company. The initial deal was designed to provide immediate value where CSC needed it most: visibility into business and global collaboration to increase sales faster. With Salesforce, CSC has accomplished this goal and is now looking into more Salesforce products to expand its solution.

State of Ohio Office of the Attorney General is using Salesforce for a legal accounts receivable "back tax" collection system. In a two-month development effort, the system presents back taxes that citizens owe on an authenticated portal that integrates to the state's payment gateway. *In the first five days of Go-Live, the state collected $1 million in back taxes.*

National Credit Union Administration (NCUA) Office of Consumer Protection deployed its Consumer Assistance Center Complaint System using Salesforce Service Cloud. NCUA is an independent regulatory agency within the Executive Branch of the United States responsible for chartering, supervising, and examining federally chartered credit unions and insuring the substantial majority of state-chartered credit unions. Its mission is to ensure the safety and soundness of insured credit unions through appropriate regulation and supervision, while effectively managing the agency's resources and the National Credit Union Share Insurance Fund. With Salesforce, NCUA Consumer Assistance Center seeks to improve processes used to maintain and report on consumer complaints, inquiries, and calls. This includes fully integrated workflow management and tracking for all telephonic inquiries and written correspondence.

City of Boston needed to simplify processes for business registration, permitting, licensing, and more, so it replaced bureaucracy with social technology. City governments play a big role in helping businesses set up shop and expand, creating jobs and fueling the local economy. The Boston Business Hub, a one-stop portal built on the Salesforce Platform, gives small businesses easy access to the information they need through a single point of entry portal, creating more transparency, streamlining and automating the process, and saving valuable time. The solution seamlessly integrates back-end data, automates workflow, and centralizes information from ten agencies. By streamlining and automating permit processes, the city has *reduced response time to two business days.* In addition, *40% of inquiries are now submitted online instead of through paper processes*, which improves the City's ability to attract new businesses and grow the local economy. *View Customer Story*

"Salesforce helps us connect with the local businesses, homeowners, developers, and non-profit partners that make our neighborhoods thrive."

MARTIN J. WALSH
MAYOR OF BOSTON

Texas Office of the Attorney General (OAG) wanted to increase case productivity, provide results in the forms of convictions, improve investigation management, and collaborate and track cases to improve efficiency. Using Salesforce, OAG implemented a number of internal and external facing applications. One application is for HIPAA compliance tracking. This application takes submitted HIPAA non-compliance complaints received by state agencies and provides reporting and tracking to the legislature for incidents by type, category, and agency. Additionally, the Medicaid Fraud Control Unit has selected Salesforce to serve as the case investigation solution to manage all aspects of Medicaid fraud control cases. By using Salesforce, OAG is able to easily share information across departments, increase collaboration, decrease response time, and see performance and manage costs within a single solution.

New York City Department of Health and Mental Hygiene manages emergency preparedness funds with the Salesforce Platform. New York City Department of Health and Mental Hygiene's Office of Emergency Preparedness and Response needed a better way to manage and award grants to help citywide public health preparedness. The agency rapidly deployed an application on the Salesforce

Platform that automates and streamlines business processes and allows better coordination with internal and external partners.

New Jersey Transit serves the largest statewide public transit system with more than 250 million passengers a year. The agency needed to elevate customer service and replace outdated systems. New Jersey Transit deployed a Salesforce customer service portal and contact center, plus social monitoring to improve customer service for 900,000 daily trips. The agency *increased handling of customer inquiries by 500% without increasing staff and reduced average response time by more than 35%.* It also deployed multiple customer service apps, including correspondence tracking, service quality, training, emergency response, group sales, volunteer management, and civil rights enforcement. NJ Transit is using an integrated Salesforce mobile app from the AppExchange to better manage its field investigations, anywhere from any device. The one app alone saved more than $200,000 in development costs and decreased the average response time from seven to two days without adding any additional staff. NJT is also using the Salesforce Marketing Cloud to listen to and engage with riders everywhere that are speaking to – and about – the agency. *View Customer Video*, *View Customer Story*

With Salesforce, New Jersey Transit increased handling of customer inquiries by 500% without adding staff and reduced average response time by more than 35%.

City-County of Denver deployed Salesforce Service Cloud engagement center solution for its 311 call center operations, replacing its legacy PeopleSoft CRM system. With Salesforce, the city-county has the tools it needs to increase responsiveness from Denver 311 agents with constituents and citizens. The city-county sought to improve efficiency and performance and reduce costs of its Denver 311 operations by reducing infrastructure and manual processes and leveraging workflow and automation capabilities. With Salesforce, the city-county can more effectively monitor and report usage statistics to agency management. The Denver 311 solution tightly integrates with departmental work order systems (i.e., Infor, Accela, Chameleon) to allow agencies to concentrate on issue resolution. The City-County of Denver now can more easily facilitate multi-department partnerships throughout the area. Multiple agencies use the new solution to manage inquiries, complaints, and requests from constituents and citizens across the Denver area. The Denver 311 solution also integrates with the city's GIS system (ESRI) to provide map-based management reporting. The Denver 311 solution provides multi-channel communication for constituents and citizens to interact with the city-county, including mobile, web, and social media integration along with the more traditional channels of telephone and email. Here is a link to the home page of the city-county's 311 solution: https://www.denvergov.org

Using the Salesforce Platform, Texas Department of Information Resources built a virtual app store for government. DIR has developed over 20 applications to facilitate policy, procurement, and IT service functions.

State of Colorado needed to track all citizen, employee, and business partner relationships in a single unified system. With Salesforce, the Colorado Governor's Office has *doubled the number of requests it processes each month*, without any increase in staff. When citizens, businesses, and local agencies

in Colorado want to engage with their government via online channels, the state makes sure they get to the right contact quickly and easily. Citizens and agencies can submit requests to www.colorado.gov from their desktops, smartphones, or tablets. Salesforce replaced a legacy application to improve response time and team productivity, while ensuring that all deserving inquiries receive a response.

Texas Department of Information Resources (DIR) provides policy, planning, and education guidance to all Texas state agencies as well as institutions of higher education. The agency needed to replace a wide-range of cumbersome manual processes that suffered the usual manual pitfalls and inconsistencies. DIR originally began using Salesforce to manage procurement contracts so agencies from all over the state could take advantage of pre-negotiated deals for everything from desktop computers and monitors to professional services. Using the Salesforce Platform, DIR *built a virtual app store* for government. DIR has incrementally *developed more than 20 different applications*, like the Legislative Bill Tracking app for monitoring changes in policy, the Vendor Contract Management app used by the contracting and procurement services division as the contract management tool for more than 750 technology contracts, and IT-focused apps like Trouble Ticketing, Asset Tracking, Change Management, and Portfolio Management. *View Customer Story*

Michigan Health Information Network (MiHIN) uses Salesforce for the State Provider Directory supporting Health Information Exchange (HIE). MiHIN is the State of Michigan's initiative to improve healthcare quality, cost, efficiency, and patient safety through electronic exchange of health information. MiHIN mobilizes existing electronic health information in a manner that allows healthcare providers to access and exchange information easily and securely. MiHIN's provider directory, built on the Salesforce Platform, is the definitive source of information about the state's healthcare providers. It enables those providers to get the information they need when they need it, reducing inefficiencies and improving care. *View Customer Video*

"Salesforce helps us reduce the cost of delivering healthcare while also improving it."

TIM PLETCHER
EXECUTIVE DIRECTOR, MIHIN

Wisconsin Workforce Development is in the middle of America's mission to rebuild its workforce, literally and figuratively. In response to these challenges, Skills Wisconsin was formed with the help of a $6 million grant for the Department of Labor's Workforce Innovation fund. The goals of Skills Wisconsin are to increase placement outcomes by moving large caseloads of job-seekers into gainful employment and self-sufficiency, improve the matching of training offerings with business hiring needs, and improve the tracking of service delivery metrics and management of business customer information in real-time, to more effectively serve individual firms and industry cluster partnerships. The consortium faces a common set of challenges: 1) lack of real-time labor market and employer data and a way to manage it, 2) coordination of business services units among workforce development areas and economic development organizations, 3) the translation of employer hiring needs into training programs. To address these challenges and meet the goals of the Skills Wisconsin project, the consortium recognized that it needed a state-of-the-art technology platform. Skills Wisconsin deployed a Workforce Development App on the Salesforce Platform. The Workforce application includes modules for managing job seekers and employers, job and worker skills searching and inventory, and training management. Skill Wisconsin is poised to use a dynamic system that decreases response time to employers' needs and automatically gathers data on labor market skills gaps and needs to inform training programs. Business Services Units are also using Chatter to stay connected, helping them to coordinate among service areas. Skills Wisconsin uses a dynamic set of dashboard reports to provide greater visibility into activity at all levels,

from statewide to local. This real-time data enables quicker responses to employers' hiring and training needs and allows strategic investments in new training programs to maximize impact.

New Jersey Department of Labor and Workforce Development (NJLWD) has approximately 50,000 cases filed per year. NJLWD was at risk of losing federal funding for not complying with unemployment insurance reporting standards. NJLWD built a case management system and portal on the Salesforce Platform to track and correspond with citizens who are appealing unemployment claims. The Appeals Case Management solution provides end-to-end scalable support for the entire appeals process. The solution was deployed to 130 users in 16 weeks. NJLWD is now *compliant with reporting to USDOL for the first time in 9.5 years*. Case handling time drastically improved, and the agency's backlog of cases was reduced. NJLWD also *reduced average time lapse of appeal from 189 days to less than 19 days* (and still improving).

New Jersey Department of Labor and Workforce Development reduced the average time lapse of an appeal from 189 days to less than 19 days.

British Columbia Ministry of Social Services and Social Innovation deployed a Case Management System based using Salesforce Service Cloud that enables case workers, families, and other support team members to collaborate in support of Clients (adults with developmental disabilities). BC's new case management solution enables Client support teams to collaborate on their Clients' ongoing cases, providing a view that harmonizes the assessment and other documentation from various agencies, so that the caseworker and support team get a holistic picture of a client's situation and can decide on best care options. The system is truly enabling special needs adults between the ages of 18-25 to better transition into adulthood, gain independence, and continue to receive the support they need. The solution was built with comprehensive privacy controls and was implemented using an agile, iterative design approach in a period of only 4 months.

City and County of San Francisco needed a way to connect with its 800,000 citizens. Home to some of technology's most innovative leaders, San Francisco is pioneering the way governments use technology to connect with citizens. San Francisco uses Salesforce Marketing Cloud for social monitoring to listen and engage with its residents, get the word out on events or service disruptions, and share or comment on breaking news. *View Customer Video*

Utah's Department of Community and Culture, Division of Arts and Museums, needed a solution to efficiently track outreach efforts and interactions with artists and the general public. The division deployed Salesforce CRM and built an application on the Salesforce AppExchange to automate processes, centralize data, and track grants, programming events, and other interactions with its citizens. Utah Division of Arts and Museums *saves over 800 hours per year in reporting* using Salesforce. *View Customer Video*

Utah Division of Arts and Museums saves more than 800 hours per year in reporting using Salesforce.

City of Hampton, Virginia, implemented a mobile inspection solution as part of a larger Community Development system project. Inspectors in the Community Development Department and the Fire Department respond to complaints and inspection requests through the use of iPads with the BasicGov

application from the Salesforce AppExchange (powered by the Salesforce Platform) and integrated with the city's Geographic Information System (GIS). The system supports a streamlined business process, which allows inspectors to do more daily inspections through mobile technology and an automated workflow process. In addition, the new service model allows the IT department to *reduce infrastructure costs and deploy services quicker* through a Cloud service.

Japan Post delivers for more than 100 million customers with Salesforce. Serving banking customers and delivering a staggering 16 billion-plus pieces of mail each year, Japan Post needed a flexible system to help manage its businesses that would easily adapt as customer needs change. Apps built with the Salesforce Platform are helping the organization become more efficient, from retail banking compliance to parcel collection. As a result, Japan Post has seen a *75% reduction in app development time, a 50% savings over the cost of the previous solution, and $10M in overall savings.* *View Customer Video*

Salesforce Licensing & Procurement Options

Agencies can benefit from quicker, faster, and safer access to high-quality, cost-effective Salesforce services through government-wide Blanket Purchase Agreements (BPAs) in place at agencies such as HHS, USDA, and GSA as well as a range of contract vehicles. Additionally, 8(a) companies and other small businesses can purchase Salesforce for resale through authorized reseller channel partners.

To get agency customers up and running, Salesforce has a large ecosystem of certified, trusted system integration partners with domain expertise that can support the organization's Salesforce implementation.

Government Contract Vehicles for Salesforce PaaS and SaaS Products

The following table delineates the government contract vehicles the can be used to procure Salesforce Software as a Service and Platform as a Service.

Contract Type	Contract Vehicle
GSA IT 70	Carahsoft (GS-35F-0119Y) IMMIX (GS-35F-0511T)
NASA SEWP V	Carahsoft (NNG15SC27B) IMMIX (NNG15SC16B)
NETCENTS	IMMIX (FA8732-13-D-0018)

Salesforce can also be acquired utilizing a number of BPAs:

- ***U.S. Department of Health & Human Services (HHS) Salesforce Cloud Services BPA***. U.S. HHS recently selected Salesforce for a $100 million BPA. With this BPA, Salesforce will be more accessible

and cost-efficient for HHS divisions. More than 20 production organizations have implemented Salesforce solutions across HHS. *View Press Release for more information*

- ***U.S. Department of Agriculture (USDA) Salesforce Cloud Services BPA***. USDA selected Salesforce for CRM Software, hosting, and support services. This BPA provides standardization, capacity sharing, and modular replication across the USDA enterprise.
- ***GSA Salesforce Implementation, Integration, and Support Services (SIISS) GWAC BPA***. Salesforce has an ecosystem of Salesforce certified system integration partners that provide Salesforce implementation services. GSA recently awarded a *GWAC BPA* for SIISS. Agencies can leverage this BPA to acquire implementation services from some of the Salesforce partners that were awarded this SIISS contract (Accenture, Acumen Solutions, Capgemini, Deloitte, PhaseOne, and PricewaterhouseCoopers). This BPA actively supports the Federal Information Technology Acquisition Reform Act (FITARA, H.R. 1232) by establishing standards that make it possible for agencies to reuse and share hundreds of applications and public-facing community portals in support of tens of thousands of users. It also provides a single government-wide vehicle that can replace numerous agency-specific contracts, reducing both contract duplication and contract administration costs for the government.

Salesforce recommends that whenever possible, agencies consider requiring government ownership of the enabling technology solution agreement and data rights from the outset of the project. Specifically, consider decoupling the Salesforce SaaS/PaaS solution licensing from the System Integration provider's implementation services. Forming two separate agreements, rather than acquiring both at the same time as a single contract award, provides the greatest flexibility and value and allows agencies to pre-select the right solution provider and the right system integrator.

Government Trusted Security & Infrastructure

Its multi-tenant Cloud platform architecture enables Salesforce to leverage a common infrastructure and software code base across all of its customers, who in turn benefit from access to the most current release of the application, periodic upgrades, more rapid innovation, and the economies of a shared infrastructure.

Salesforce understands that the confidentiality, integrity, and availability of customer information are vital both to customer business operations and Salesforce's own success. As such, Salesforce takes a multi-layered approach to protect that key information, constantly monitoring and improving its application, systems, and processes to meet the growing security demands and challenges.

Independent audits confirm that Salesforce security goes far beyond what most companies have been able to achieve on their own. Using the latest firewall protection, intrusion detection systems, and Transport Layer Security (TLS) encryption, the Salesforce Force.com platform peace of mind that only a world-class security infrastructure can provide.

Third-Party Validation

Security is a multidimensional business imperative that demands consideration at every level, from security for applications and networks to physical facility security. In addition to the latest technologies, world-class security requires ongoing adherence to best-practice policies. To ensure this adherence,

Salesforce continually seeks relevant third-party certification, including ISO 27001; SysTrust audit (the recognized standard for system security); and SSAE 16 SOC audit (an examination and assessment of internal corporate controls, previously known as SAS 70 Type II).

Salesforce and its Force.com platform is ISO 27001 certified and PCI-DSS compliant. SOC1, SOC2, and SOC3 audits are performed by third parties annually at a minimum. Additional audits and certifications include FedRAMP ATO from Department of Health and Human Services for the Salesforce Government Cloud; CSA "Consensus Assessments Initiative"; JIPDC, the Japan Privacy Seal; Tuv, the Germany Privacy Mark; and TRUSTe.

Protection at the Application Level

Salesforce protects customer data by ensuring that only authorized users can access it. Administrators assign data security rules that determine which data users can access. Sharing models define company-wide defaults and data access based on a role hierarchy. All data is encrypted in transfer, and all access is governed by strict password security policies. All passwords are stored in Secure Hash Algorithm (SHA) 256 one-way hash format. Applications are continually monitored for security violation attempts.

Protection at the Facilities Level

Salesforce security standards are on par with the best civilian data centers in the world, including the world's most security-conscious financial institutions. Authorized personnel must pass through five levels of biometric scanning to reach the Salesforce system cages. All buildings are completely anonymous, with bullet-resistant exterior walls and embassy-grade concrete posts and planters around the perimeter. All exterior entrances feature silent alarm systems that notify law enforcement in the event of suspicion or intrusion. Data is backed up to disk and to tape, with tape providing a second level of physical protection. Neither disks nor tapes ever leave the data center.

Protection at the Network Level

Multilevel security products from leading security vendors and proven security practices ensure network security. To prevent malicious attacks through unmonitored ports, external firewalls allow only HTTP and HTTPS traffic on ports 80 and 443, along with ICMP traffic. Switches ensure that the network complies with the RFC 1918 standard and address translation technologies to further enhance network security. IDS sensors protect all network segments. Internal software systems are protected by two-factor authentication and with the extensive use of technology that controls points of entry. All networks are certified through third-party vulnerability assessment programs.

Salesforce Government Cloud

On May 23, 2014 Salesforce achieved a FedRAMP Agency Authority to Operate at the moderate impact level issued by Health and Human Services (HHS) for the Salesforce Government Cloud. Testing for the ATO was performed by a third party assessment organization (3PAO). The Salesforce Government Cloud information system and authorization boundary, is comprised of the Force.com Platform*, Analytics Cloud, Health Cloud, Salesforce Services (Sales Cloud, Service Cloud, Chatter, Work.com, as well as, features of these applications including Content, Ideas, Knowledge, Chatter messenger, Chatter files, customer facing Chatter groups, Chatter answers, Salesforce Platform Encryption, Event Monitoring) and Salesforce Industry Applications, as well as, the backend infrastructure (servers, network devices,

databases, storage arrays) that support the operations of these products, referred to as the General Support System (GSS).

Salesforce was the first Cloud Service Provider to attain FedRAMP Authority to Operate (moderate baseline controls) for both SaaS and PaaS.

To obtain compliance with FedRAMP, Salesforce conducted security assessment and authorization activities in accordance with FedRAMP guidance, NIST 800-37, and HHS guidance. As part of this process Salesforce documented a System Security Plan (SSP) for the Salesforce Government Cloud service offering. The SSP is developed in accordance with NIST SP 800-18, Guide for Developing Federal Information System Security Plans. The SSP identifies control implementations for the GSS and in-scope customer-facing products (Salesforce Platform, Salesforce Applications) according to the FedRAMP moderate baseline and HHS security control parameters. A security assessment of the information system was conducted by a third-party assessment organization (3PAO) in accordance with NIST 800-53 and FedRAMP requirements. The security assessment testing determined the adequacy of the management, operational, and technical security controls used to protect the confidentiality, integrity, and availability of the Salesforce service and the Customer Data it stores, transmits, and processes.

To maintain compliance with FedRAMP, Salesforce conducts continuous monitoring. Continuous monitoring includes ongoing technical vulnerability detection and remediation, remediation of open compliance-related findings, and at least annual independent assessment of a selection of security controls by a third-party assessment organization. As part of its FedRAMP annual assessment, Salesforce is now aligned with NIST 800-53, Rev. 4, control.

* *NOTE:* Only Force.com Platform, which is bundled with this product, is included under the FedRAMP Authorization Boundary for the Salesforce Government Cloud. All other platform products are excluded.

For more information on the Salesforce Government Cloud, please see the *Salesforce Government Cloud white paper*.

Encryption Capabilities

Salesforce has many customers that are subject to laws pertaining to the processing of personally identifiable information (PII) or personal data. Salesforce offers its customers a broad spectrum of functionalities and customer-controlled security features that customers may implement in their respective uses of the Salesforce services. Salesforce believes that these provide customers the flexibility to comply with laws with stringent privacy and security requirements.

Data In Motion

All transmissions between the user and the Salesforce Services are TLS-encrypted with a 2,048-bit Public Key. The services use International/Global Step Up TLS certificates, with AES 256-bit encryption by default.

Data At Rest

Salesforce includes a feature to encrypt custom text fields (ECF):

- The fields can be masked appropriately for specific data types (e.g., credit card number, Social Security Number, National Insurance Number, Social Insurance Number).

- Access to read the masked parts of the fields is limited by the "View Encrypted Data" permission, which is not enabled by default.
- Customers can manage their encryption key based on their organization's security needs and regulatory requirements. See the Salesforce Help and Training site for details: https://help.salesforce.com/articleView?id=security_keys_using_master.htm&language=en_US&type=0&release=204.12.1
- Encrypted fields are encrypted with 128-bit keys and use the AES algorithm.

Additional Salesforce Encryption Capabilities

Apex Code. Apex Code extends the powerful and proven success of the Force.com platform by introducing the ability to write code that runs on Salesforce servers. This language makes possible the development of a new class of application and features deployed entirely on demand. Using Apex, your Agency can create user interface classes that utilize the Apex crypto class to encrypt field-level data up to AES 256-bit encryption. Please see the Salesforce website for more information: https://www.salesforce.com/us/developer/docs/apexcode/Content/apex_classes_restful_crypto.htm

Salesforce Platform Encryption (Additional Licensing Option). Salesforce Platform Encryption sets up in minutes, with no additional hardware or software, and uses native strong, standards-based encryption. Platform Encryption provides an extra layer to Salesforce's security while enabling customers to enjoy business critical Platform features, such as search, workflow, and validation rules.

Agencies can use Platform Encryption so the organization can confidently prove compliance with privacy policies, regulatory requirements, and contractual obligations for handling private data.

Platform Encryption combines native platform encryption with key management features. Data is encrypted at rest using a hardware security module-based key derivation system. These features allow agencies to protect data at a more granular level than Classic Encryption while still giving users the ability to perform necessary tasks. With this option, agencies can:

- Encrypt files and attachments (including email attachments).
- Encrypt certain standard and custom fields.
- Encrypt Knowledge article fields and attachments.
- Use an advanced key management system.

Platform Encryption helps address some concerns about protecting confidential information. It prevents sensitive data from residing in clear, decipherable form and allows customers to manage tenant secrets, which are used to derive the keys that protect their data. Salesforce is committed to high security standards and offers multiple data encryption options. Customers who want to adopt or extend their use of Salesforce can consider using Platform Encryption to comply with various standards.

Additional details on Salesforce Platform Encryption are provided in the *Platform Encryption Architecture White Paper.*

Real-Time Information on Performance and Security

Trust.salesforce.com is the Salesforce community's home for real-time information on system performance and security. This site hosts:

- Live and historical data on system performance
- Up-to-the minute information on planned maintenance
- Updates on phishing, malicious software, and social engineering threats
- Best security practices for your organization
- Information on how we safeguard customer data

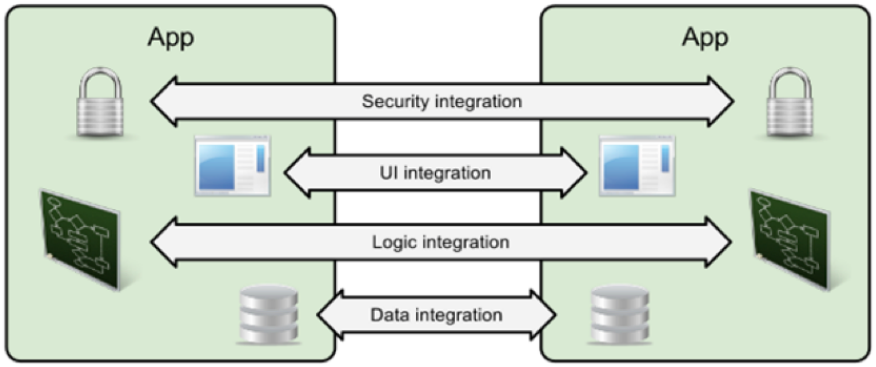
Proven, Real-time Integration

Connecting Salesforce to an existing enterprise application is a common and frequently performed task. Integration options include native web services support (APIs, outbound workflow, etc.), import/export utilities, and middleware integration via packaged connectors to toolkits for Java, .NET, and other open platforms. Our solution provides the ability to call out to virtually all common APIs, enabling synchronization, push / pull, and mash-ups with external apps/systems. Salesforce itself utilizes web-service-based APIs that in turn simplify access to Salesforce data from external systems. API-based integration is heavily leveraged by our customers.

APIs are provided with the Salesforce Force.com platform to build integration interfaces with third-party applications or by Salesforce integration partners to use in their connectors. Any third-party application that accesses a customer's Salesforce instance via the APIs is subject to the same security protections that are used in the customer's Salesforce user interface. Therefore, the third-party application will need to use a "granted" user to access Salesforce data. These are open APIs (based on industry standards such as REST and SOAP) that are used to integrate Salesforce endpoints with external endpoints, such as apps or enterprise integration hubs – for example, the Batch and Bulk APIs used in the Data integration patterns, or the SOAP and REST APIs used for UI integration patterns.

Integration Options as Various Layers of a Solution

Salesforce lets customers choose integration methods at different layers to optimally align with business requirements, security policies, and master data management guidelines. Specifically, agencies can choose how best to integrate across Security, User Interface, Business Logic, and Data Integration layers as shown in the diagram below. For more details on optimal design patterns for integration, see the white paper "Integration Patterns and Practices" at:
https://resources.docs.salesforce.com/sfdc/pdf/integration_patterns_and_practices.pdf



Five Paths to Integration Success

Salesforce Force.com provides paths to integration success—all based on its industry-leading web services API—and an extensive integration partner ecosystem. Integration with Salesforce Force.com means faster, simpler, and less risky integration that doesn't break during upgrades and delivers a new level of access and agility to existing IT investments.

1. *Choose your integration middleware.* Force.com is designed to work with all major integration middleware solutions. For a list of certified integration solutions, check out the "Integration" category in the AppExchange marketplace (https://appexchange.salesforce.com/category/integration). Here you'll find pre-built connectors and the services of numerous integration technology partners, such as IBM CastIron, Informatica Software, and Jitterbit.
2. *Build it yourself.* For building custom integrations with maximum flexibility and choice, the Salesforce Force.com platform supports all major development environments and tools, including .NET, Java, PHP, Ruby on Rails, and many more. Learn more from the wiki developer network at developer.force.com. *Learn more.*
3. *Find it on the AppExchange.* For the easiest and fastest way to add pre-integrated functionality, check the AppExchange directory and integrate with more than 3,200 components and applications with the click of a mouse. Learn more at appexchange.salesforce.com, where find both free and pay-as-you-go licensed add-ons reside. *Learn more*
4. *Connect the Clouds.* Harness the power of multiple clouds. Learn how to connect Salesforce Force.com with the data and content of the most popular Cloud services, including Amazon Web Services, Facebook, Google AppEngine, and Twitter. As one option: Enrich Salesforce Contacts profiles by integrating with the likes of Facebook or Twitter to create a single, 360-degree view of citizen customers.
5. *Use Salesforce native connectors.* Whether integrating with the most common desktop productivity tools (Microsoft Excel, Microsoft Outlook, Microsoft Word) or ERP suites from Oracle or SAP, Force.com provides proven native connectors. Salesforce applications have proven to be an excellent way to get critical data from Oracle accounting and ERP applications into the hands of a much larger customer-facing audience. Information from Oracle ERP application suites, Oracle databases, or Oracle Fusion middleware can be easily exposed within Salesforce, creating innovative and effective

end-to-end business processes that drive higher user adoption and result in more effective business strategies.

For more information on integration capabilities, please visit:
https://developer.salesforce.com/page/Integration

Developer toolkits

Salesforce toolkits provide the ultimate in integration flexibility and choice. The Force.com platform supports all major development environments and tools, including Java, .NET, PHP, and Ruby on Rails.

Robust APIs

Salesforce Force.com platform provides programmatic access to agency information using simple, powerful, and secure application programming interfaces. Central to the ability to integrate and extend Salesforce is the powerful and modern Web Services API. Architected around the latest standards, including SOAP, WSDL, and WS-I Basic Profile, this web service provides the complete set of operations necessary to complete ever demanding integration projects. As an open web service, Salesforce provides its complete object model, and the API is available to all platforms that support the core web services standards, including Java, .NET, and Perl.

Out-of-the-box, Salesforce provides powerful APIs:

- *REST API*: Access objects in the Salesforce organization using REST. The Force.com REST API allows integration with Force.com applications using simple HTTP methods, in either XML or JSON formats, making this an ideal API for developing mobile applications or external clients.
- *SOAP API*: Integrate agency Salesforce data with other applications using SOAP. The Force.com SOAP API (formerly known as the Force.com Web Services API) allows integration with Force.com applications that can create, retrieve, update, or delete records managed by Salesforce.
- *Tooling API*: Build custom development tools for Force.com applications. Tooling API provides SOAP and REST interfaces that allow agency customers to build custom development tools for Force.com applications. While other Salesforce APIs can handle deployment, Tooling API was designed from the ground up to support the entire development lifecycle, including design, implementation, deployment, and maintenance.
- *Chatter REST API*: Access Chatter feeds and social data such as users, groups, followers, and files using REST. Use Chatter REST API to integrate mobile apps, intranet sites, and third-party web applications with Salesforce. Chatter REST API provides resources for feeds, comments, likes, users, groups, private messages, recommendations, topics, and more. Chatter REST API is on by default in all organizations and editions that have Chatter.
- *Bulk API*: Load or delete large numbers of records. The Bulk API is a RESTful API that is optimal for loading or deleting large sets of data. Use it to query, insert, update, upsert, or delete a large number of records asynchronously by submitting batches that Salesforce processes in the background.
- *Metadata API*: Manage customizations within the agency organization and build tools that manage the metadata model (i.e., not the data itself). The Platform exposes a Metadata API—a SOAP-based web service—that allows access to metadata in the same way users access any of their Force.com applications, from any location on the web.
- *Streaming API*: Provide a stream of data reflecting data changes within the agency's organization. Force.com Streaming API exposes a near real-time stream of data from the Force.com platform.

Administrators can create topics, to which applications can subscribe, and receive asynchronous notifications of changes to data in Force.com.

- *Apex REST API*: Build a custom REST API in Apex to expose Apex classes and methods as RESTful web services.
- *Apex SOAP API*: Create custom SOAP web services in Apex. This API exposes Apex classes as SOAP web services, allowing an external application to invoke Apex methods through SOAP web services.
- *Data.com API*: Data.com provides 100% complete, high-quality data, updated in real-time in the Cloud, and with comprehensive coverage worldwide. The Data.com API leverages Salesforce Data.com Prospector and Data.com Clean to provide accurate account and contact information from Data.com.

More information about Salesforce APIs, including full reference documentation, is available at https://developer.salesforce.com/page/Salesforce_APIs

User Access: Roles and Permissions

Via a single, easy-to-read page depicting the role hierarchy, Salesforce enables administrators to manage roles and the relationships between roles from within the application. All users and application-level security are defined and maintained by the organization's administrator, not by Salesforce. The organization administrator is appointed by the customer. An organization's sharing model sets the default access that users have to each other's data.

As detailed in the accompanying table, there are four sharing models: Private, Public Read Only, Public Read/Write, and Public Read/Write/Transfer.

Sharing Model	Description
Private	Only the record owner, and users above that role in the hierarchy, can view, edit, and report on those records.
Public Read Only	All users can view and report on records but not edit them. Only the owner, and users above that role in the hierarchy, can edit those records.
Public Read/Write	All users can view, edit, and report on all records.
Public Read/Write/Transfer	All users can view, edit, transfer, and report on all records. Only available for cases or leads.

There are also several sharing model elements – Profiles, User Roles, Hierarchy, Record Types, Page Layouts, and Field Level security – the details of which are provided below:

Profiles. A profile contains the settings and permissions that control what a user can do within Salesforce. Profiles control:

- The standard and custom apps the user can view (depending on user license)
- The service providers the user can access
- The tabs the user can view (depending on user license and other factors, such as access to Salesforce CRM content)
- The administrative and general permissions the user has for managing the organization and the apps within it
- The object permissions the user is granted to create, read, edit, and delete records
- The page layouts a user sees
- Field-level security access for viewing and editing specific fields
- The record types that are available to the user
- The desktop clients that a user can access and related options
- The hours during which and IP addresses from which the user can log in
- The Apex classes a user can execute
- The Visualforce pages a user can access

User Roles. Every user must be assigned to a role, or their data will not display in opportunity reports, forecast rollups, and other displays that are based on roles.

- All users that require visibility to the entire organization should be assigned the highest level in the hierarchy.
- When a user's role is changed, any relevant sharing rules are reevaluated to add or remove access as necessary.

Hierarchy. A hierarchy of roles should be defined to control access of information entered by users in lower level roles. It is not necessary to create individual user roles for each title at the company.

Record Types. If the customer organization uses record types, edit the record type to modify which pick-list values are visible for the record type. A default pick-list values set can be established based on the record type for various divisions.

Page Layouts. Page layouts control the layout and organization of buttons, fields, s-controls, Visualforce, custom links, and related lists.

Field Level Security. Field-level security settings let administrators restrict user access to view and edit specific fields on Detail and Edit pages and in related lists, list views, reports, Offline Edition, search results, email and mail merge templates, Custom Links, and when synchronizing data.

The fields that users see in Detail and Edit pages are a combination of page layouts and field-level security settings. The most restrictive field access settings of the two always apply. For example, if a field is required in the page layout and read-only in the field-level security settings, the field-level security overrides the page layout and the field will be read-only for the user.

Premier Success Plans

Salesforce customers benefit most from Premier and Premier+ Success Plans. Attributes of each plan are highlighted below.

Premier Success Plan

The Premier Success plan is a mix of support and training. Salesforce-certified support reps provide expert answers to questions any day, anytime, they arise. The Premier Success Plan also offers end-user training on Salesforce products and provides a place to educate Salesforce admins and developers. Access the complete Salesforce library of online courses to build expertise in products, drive value, and maximize ROI.

The Premier Success Plan includes:

- Multichannel customer service: web, email, and phone support
- 24x7 toll-free phone support
- Priority case queuing and routing
- Quick initial one-hour response time for critical issues
- Unlimited access to the entire online Salesforce course catalog
- An assigned support account rep
- Force.com code troubleshooting
- Customizable end-user course templates
- Premier Success Review to measure usage and trends

Premier+ Success Plan

The Premier+ Success Plan provides all the benefits of the Premier Success Plan, including an assigned support rep, priority case routing, one-hour response time for critical issues, 24x7 phone support, unlimited usage of the entire online Salesforce course library, and access to a team of expert Salesforce administrators.

In addition to all the support and training benefits included in Premier Success Plans, Premier+ subscribers also receive:

- Access to a pool of Salesforce Certified Administrators who can configure and maintain the agency's Salesforce edition
- More than 100 administrative services
- Additional expertise and programs from Salesforce's Customers For Life (CFL) organization

NOTE: The Salesforce Government Cloud requires the use of the Premier+ Success Plan. Government Cloud users also receive technical support from Qualified U.S. Citizens.

Customers For Life Program

Salesforce's CFL organization is a global team dedicated to customer success. The mission of the CFL organization is to provide Salesforce customers with "the expertise they need when they need it." The Premier Success Plan and Premier+ Success Plan include access to Success Managers. Success Managers are product and market experts who engage with Customers to assist with Salesforce product adoption and utilization, including sharing advice and guidance related to optimizing Customer's ongoing use of Salesforce. Customer is responsible for evaluating any advice or guidance received from Salesforce and for implementing any such advice and guidance. Together, the CFL team works with your agency to create a Success Blueprint that defines business goals and a roadmap.

Salesforce's CFL program includes:

- Welcome and On Boarding
- Success Blueprint
- Customer Resource Center website (success.salesforce.com) with online Help, Learning Center, and Communities
- Personal Account Review (PAR) and Success Scorecard to analyze usage and provide prescriptive recommendations
- Adoption programs and toolkits to help customers take advantage of new products or features
- Customer Success Managers and Success Account Managers for Premier customers

CFL offers many resources and tools to get started, including the Customer Resource Center (success.salesforce.com) with online Help, Learning Center and Communities, where agencies can tap into training videos, a knowledgebase, or other customers' best practices. The Customer Success team includes several functions: Training and Certification, Customer Support, Strategic Services, Customer Success Management, and a network of system integration partners.

Ongoing success monitoring is a key part of Customer Success. Its Cloud computing model enables Salesforce to monitor usage data and determine whether customers are getting the most from their subscription. As part of the CFL program, Salesforce shares this information with customers through Personal Account Reviews and Success Scorecards and provides actionable recommendations for improvement. Customer Success offers programs to help customers roll out new features or products, with training and adoption toolkits, to ensure that customers' business benefit is always growing and that they remain customers for life.

Additional Resources

View a datasheet comparing the Premier and Premier+ Success Plan options here:
http://www.salesforce.com/assets/pdf/datasheets/DS_SuccessPlans.pdf

View more information regarding the Premier and Premier+ Success Plan options here:
http://www.salesforce.com/services-training/customer-support/#more