Frameworx 16.0 Solution Conformance Certification Report

Company Name: Salesforce

Solution Name:
  Salesforce solution for omni-channel service

Solution Version: Winter '17 Release

Report Version: 1.0
Report Date: February 2017

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1 Introduction

1.1 Executive Summary

This document provides details of the Salesforce self-assessment and TM Forum's Conformance Assessment of the **Salesforce solution for omni-channel for Communications**, against the following Frameworx 16.0 components:
- Business Process Framework Version 16.0

The assessment included a review of:
- The methodology approach to process modeling against the TM Forum's Business Process Framework Release 16.0 according to the specific processes submitted in scope for the Assessment.

Note that Conformance to the Information Framework (SID) Aggregate Business Entities (ABEs) was not covered in this Assessment.

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2   Solution Functionality/Capability Overview

2.1   Salesforce Solution Overview

In today's highly competitive Communications market, customers are increasingly demanding personalized experiences with their service providers. They want their communications service providers (CSPs) to *know them* and *make it simple* for them to do business with. Customers also want CSPs to help them as a team, so that they don't have to repeat themselves as different members of a team assist them. Customers today expect their best experience on any channel to be available on every channel. Hence, it is no surprise that they want their service providers to *give them control* so that they can interact in a way that works best for them – across devices and channels and in a sequence that makes sense to them. Beyond doubt, one can summarize that *customer experience* has become the new currency for CSPs.

As customers' behaviors evolve, CSPs must develop effective strategies to respond to their changing demands. Providing an omni-channel experience and differentiating themselves through exceptional customer service help ensure CSPs exceed customer expectations. CRM applications along with social and mobile cloud technologies from Salesforce have helped CSPs connect with customers, partners, and employees in entirely new ways. The [Salesforce Communications Framework](#) (Figure 2-1) is built on the Salesforce Customer Success Platform. It's a prescriptive framework that shows CSPs how to leverage Salesforce's multi-tenant, metadata driven, enterprise cloud development platform to provide an agile, customer-centric platform of engagement that works with a CSP's existing systems of record (BSS/OSS Systems).
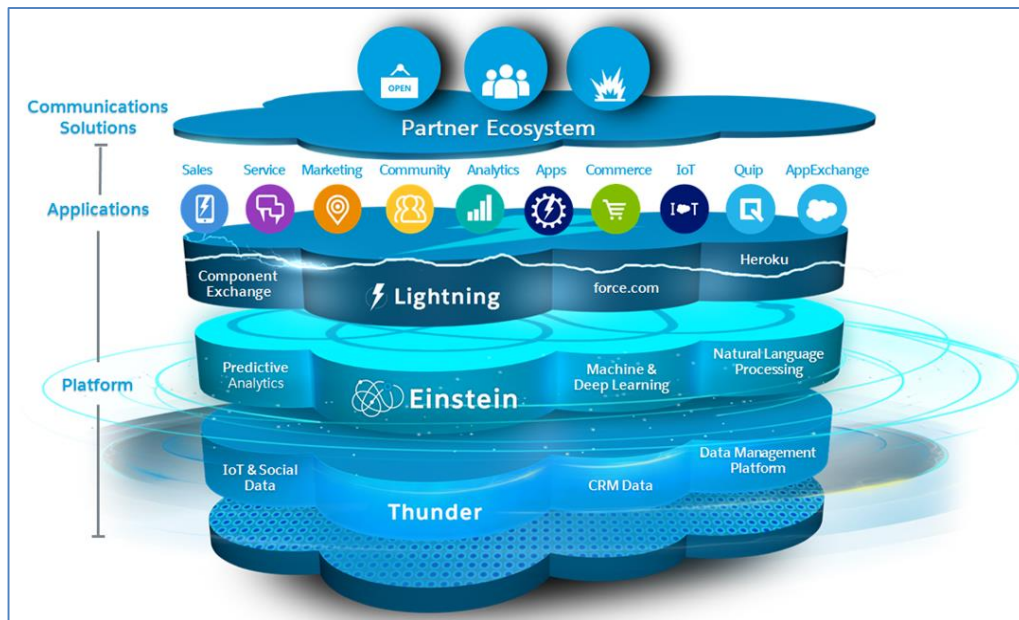
Figure 2-1 Salesforce Customer Success Platform for Communications

Salesforce Customer Success Platform provides all the capabilities required to deliver an omni-channel CRM solution from concept to cash for full lifecycle service management. The focus of this report is on how to apply the Salesforce Communications Framework to provide an omni-channel service solution based on the Salesforce Platform. All required functional components of this solution (as shown in Figure 2-2) can be implemented with Salesforce products[1] – Service Cloud, Community Cloud, Marketing Cloud and Analytics Cloud. By leveraging the framework in this way, CSPs can deliver:

❑ **Personalized Service:** Salesforce's mobile, social and community capabilities enables consistent and collaborative service across all assisted and unassisted channels

❑ **Productive Service:** Salesforce makes agents and managers more productive with a unified agent console to simplify the diagnosis and resolution of any billing & service issues in the first point of contact

❑ **Connected Service:** Salesforce is based on a single intelligent platform that enables 360-degree view of the customer.

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[1] For a list of all Salesforce products, please visit https://www.salesforce.com/products/
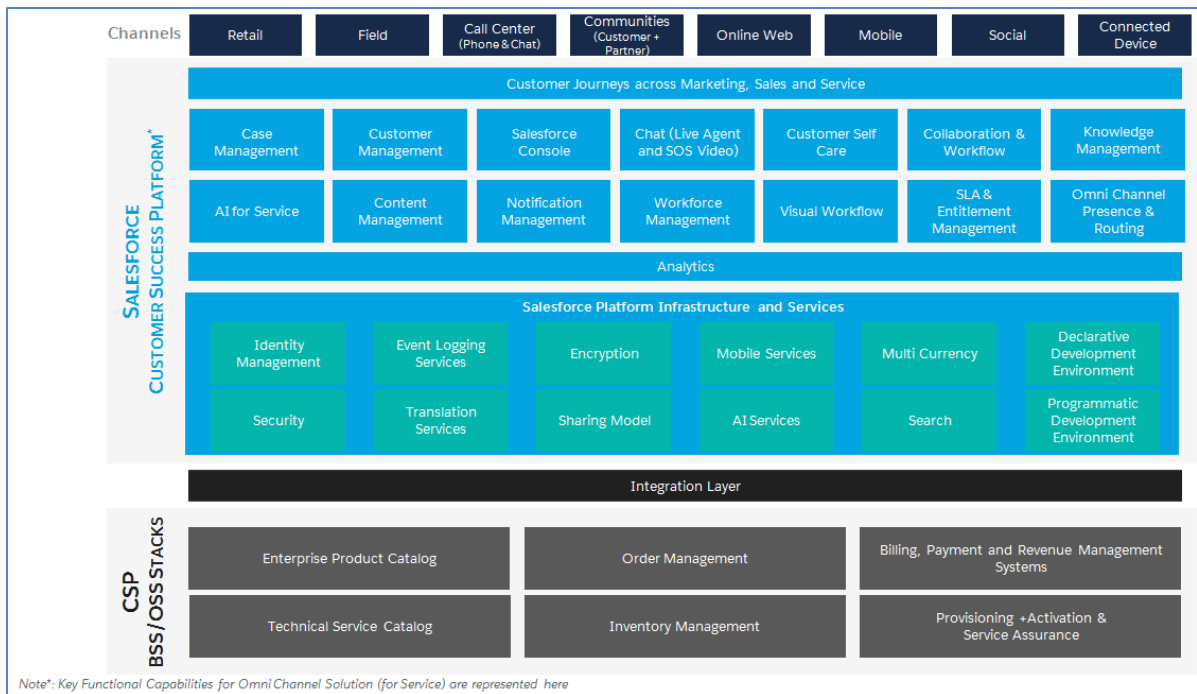
Figure 2-2 Salesforce Omni-Channel Solution for Service

Salesforce also provides a business app marketplace through <u>AppExchange</u>. Many of the functionalities mentioned above can be further extended or enriched with apps available in AppExchange.

Salesforce Service Cloud is the leading intelligent customer service platform that makes it easy to personalize every service interaction, make your agents and mobile workers more productive, and predict your customer needs with intelligence. With Service Cloud, CSPs can tap into the data-driven insights anywhere and provide personalized customer service on any channel or device. Agents can service smarter with *collaboration* and robust *case management* frameworks. The Lightning Service Console provides agents a 360-degree view of the customer and enables them to connect with customers in customer's preferred channel (Phone, Chat, Communities or Social). Service Cloud's *Omni-Channel Presence and Routing* functionality routes cases to right agents, based on evaluation of agent's skill and current workload and type of incoming cases. Built-in *Knowledge* functionality not only enhances self-service experience but also improves agent's productivity.

Salesforce Community Cloud helps an enterprise build communities for everyone critical to their business ecosystem - customers, partners and employees. This report has focused on Customer Community that can help CSPs create a rich self-service community for customers, allowing them to create and escalate service issues. Customers can also interact with each other, provide feedback, share their enthusiasm for the CSP brand and product,

and even purchase in the community.

Salesforce Marketing Cloud helps enterprises connect experiences across marketing, sales, service and every touchpoint. Omni-channel for service solution relies on *Journey Builder* functionality of Marketing Cloud that helps a CSP create 1-on-1 journeys to deliver a seamless experience. **Salesforce Analytics (Analytics Cloud)** is a cloud-based platform for analyzing data from multiple sources - Salesforce platform as well as external data (that may reside in a CSP's BSS/OSS system). It creates interactive views of that data, and shares those views in dashboards of business users.

All the products mentioned above are built on the **Salesforce1 Platform**, where security, agility, and extensibility come built-in, with open APIs that allow a CSP to connect with their BSS/OSS systems, allowing them to bring in customer data from various systems into one view.

Solution Certification Version

One of the most valuable benefits of Salesforce's multitenant platform is the ability to deliver three (Winter, Spring and Summer) automatic upgrades, with 450+ features each year. The power of three releases a year for the entire product suite automatically gives an enterprise new functionality without lengthy and costly upgrade cycles.

Products that fulfill requirements of Salesforce solution for omni-channel service are based on features made available in Winter '17 Release against TM Forum's Business Process Framework Version 16.0.

3   Business Process Framework Assessment Overview

3.1   Mapping Technique Employed

Business Process Framework Level 4 descriptions are analyzed by looking for implied tasks. (This is similar to how process decomposition can use Semantic Analysis). Each Business Process Framework process is supported by descriptive text. In many cases, each process is aligned and mapped to appropriate company documentation references solution, methodology or modeling material.

Note that when a Level 3 process has not been decomposed to Level 4 processes, the implied tasks for the given Level 3 process are analyzed.

The Business Process Framework Level 4 descriptions (or Level 3 if appropriate) are analyzed by looking for implied tasks. Color coded text as highlighted below is used as part of the process mapping whereby highlighted text indicates the level of support for a Level 4 process implied task:

- GREEN is used to highlight key words or key statements that are fully supported
- YELLOW is used to highlight key words/key statements that are partially supported
- GREY is used to highlight key words/key statements that are not supported
- No highlighting is used for words/statements that are irrelevant, just for reference or needed to complete the sentence.

Manual and Automated Support
It is important to determine whether the implied task is supported by manual steps, automated steps, or a combination of both. In this document, "A", "M", or "AM" is used for each task to indicate that the step or steps is/are automated (A), manual (M), or both (AM).

TM Forum Note 1: When process mappings are presented against Level 4 processes, the mappings are provided against the text in the "Mandatory" field for the process. In the event of the Mandatory field not being used, the process mappings are in that case provided against the Level 4 Brief/Extended descriptions.

TM Forum Note 2: Note that if a Level 3 process has not been decomposed to Level 4 processes in the Business Process Framework, in such cases the process mapping support is provided against the Level 4 process descriptions (Brief & Extended).

3.2 Business Process Framework Level 2 Process Scope

The following figure represents the Business Process Framework Level 2 processes (high-lighted in green) that were presented in scope for the assessment and that were assessed and support the corresponding Business Process Framework processes according to the results in Chapter 6 Frameworx Conformance Result.
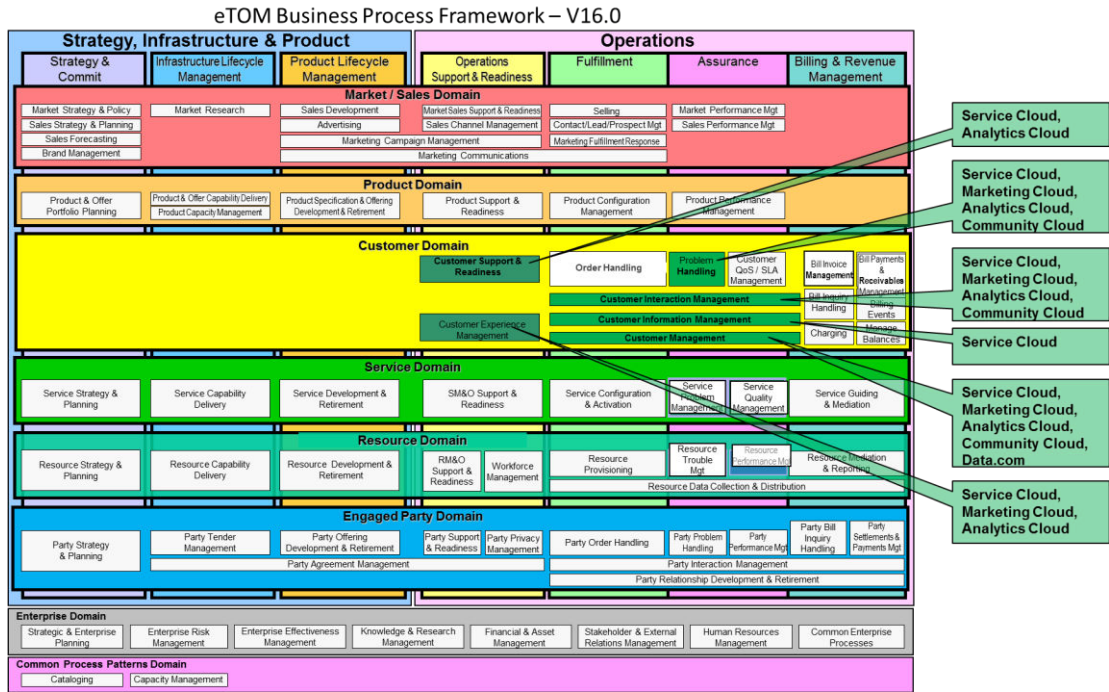
Figure 3-1 Level 2 process coverage for Salesforce Assessment

The following diagram identifies the number of Level 3 processes that were submitted for assessment, for each Level 2 process that was submitted in scope for the Assessment.
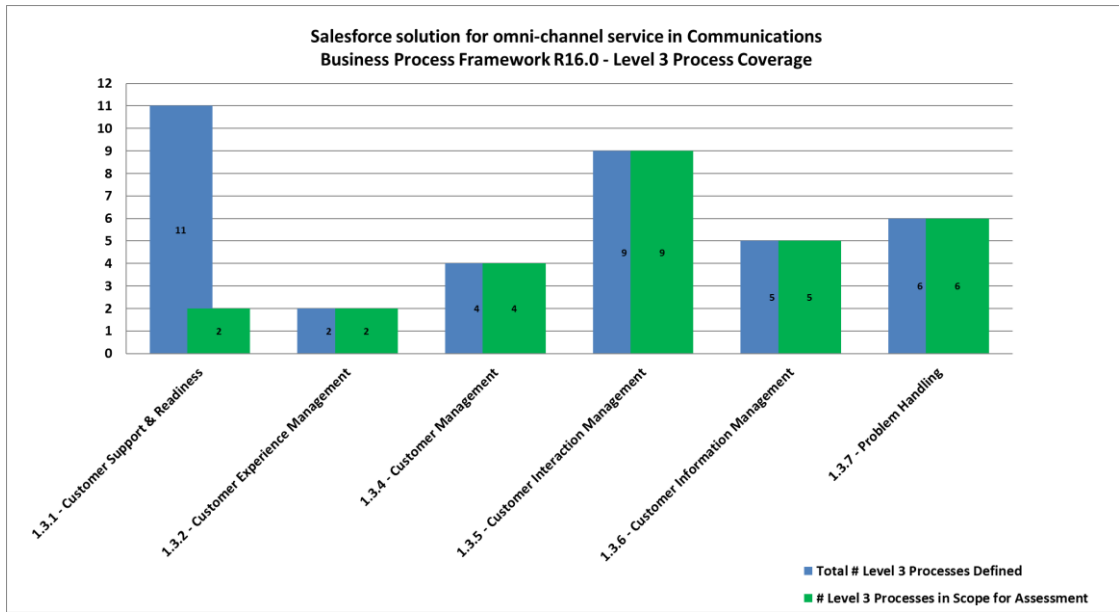
Figure 3-2 Level 3 process coverage for Salesforce Assessment

Table 3-1 Business Process Frameworx Assessment Scope

Salesforce solution for omni-channel service in Communications Frameworx 16.0 Business Process Framework - Assessment Scope
1.3 Customer Domain
Level 2: 1.3.1 - Customer Support & Readiness
1.3.1.1 - Support Customer Interface Management
1.3.1.2 - Support Order Handling
1.3.1.3 - Support Problem Handling
1.3.1.4 - Support Retention & Loyalty
1.3.1.5 - Manage Customer Inventory
1.3.1.6 - Support Bill Invoice Management
1.3.1.7 - Support Bill Payments & Receivables Management
1.3.1.8 - Support Bill Inquiry Handling
1.3.1.9 - Support Charging
1.3.1.10 - Support Manage Billing Events
1.3.1.11 - Support Manage Balance
Level 2: 1.3.2 - Customer Experience Management
1.3.2.1 - Customer Experience Maturity Assessment
1.3.2.4 - Mapping and Analysis of Experience Lifecycles
Level 2: 1.3.4 - Customer Management
1.3.4.1 - Enable Retention & Loyalty
1.3.4.2 - Establish Customer Relationship
1.3.4.3 - Re-establish Customer Relationship
1.3.4.4 - Terminate Customer Relationship
Level 2: 1.3.5 - Customer Interaction Management
1.3.5.1 - Create Customer Interaction
1.3.5.2 - Update Customer Interaction
1.3.5.3 - Close Customer Interaction
1.3.5.4 - Log Customer Interaction
1.3.5.5 - Notify Customer
1.3.5.6 - Track and Manage Customer Interaction
1.3.5.7 - Report Customer interaction
1.3.5.8 - Authenticate User
1.3.5.9 - Customer Interface Management
Level 2: 1.3.6 - Customer Information Management
1.3.6.1 - Create Customer Record
1.3.6.2 - Update Customer Data
1.3.6.3 - Notify Customer Data Change

1.3.6.4 - Archive Customer Data
1.3.6.5 - Build a unified customer view

Level 2: 1.3.7 - Problem Handling

1.3.7.1 - Isolate Customer Problem

1.3.7.2 - Report Customer Problem

1.3.7.3 - Track & Manage Customer Problem

1.3.7.4 - Close Customer Problem Report

1.3.7.5 - Create Customer Problem Report

1.3.7.6 - Correct & Recover Customer Problem

3.3 Solution Scope

The following diagram represents Salesforce Customer Success Platform showcasing some of the products (Service, Marketing, Community and Analytics) that were submitted in scope for the Conformance Certification assessment.

Figure 3-3 Salesforce Products in Scope for Conformance Assessment

4 Business Process Framework – Process Mapping Descriptions

This Section provides the Process Mapping output from Salesforce self-assessment which was reviewed by TM Forum Subject Matter Experts alongside supporting documentation for the Salesforce Solution.

4.1 Level 2: 1.3.1 - Customer Support & Readiness

4.1.1 Mapping Details & Supporting Evidence

The documented mapping information for all Level 3/Level 4 processes in scope for the "1.3.1. Customer Support & Readiness" business processes are available from the following link:
https://www.tmforum.org/wp-content/uploads/2017/02/Salesforce-eTOM-1.3.1-CustomerSupportReadiness-Mapping-Doc.pdf

Mappings and supporting evidence was presented for the following Level 3 processes:

- 1.3.1.1 - Support Customer Interface Management
- 1.3.1.3 - Support Problem Handling

4.1.2 Detailed Conformance Scores

The following table details the conformance scores awarded to the Level 3 and Level 4 processes submitted in scope for Level 2 process "1.3.1 - Customer Support & Readiness". The scoring guidelines are explained in Figure 6-1 in Section 6.1.

Salesforce chose not to submit some Level 3 and Level 4 processes for Frameworx conformance assessment, as these processes are not considered part of the Salesforce solution that was assessed.

Note that by not submitting Level 4 processes, this has an impact on the parent Level 3 process Conformance scores.

Table 4-1 1.3.1 - Customer Support & Readiness Conformance Scores

Salesforce solution for omni-channel service in Communications Frameworx 16.0 Business Process Framework Conformance Scores	
1.3 Customer Domain	
Level 2: 1.3.1 - Customer Support & Readiness	**Conformance Scores**
1.3.1.1 - Support Customer Interface Management	**4.0**
1.3.1.1.1 - Ensure Customer Interface Capability	100%
1.3.1.1.2 - Undertake Customer Contacts Trend Analysis	Not submitted
1.3.1.2 - Support Order Handling	*Not in Scope*
1.3.1.3 - Support Problem Handling	**3.6**
1.3.1.3.1 - Ensure Product Offering Operation	Not submitted
1.3.1.3.2 - Undertake Product Offering Trend Analysis	Not submitted
1.3.1.3.3 - Request Product Offering Data Collection	Not submitted
1.3.1.3.4 - Request Product Offering Performance Testing	Not submitted
1.3.1.3.5 - Manage Product Offering Maintenance Programs	Not submitted
1.3.1.3.6 - Request Provisioning Intervention	Not submitted
1.3.1.3.7 - Report Product Offering Trend Analysis	Not submitted
1.3.1.3.8 - Track Problem Handling Process Capability	100%
1.3.1.3.9 - Manage Problem Handling Notification	100%
1.3.1.3.10 - Undertake Problem Handling Trend Analysis	100%
1.3.1.4 - Support Retention & Loyalty	*Not in Scope*
1.3.1.5 - Manage Customer Inventory	*Not in Scope*
1.3.1.6 - Support Bill Invoice Management	*Not in Scope*
1.3.1.7 - Support Bill Payments & Receivables Management	*Not in Scope*
1.3.1.8 - Support Bill Inquiry Handling	*Not in Scope*
1.3.1.9 - Support Charging	*Not in Scope*
1.3.1.10 - Support Manage Billing Events	*Not in Scope*
1.3.1.11 - Support Manage Balance	*Not in Scope*

4.2 Level 2: 1.3.2 - Customer Experience Management

4.2.1 Mapping Details & Supporting Evidence

The documented mapping information for all Level 3/Level 4 processes in scope for the "1.3.2 - Customer Experience Management" business processes are available from the following link:
https://www.tmforum.org/wp-content/uploads/2017/02/Salesforce-eTOM-1.3.2-CustomerExperienceMgt-Mapping-Doc.pdf

Mappings and supporting evidence was presented for the following Level 3 processes:

- 1.3.2.1 - Customer Experience Maturity Assessment
- 1.3.2.4 - Mapping and Analysis of Experience Lifecycles

4.2.2 Detailed Conformance Scores

The following table details the conformance scores awarded to the Level 3 and Level 4 processes submitted in scope for Level 2 process "1.3.2 - Customer Experience Management". The scoring guidelines are explained in Figure 6-1 in Section 6.1.

Note that for Level 3 process "1.3.2.1 - Customer Experience Maturity Assessment", there is no further decomposition to Level 4 processes. Hence, scores are awarded based on mapping support to the Level 3 process descriptions.

Table 4-2 1.3.2 - Customer Experience Management Conformance Scores

Salesforce solution for omni-channel service in Communications Frameworx 16.0 Business Process Framework Conformance Scores	
1.3 Customer Domain Level 2: 1.3.2 - Customer Experience Management	**Conformance Scores**
1.3.2.1 - Customer Experience Maturity Assessment	**4.0**
1.3.2.4 - Mapping and Analysis of Experience Lifecycles	**5.0**
1.3.2.4.1 - Select Journey	100%
1.3.2.4.2 - Record Journey	100%
1.3.2.4.3 - Analyze Journey	100%
1.3.2.4.4 - Measure Customer Experience Improvements	100%

4.3 Level 2: 1.3.4 - Customer Management

4.3.1 Mapping Details & Supporting Evidence

The documented mapping information for all Level 3/Level 4 processes in scope for the "1.3.4 - Customer Management" business processes are available from the following link:
https://www.tmforum.org/wp-content/uploads/2017/02/Salesforce-eTOM-1.3.4-CustomerManagement-Mapping-Doc.pdf

Mappings and supporting evidence was presented for the following Level 3 processes:
- 1.3.4.1 - Enable Retention & Loyalty
- 1.3.4.2 - Establish Customer Relationship
- 1.3.4.3 - Re-establish Customer Relationship
- 1.3.4.4 - Terminate Customer Relationship

4.3.2 Detailed Conformance Scores

The following table details the conformance scores awarded to the Level 3 and Level 4 processes submitted in scope for Level 2 process "1.3.4 - Customer Management". The scoring guidelines are explained in Figure 6-1 in Section 6.1.

Note that for Level 3 processes "1.3.4.3 - Re-establish Customer Relationship" and "1.3.4.4 - Terminate Customer Relationship", there is no further decomposition to Level 4 processes. Hence, scores are awarded based on mapping support to the Level 3 process descriptions.

Table 4-3 1.3.4 - Customer Management Conformance Scores

Salesforce solution for omni-channel service in Communications Frameworx 16.0 Business Process Framework Conformance Scores	
1.3 Customer Domain	
Level 2: 1.3.4 - Customer Management	**Conformance Scores**
1.3.4.1 - Enable Retention & Loyalty	**5.0**
1.3.4.1.1 Build Customer Insight	100%
1.3.4.1.2 Analyze & Manage Customer Risk	100%
1.3.4.1.3 Personalize Customer Profile for Retention & Loyalty	100%
1.3.4.1.4 Validate Customer Satisfaction	100%
1.3.4.2 - Establish Customer Relationship	**4.9**
1.3.4.2.1 - Verify Customer	75%
1.3.4.2.2 - Establish New Customer Identity	100%
1.3.4.2.3 - Clean-up & Archive Customer Identifying Information	100%
1.3.4.2.4 - De-duplicate Customer Identity	100%
1.3.4.2.5 - Issue Unique Customer ID	100%
1.3.4.2.6 - Gather Authentication Information	100%
1.3.4.3 - Re-establish Customer Relationship	**5.0**
1.3.4.4 - Terminate Customer Relationship	**5.0**

4.4 Level 2: 1.3.5 - Customer Interaction Management

The documented mapping information for all Level 3/Level 4 processes in scope for the "1.3.5 - Customer Interaction Management" business processes are available from the following link:
https://www.tmforum.org/wp-content/uploads/2017/02/Salesforce-eTOM-1.3.5-CustomerInteractionMgt-Mapping-Doc.pdf

Mappings and supporting evidence was presented for the following Level 3 processes:
- 1.3.5.1 - Create Customer Interaction
- 1.3.5.2 - Update Customer Interaction
- 1.3.5.3 - Close Customer Interaction
- 1.3.5.4 - Log Customer Interaction
- 1.3.5.5 - Notify Customer
- 1.3.5.6 - Track and Manage Customer Interaction
- 1.3.5.7 - Report Customer interaction
- 1.3.5.8 - Authenticate User
- 1.3.5.9 - Customer Interface Management

4.4.1 Detailed Conformance Scores

The following table details the conformance scores awarded to the Level 3 processes submitted in scope for Level 2 process "1.3.5 - Customer Interaction Management". The scoring guidelines are explained in Figure 6-1 in Section 6.1.

Note that for these Level 3 processes, with the exception of "1.3.5.9 - Customer Interface Management", there is no further decomposition to Level 4 processes. Hence, scores are awarded based on mapping support to the Level 3 process descriptions.

Table 4-4 1.3.5 - Customer Interaction Management Conformance Scores

Salesforce solution for omni-channel service in Communications Frameworx 16.0 Business Process Framework Conformance Scores	
1.3 Customer Domain	
Level 2: 1.3.5 - Customer Interaction Management	**Conformance Scores**
1.3.5.1 - Create Customer Interaction	**5.0**
1.3.5.2 - Update Customer Interaction	**5.0**
1.3.5.3 - Close Customer Interaction	**5.0**
1.3.5.4 - Log Customer Interaction	**5.0**
1.3.5.5 - Notify Customer	**5.0**
1.3.5.6 - Track and Manage Customer Interaction	**5.0**
1.3.5.7 - Report Customer interaction	**5.0**
1.3.5.8 - Authenticate User	**5.0**
1.3.5.9 - Customer Interface Management	**5.0**
1.3.5.9.1 - Manage Request (Including Self Service)	100%
1.3.5.9.2 - Analyze & Report on Customer	100%
1.3.5.9.3 - Mediate & Orchestrate Customer Interactions	100%

4.5 Level 2: 1.3.6 - Customer Information Management

The documented mapping information for all Level 3/Level 4 processes in scope for the
"1.3.6 - Customer Information Management" business processes are available from
the following link:
https://www.tmforum.org/wp-content/uploads/2017/02/Salesforce-eTOM-1.3.6-CustomerInformationMgt-Mapping-Doc.pdf

Mappings and supporting evidence was presented for the following Level 3 processes:
- 1.3.6.1 - Create Customer Record
- 1.3.6.2 - Update Customer Data
- 1.3.6.3 - Notify Customer Data Change
- 1.3.6.4 - Archive Customer Data
- 1.3.6.5 - Build a unified customer view

4.5.1 Detailed Conformance Scores

The following table details the conformance scores awarded to the Level 3 processes submitted in scope for Level 2 process "1.3.6 - Customer Information Management". The scoring guidelines are explained in Figure 6-1 in Section 6.1.

Note that for these Level 3 processes, there is no further decomposition to Level 4 processes. Hence, scores are awarded based on mapping support to the Level 3 process descriptions.

Table 4-5 1.3.6 - Customer Information Management Conformance Scores

Salesforce solution for omni-channel service in Communications Frameworx 16.0 Business Process Framework Conformance Scores	
1.3 Customer Domain **Level 2: 1.3.6 - Customer Information Management**	**Conformance Scores**
1.3.6.1 - Create Customer Record	5.0
1.3.6.2 - Update Customer Data	5.0
1.3.6.3 - Notify Customer Data Change	5.0
1.3.6.4 - Archive Customer Data	5.0
1.3.6.5 - Build a unified customer view	5.0

4.6 Level 2: 1.3.7 – Problem Handling

The documented mapping information for all Level 3/Level 4 processes in scope for the "1.3.7 – Problem Handling" business processes are available from the following link: https://www.tmforum.org/wp-content/uploads/2017/02/Salesforce-eTOM-1.3.7-ProblemHandling-Mapping-Doc.pdf

Mappings and supporting evidence was presented for the following Level 3 processes:
- 1.3.7.1 - Isolate Customer Problem
- 1.3.7.2 - Report Customer Problem
- 1.3.7.3 - Track & Manage Customer Problem
- 1.3.7.4 - Close Customer Problem Report
- 1.3.7.5 - Create Customer Problem Report
- 1.3.7.6 - Correct & Recover Customer Problem

4.6.1 Detailed Conformance Scores

The following table details the conformance scores awarded to the Level 3 processes submitted in scope for Level 2 process "1.3.7 – Problem Handling". The scoring guidelines are explained in Figure 6-1 in Section 6.1.

Table 4-6 1.3.7 – Problem Handling Conformance Scores

Salesforce solution for omni-channel service in Communications Frameworx 16.0 Business Process Framework Conformance Scores	
1.3 Customer Domain	
Level 2: 1.3.7 - Problem Handling	**Conformance Scores**
1.3.7.1 - Isolate Customer Problem	**4.8**
1.3.7.1.1 - Verify Product Configuration	75%
1.3.7.1.2 - Perform Specific Customer Problem Diagnostics	75%
1.3.7.1.3 - Perform Specific Customer Problem Tests	75%
1.3.7.1.4 - Notify T&M Root Cause Customer Problem	75%
1.3.7.1.5 - Categorize Customer Problem	100%
1.3.7.1.6 - Identify Root Cause / Check for Workarounds	100%
1.3.7.1.7 - Obtain permanent fix or workarounds	100%
1.3.7.1.8 - Create customer problem restoration plan	100%
1.3.7.1.9 - Create Known record	100%
1.3.7.2 - Report Customer Problem	**5.0**
1.3.7.2.1 - Monitor Customer Problem	100%
1.3.7.2.2 - Distribute Customer Problem Notifications	100%
1.3.7.2.3 - Distribute Customer Problem Management Reports & Summaries	100%
1.3.7.2.4 - Notify Customer Problem	100%
1.3.7.2.5 - Issue Customer Problem Management Summaries	100%
1.3.7.2.6 - Generate Customer Problem Management Reports	100%
1.3.7.3 - Track & Manage Customer Problem	**5.0**
1.3.7.3.1 - Coordinate Customer Problem	100%
1.3.7.3.2 - Cancel Customer Problem	100%
1.3.7.3.3 - Escalate/End Customer Problem	100%
1.3.7.3.4 - Monitor Customer Problem Jeopardy Status	100%
1.3.7.3.5 - Prioritize Customer Problem	100%
1.3.7.3.6 - Escalate Customer Problem to support team	100%
1.3.7.4 - Close Customer Problem Report	**5.0**
1.3.7.4.1 - Contact Customer for Feedback	100%
1.3.7.4.2 - Complete and Validate Customer Problem Report	100%
1.3.7.4.3 - Update Time to Restore Service	100%
1.3.7.4.4 - Finalize Customer Problem Report	100%

1.3.7.4.5 - Communicate Service improvement Opportunity	100%
1.3.7.5 - Create Customer Problem Report	**4.8**
1.3.7.5.1 - Generate Customer Problem Report	100%
1.3.7.5.2 - Obtain Configuration Information	75%
1.3.7.5.3 - Check for major outage	100%
1.3.7.6 - Correct & Recover Customer Problem	
1.3.7.6.1 - Manage Product Restoration	100%
1.3.7.6.2 - Report Product Restoration Results	100%
1.3.7.6.3 - Determine Resolution Feasibility and Justification	50%
1.3.7.6.4 - Implement Customer Problem Workaround	50%
1.3.7.6.5 - Test & Validate Implemented Solution	50%
1.3.7.6.6 - Initiate Change Request	100%
1.3.7.6.7 - Review Major Customer Problem	100%

5 Information Framework Assessment Overview

5.1 Mapping Technique Employed

Not applicable for this assessment.

5.2 Information Framework Assessment - ABE Scope

Not applicable for this assessment.

5.3 Product Scope

Not applicable for this assessment.

6 Frameworx Conformance Result

This Section details the Scores awarded to reflect Conformance of the Salesforce product to the Business Process Framework & Information Framework components of Frameworx 16.0.

6.1 Business Process Framework – Scoring Rules

The conformance scores granted were based on the following TM Forum scoring rules:

Frameworx 16.0 Conformance Certification (Product/Solution/Implementation)		
Business Process Framework (eTOM) - Conformance Score Methodology		
Process Level	**Conformance Score**	**Qualifier**
Level 1 Process	*Not applicable*	*Conformance Assessment shall not be carried out at this process level.*
Level 2 Process	*Not applicable*	*A conformance level is not awarded to Level 2 processes in Frameworx Certification.* *The Certification Report shall highlight the coverage within a Level 2 process submitted in scope for an Assessment, in terms of number of Level 3 processes submitted for assessment out of the total number defined in the Business Process Framework for the Level 2 process.*
Level 3 Process	**Conformance Score is awarded between 3.1 & 5.0**	**The Conformance Score is awarded for each Level 3 process submitted in scope for the Assessment.** **The Conformance Score awarded can be a value between 3.1* & 5 depending on the level of coverage & conformance to the Level 3 process based on the alignment to the level 3 Implied Tasks as decomposed in the Level 4 process definitions. If a Level 3 process has not been decomposed to Level 4 processes, the Level score is awarded according to alignment to the Level 3 defined Implied Tasks.**
Level 4 Process	*Level of conformance is calculated as input to parent Level 3 Process Score*	*Levels of conformance are calculated for Level 4 processes according to alignment to the individual implied tasks. Level 4 scores are summed and averaged to given an overall score for the parent Level 3 process.*
* In earlier Conformance Assessments, scores were awarded to Level 1 & Level 2 processes using values 1 through to 3. For this reason, the Level 3 scores start from > 3.		

Figure 6-1 TM Forum Business Process Framework: Conformance Scoring Rules

Additional Notes on Business Process Framework Conformance Scoring

1. Level 1 processes shall be presented to define the assessment scope only. i.e. they shall not be assessed as self-contained processes since the level of detail is not considered sufficient.
A conformance level shall not be awarded for Level 1 processes.

2. Level 2 processes shall be presented to define the assessment scope only. i.e. they shall not be assessed as self-contained processes since the level of detail is not considered sufficient.
A conformance level shall not be awarded for Level 2 processes. However, the Certification Report shall provide good indication of the coverage of the Level 2 process in terms of number of contained Level 3 processes submitted in scope for the Assessment.

3. The Conformance Assessment shall be carried out at process level 3. For each Level 3 process, conformance shall be deduced according to the support for the process implied tasks, as decomposed and described in the underlying Level 4 process descriptions. The score awarded for a Level 3 process, is deduced according to the support mapped to the Level 4 processes/Implied Tasks. This provides finer granularity of scoring than in Assessment prior to Frameworx 12.0 based Assessments.

4. In evaluating conformance to the standards, manual intervention shall not impact the conformance score granted. However, any level of manual support shall be noted in the Conformance Report and Detailed Results Report. This note specifically applies to Product & Solution Assessments.

5. Processes that are supported via manual implementation only, are not considered in scope for the Assessment. This note specifically applies to Product & Solution Assessments.

6.2 Business Process Framework – Conformance Result Summary

The graph in this Section provides an overview of the conformance levels granted to the Level 3 Processes presented in scope for the Salesforce Assessment. Each Level 3 process was measured using a Business Process Framework (eTOM) conformance score according to level of Conformance – Full Conformance or Partial Conformance as described in Section 6.1 Business Process Framework – Scoring Rules.
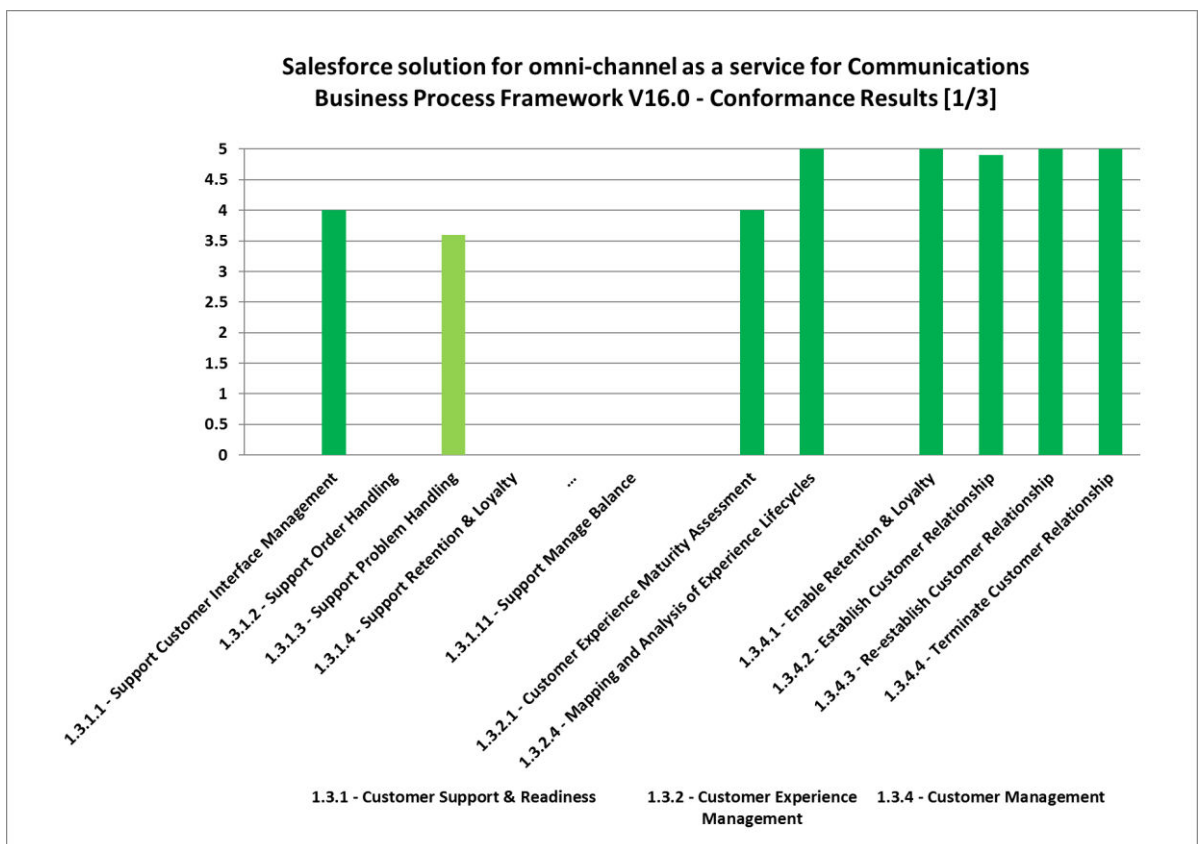
Figure 6-2 Business Process Framework: Conformance Results [1/3]
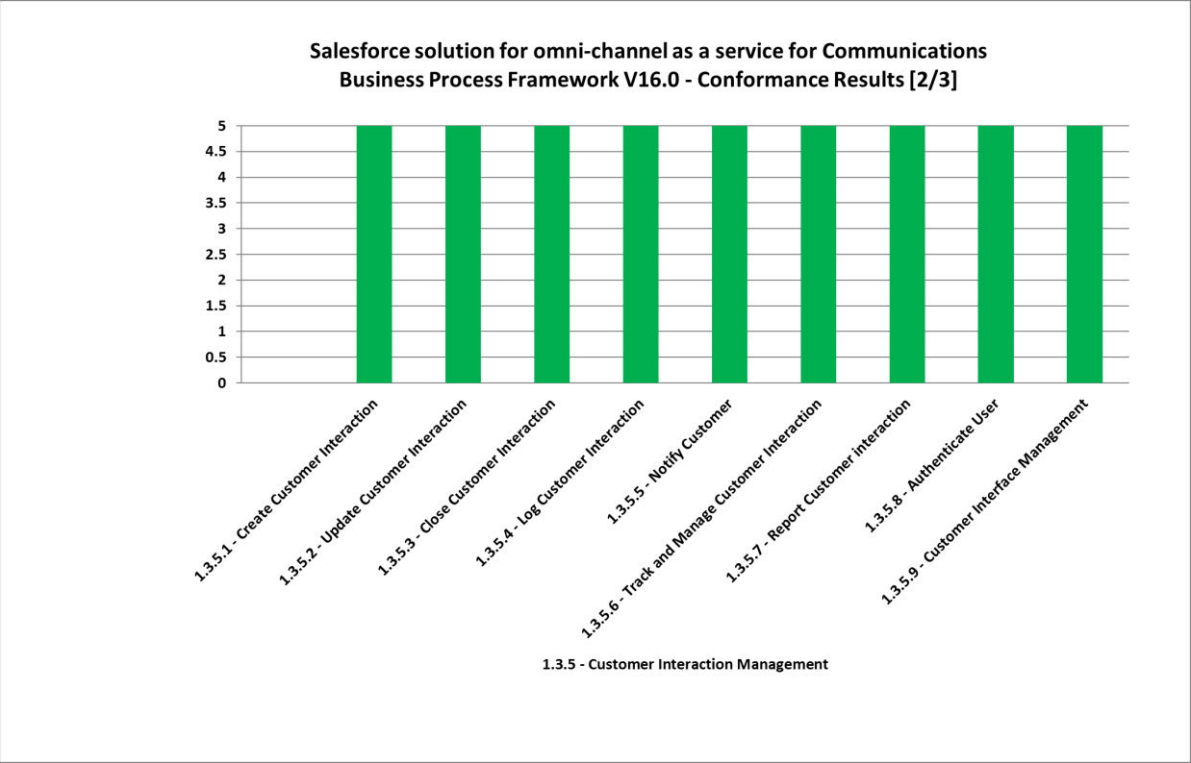
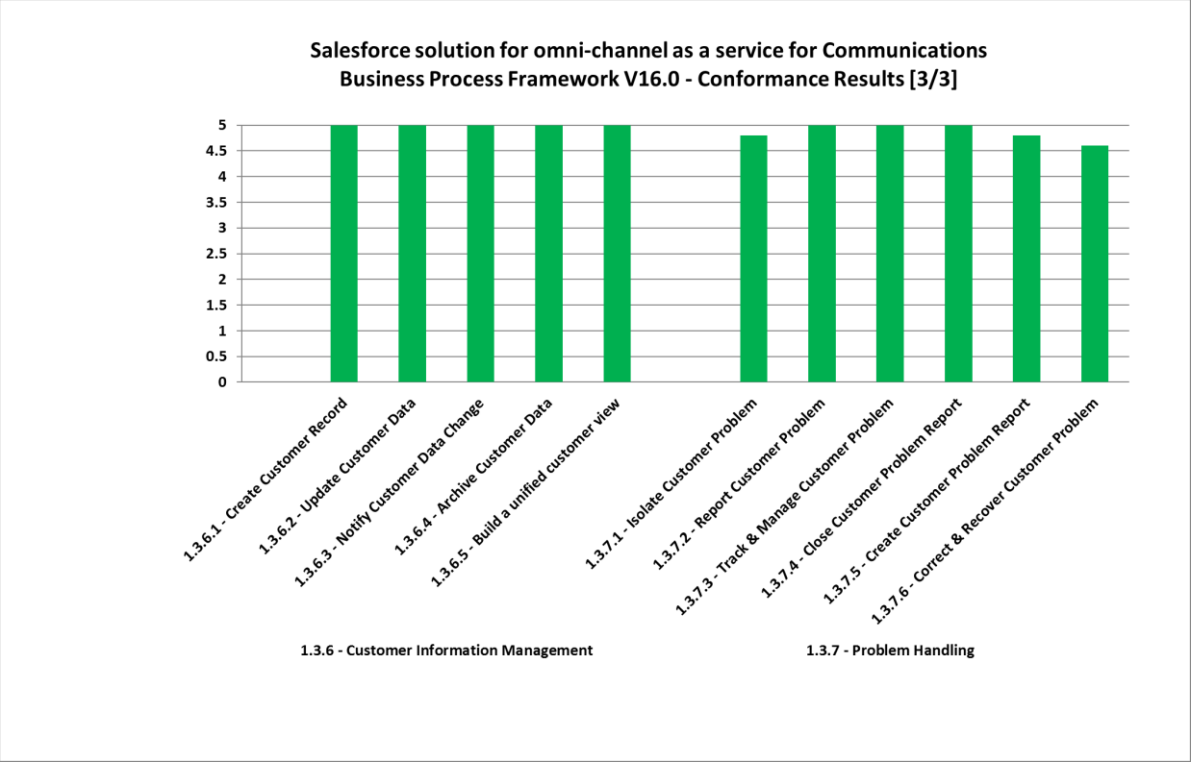**Figure 6-3 Business Process Framework: Conformance Results [2/3]**

Figure 6-4 Business Process Framework: Conformance Results [3/3]

6.3　Business Process Framework – Detailed Conformance Results

The following table provides a more detailed breakdown of the scores awarded with some additional commentary.

Table 6-1 Business Process Framework: Detailed Conformance Results

Salesforce solution for omni-channel service in Communications Frameworx 16.0 Business Process Framework Conformance Scores		
L1 / L2 / L3 Process	**L3 Process Score [L2 Coverage]**	**Comments**
Customer Domain		
1.3.1 - Customer Support & Readiness	**[2/11]**	
1.3.1.1 - Support Customer Interface Management	**4.0**	**Partially Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM) but with some deviations. See detailed Level 3/Level 4 results section in Chapter 4 of Certification Report. *NOTE: Level 4 process "1.3.1.1.2 - Undertake Customer Contacts Trend Analysis" was not submitted for assessment as deemed not part of the Salesforce solution under assessment. Level 4 process "1.3.1.1.1 - Ensure Customer Interface Capability" is 100% conformant.*
1.3.1.2 - Support Order Handling	*Not in Scope*	*This process was not submitted for assessment.*

1.3.1.3 - Support Problem Handling	**3.6**	**Partially Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM) but with some deviations. See detailed Level 3/Level 4 results section in Chapter 4 of Certification Report. *NOTE: Seven of the ten Level 4 processes specified under this Level 3 process were not submitted for assessment as deemed not part of the Salesforce solution under assessment. The three Level 4 processes submitted, are 100% conformant.*
1.3.1.4 - Support Retention & Loyalty	*Not in Scope*	*This process was not submitted for assessment.*
1.3.1.5 - Manage Customer Inventory	*Not in Scope*	*This process was not submitted for assessment.*
1.3.1.6 - Support Bill Invoice Management	*Not in Scope*	*This process was not submitted for assessment.*
1.3.1.7 - Support Bill Payments & Receivables Management	*Not in Scope*	*This process was not submitted for assessment.*
1.3.1.8 - Support Bill Inquiry Handling	*Not in Scope*	*This process was not submitted for assessment.*
1.3.1.9 - Support Charging	*Not in Scope*	*This process was not submitted for assessment.*
1.3.1.10 - Support Manage Billing Events	*Not in Scope*	*This process was not submitted for assessment.*
1.3.1.11 - Support Manage Balance	*Not in Scope*	*This process was not submitted for assessment.*
1.3.2 - Customer Experience Management	**[2/2]**	
1.3.2.1 - Customer Experience Maturity Assessment	**4.0**	**Partially Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process

		Framework (eTOM) but with some deviations. See detailed Level 3/Level 4 results section in Chapter 4 of Certification Report.
1.3.2.4 - Mapping and Analysis of Experience Lifecycles	5.0	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.4 - Customer Management	**[4/4]**	
1.3.4.1 - Enable Retention & Loyalty	5.0	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.4.2 - Establish Customer Relationship	4.9	**Partially Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM). *NOTE: Five of six L4 processes specified are 100% conformant. Level 4 process "1.3.4.2.1 - Verify Customer" has a minor deviation. See detailed Level 3/Level 4 results section in Chapter 4 of Certification Report.*
1.3.4.3 - Re-establish Customer Relationship	5.0	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).

1.3.4.4 - Terminate Customer Relationship	**5.0**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.5 - Customer Interaction Management	**[9/9]**	
1.3.5.1 - Create Customer Interaction	**5.0**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.5.2 - Update Customer Interaction	**5.0**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.5.3 - Close Customer Interaction	**5.0**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.5.4 - Log Customer Interaction	**5.0**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).

1.3.5.5 - Notify Customer	**5.0**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.5.6 - Track and Manage Customer Interaction	**5.0**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.5.7 - Report Customer interaction	**5.0**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.5.8 - Authenticate User	**5.0**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.5.9 - Customer Interface Management	**5.0**	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).

1.3.6 - Customer Information Management	[5/5]	
1.3.6.1 - Create Customer Record	5.0	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.6.2 - Update Customer Data	5.0	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.6.3 - Notify Customer Data Change	5.0	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.6.4 - Archive Customer Data	5.0	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.6.5 - Build a unified customer view	5.0	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).

1.3.7 - Problem Handling	[6/6]	
1.3.7.1 - Isolate Customer Problem	4.8	**Partially Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM) but with some deviations. *NOTE: Five of nine L4 processes specified are 100% conformant. The other four Level 4 processes have minor deviations. See detailed Level 3/Level 4 results section in Chapter 4 of Certification Report.*
1.3.7.2 - Report Customer Problem	5.0	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.7.3 - Track & Manage Customer Problem	5.0	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).
1.3.7.4 - Close Customer Problem Report	5.0	**Fully Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM).

1.3.7.5 - Create Customer Problem Report	**4.8**	**Partially Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM) but with some deviations. See detailed Level 3/Level 4 results section in Chapter 4 of Certification Report.
1.3.7.6 - Correct & Recover Customer Problem	**4.6**	**Partially Conformant** Supporting evidence and documentation submitted for the assessment of this level 3 process fulfilled alignment criteria with the standard Business Process Framework (eTOM) but with some deviations. See detailed Level 3/Level 4 results section in Chapter 4 of Certification Report.

6.4 Information Framework – Scoring Rules

Not applicable for this assessment.

6.4.1 Information Framework Maturity Conformance Scoring Methodology

Not applicable for this assessment.

6.4.2 Information Framework Adoption Conformance Scoring Methodology

Not applicable for this assessment.

6.5   Information Framework – Conformance Result Summary

Not applicable for this assessment.

6.5.1   Information Framework - Maturity Conformance Result Summary

Not applicable for this assessment.

6.5.2   Information Framework - Adoption Conformance Result Summary

Not applicable for this assessment.

6.6 Information Framework – Detailed Conformance Result

Not applicable for this assessment.