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SIGNATURE SUCCESS PLAN

Achieve your critical data and *Agentforce* goals together with a proactive, personalized partnership.

Meet the Signature Success Plan

In the world of business, it's important to make smart decisions quickly and feel supported along the way. That's why we focus on helping our customers succeed from the start. The Signature Success Plan was created to ensure that your business operations are efficient, easy to manage, and adaptable, setting you up for lasting success and long-term growth.

You can expect the highest level of innovative tools, guidance, and support with features such as:

· A designated Customer Success Manager (CSM)

· The Customer Success Score for insights and recommendations

· Specialized Architect Reviews

· Proactive Monitoring and Key Event Management

· The fastest response times from our highly skilled Technical Support engineers

Developed from over 25 years of proven best practices, Signature will help you get the most from Salesforce.

80%
fewer timeout errors

AUTODESK
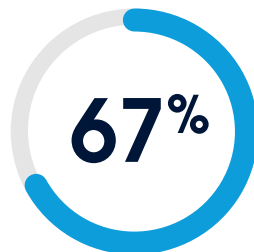
67%
system performance improvement

DELL Technologies

50%
decrease in end-user disruptions

WELLS FARGO

"With the Customer Success Score, our team is looking for better visibility to the adoption of the technology and planning work with our designated expert so we'll be able to partner to make the most of the Salesforce platform."

Stephen Berkowitz, Manager, Salesforce Technology Program, Southwest

Get the most value from Salesforce with a team of experts dedicated to your success every day

Partner with our top experts and use innovative tools like the Customer Success Score and Proactive Monitoring to stay agile.

Enhance your strategy to confidently drive adoption and AI innovation

Partner with your Customer Success Manager to develop an ongoing Success Path based on AI-driven recommendations from your Customer Success Score. Enhance your team's ability to use Agentforce effectively with included instructor-led training and industry best practices from Salesforce experts.

Design an effective and scalable platform backed by data and insights

Engage in Technical Health Reviews to develop Agentforce solutions that deliver fast outcomes and evolve with your business. Improve speed and stability with Specialized Architect Reviews as you scale your business with AI agents. Continually discover new ways to improve Salesforce efficiency with proactive guidance from your CSM.

Anticipate and resolve issues with highly skilled technical experts at Salesforce

Prepare for key AI initiatives, like deploying Agentforce, and minimize disruptions with 24/7 Proactive Monitoring, Event Management, and 15-minute response times from our top technical support specialists. Speed up development with robust developer code reviews for up to 5000 lines of code.

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AUTODESK

"Proactive Monitoring finds issues before they impact the customer – and that's the main goal."

Ram Eragamreddy, Director of Engineering, Autodesk

Leader WINTER 2025

Clients Love Us
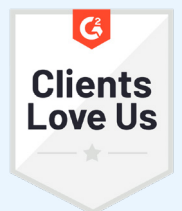
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Signature Success Plan Features

Here are some of the Signature features our customers use to achieve their ambitious goals with Salesforce.

104%

Return on Investment (ROI) for Signature customers incremental to the Premier Success Plan ROI*

[Get the study]

Customer Success Manager

Your single point of contact and advocate, who delivers proactive expertise and personalized recommendations, and engages with technical resources to address your in-depth product and Agentforce needs at every step of your journey.

Customer Success Score

Measure your progress across product adoption, customer expertise, and technical health with insights and AI-driven recommendations.

Success Path

Track objectives and goals with a roadmap that ensures clarity on how to achieve your desired outcomes in building expertise, driving product adoption, and maintaining technical health.

Success Review

Review past recommendations and achievements with your Customer Success Manager up to four times per year. Success Reviews foster joint accountability, realignment of your goals, and next steps for your success.

Proactive Monitoring

24/7 monitoring and customized Smart Alerts tailored to your business needs, ensuring you stay informed of the most critical insights.

Specialized Architect Reviews

Work with in-house Salesforce architects to review, maintain, and enhance your Salesforce solution and Agentforce configuration, resolving design challenges and uncovering opportunities for maximum technical health and business scalability.

Key Event Management

Prepare for events and peak times like holidays, go-live events, and Salesforce technical releases with technical guidance.

Health Checks & Assessments

Ensure your teams continue to use Salesforce effectively with Org Health Org Health Checks.

Expert Coaching

Enable your teams with specialized one-to-one engagements. Access video tutorials, 90-minute Virtual Interactive Workshops, and personalized individual sessions on any topic of your choice with Salesforce experts.

*The Total Economic Impact™ Of the Salesforce Signature Success Plan, a commissioned study conducted by Forrester Consulting on behalf of Salesforce, September 2024. Results are for a composite organization representative of interviewed customers.

Signature Success Plan Features (continued)

Annual Technical Health Review

Get a comprehensive analysis of your Agentforce environment with recommendations to minimize errors and inefficiencies for a lasting, healthy solution.

Onboarding

Meet your Customer Success Manager and in the first 30 days get started with Signature. Attend several personalized workshops including: Proactive Services and Monitoring setup, Support and Incident Management procedures, and Key Event Management planning. Establish a recurring cadence with your CSM to work toward important projects and upcoming milestones.

Instructor-led Training

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

Bulk Certification Discounts

Get 35% discounts for bulk certifications.

Trailblazer Community

Join Community Groups, ask questions, learn from fellow Trailblazers who have built agents, and grow your professional network.

Trailhead

Get practical experience and learn at your own pace with our free online learning platform.

Salesforce Help

Ask questions and get answers fast from Agentforce on Help, how-to videos, documentation, knowledge articles, release notes, and more.

Developer Support

Troubleshoot up to 5,000 lines of custom code with our Salesforce experts to help you resolve any developer challenges.

Technical Support

Get help 24/7/365 from our Technical Support team through Agentforce on Help, chat, phone, case submission, and an emergency call number. Critical business-stopping cases have a 15-minute response time with 30-minute updates.

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Success Plans Feature Comparison Chart
Find the right level of guidance and support to reach your goals faster.

View details on included and excluded products

		Standard	Premier *Includes Standard features*	Signature *Add on top of Premier Success Plan* *Includes Premier and Standard features*
Value Acceleration	Customer Success Manager			✓
	Customer Success Score[2]		✓	✓
	Success Path		✓	✓
	Success Review		Up to 2x per year	Up to 4x per year
Technical Health	Proactive Monitoring[2]			✓
	Specialized Architect Reviews[2]			✓
	Key Event Management[2]			✓
	Annual Technical Health Review			✓
	Health Checks and Recommendations		✓	✓
Product Adoption	Onboarding[2]		✓	✓
	Expert Coaching		✓	✓
Customer Expertise	Workshops (60 - 90 Minutes)		✓	✓
	Courses (1 - 5 Days)		25% Discount	✓
	Bulk Certifications		25% Discount	35% Discount
	Trailhead	✓	✓	✓
	Trailblazer Community	✓	✓	✓
	Knowledge Articles and Documentation	✓	✓	✓
Issue Resolution	Developer Support		200 lines of code review	5,000 lines of code review
	DORA Support (Digital Operational Resilience Act)	Available for purchase	✓	✓
	Technical Support	• **Live help via:** Help Agent and chat • **Case submission response:** 2 days during local business hours	• **Live help via:** Help Agent and chat, and phone • **Case submission response:** 24/7/365, 1 hour response for business-stopping issues	• **Live help via:** Help Agent and chat, phone and emergency hotline • **Case submission response:** 24/7/365, 15- and 30-minute updates for business-stopping issues
		Included	**30% of Net** *(or included in UE & E1E)*	**Custom**

(Left vertical label: Help Agent[1])

For more information

Contact your account executive to learn how we can help you fast-track your success today.

1-800-NO-SOFTWARE

www.salesforce.com

The Help Agent may include references to features that are still in development. Customers should make purchasing decisions based on features that are available today.[1]

Currently available for select Clouds[2]