Jadu CXM Service
Definition

Customer Experience & Case Management, Jadu CXM by Methods
Jadu CXM

Jadu CXM is a web-based customer experience management service for customer case resolution. Jadu CXM lets your customers interact with you to solve their issues and provides them updates about their case. Jadu CXM is suitable for handling different types of customer interactions such as complaints, disputes, requests, applications, subscriptions and more.

Jadu CXM makes it easy for your staff to serve customers through online and offline channels with a simple, intuitive user interface. Customers, staff members and third parties share the same view of a case where they can collaborate in real-time, and view a full timeline history of the case.

Jadu CXM is a ‘no code’ service, designed to enable business users to own and manage service design without the need for any programming. Jadu CXM seamlessly connects with the Jadu Continuum platform meaning that a customer can go to your website, complete a web form which is received as a case by a staff member and receive updates through to resolution as one seamless experience.

Benefits to you and your customers

- Provides organisations with the self-sufficiency to design, develop, deploy and manage digital services in real time without reliance on the supplier. Business users own and manage configuration and rules
- No programming required
- Build and update services faster using a simple UI
- Promotes channel shift and customer self-service
- A responsive interface enables cases to be managed on any device, at any time
- Automate manual processes – enables automation of notifications, escalations and assignment of tasks either within your organisation; with the customer; and with external suppliers who deliver services on your behalf. All notifications and escalations are rules based entered via a non-technical web interface and can be email, SMS or paper based.
- Focus your agents’ time on higher value activities
- Improve customer satisfaction through better communication and updating
- Puts the customer in control of the data entered for a service. This can trigger actions by line of business systems through automated notifications and integrations – building human-machine collaboration in a language that both can understand
- Uses cloud technology removing the iron chains of on-premise infrastructure and provides the agility to rapidly scale or move solution (not that you will want too!)
- Secure hosting at OFFICIAL level under Government Security Classification Policy (GSCP)
Key features of Jadu CXM

Jadu CXM leverages the power of the Jadu Continuum platform to provide a secure, configurable case management and customer experience solution.

- A timeline view of a customer’s case
- Real-time messaging and case updates
- Single view of a customer record and history
- Customer cases created from Jadu forms on your website
- User friendly interface to configure workflow, rules and notifications
- Set-up time based rules and SLAs
- Mobile and device friendly
- Robust access model
- MI reporting
- Generate letters from online cases
- Is entirely API (Application Programming Interface) based. This means that as long as your line of business system can pull and push updates via a web service, then CXM can integrate with that existing software solution.

So What is CXM? Why is it Different?

CXM is Customer Experience Management.

CXM is the progression from the traditional CRM focus on data management to the delivery of consistent customer experiences that delight customers through the design of processes and outcomes from the customer’s perspective (think outside-in rather than inside-out).

This transposition of focus provides organisations with the capability to deliver customer information across channels and devices at the exact time and location where it can be leveraged to positively affect customer experiences.

CXM provides a customer centric view / snapshot of all interactions a customer has with an organisation and enables the customer to interact directly with an organisation; with both customer and organisation having the same view of information; both being able to comment, track progress, raise concerns and view/upload digital assets as required. It can also surface information stored in legacy line of business systems to the customer.

CXM firmly puts the CUSTOMER FIRST. It is the removal of the concept of a hidden back-office. There is transparency between customer and organisation - building up the relationship of trust.
How is CXM Implemented in organisations?

Jadu recommend a three stage approach to implementation. Professional services to deliver CXM implementations will be delivered by either Jadu consultants or certified partners. The three stages are:

- **Stage 1**: First Case Type. Delivered by Jadu/certified partner as you observe our analysis processes and learn how to develop your own workflows for other services using the tools.
- **Stage 2**: Second Case Type. Delivered by you and supported by Jadu/certified partner.
- **Stage 3**: Other Case Types. You’re flying solo! Jadu/certified partner will be available to support and assist if required. By stage 3 you will be expert in designing and implementing your own workflows for delivering exceptional customer experiences.

User interface examples

Case list interface for case managers

A personalised case list interface presents cases that require attention and powerful filters help you find cases based on different criteria.
A case timeline provides a single view of a case with all information in one place. Messages, automated status updates, notes and file attachments are visible to the customer, your staff and third parties based on their access levels.
View on any device

CXM is web based and fully responsive meaning that users can view cases from their desktop, tablet, kiosk or mobile.

Pricing

Service package

<table>
<thead>
<tr>
<th>Environment</th>
<th>Licensed Users **</th>
<th># of Free Users</th>
<th>Storage with subscription</th>
<th>Monthly Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIVE</td>
<td>£50 per month per user</td>
<td>Unlimited</td>
<td>250 GB</td>
<td>n/a</td>
</tr>
<tr>
<td>SANDBOX</td>
<td>Unlimited</td>
<td>Unlimited</td>
<td>10 GB</td>
<td>£250</td>
</tr>
</tbody>
</table>

All costs quoted are exclusive of VAT.

** Minimum number of licensed users for a subscription is 20 (10 for first six months of a new implementation). Incremental bundles of 5 licenses can be purchased as required. Tiered pricing is available for orders over 250 licensed users.

A licensed user (granular role permissions segregate the following as required by the organisation) can:

- Create and amend new services, workflow rules & notifications
- View, create or amend customer records
- Access reporting and KPI information

A free user can:

- Create, edit or update a case
- Create a customer account/record and amend their own personal details via registration and use of the Jadu MyAccount

**Additional Storage Costs**

You get 250 GB of storage with a subscription. Additional storage when required is £0.30 per GB per month. Sandbox environments are limited to 10GB of storage.

**Optional additional modules**

**Jadu Hub Integration Server (HUBis)**

The Jadu HUB Integration Server product is required in cases where the customer has an externally hosted and managed CMS/XFP environment or has a CXM tenant space either of which requires to integrate with a back office hosted system such as Idox Uniform. In such cases, HUB Integration Server provides a common interface for integrating with these third-party products. Jadu HUB integration Server is available on subscription via GCloud.

<table>
<thead>
<tr>
<th>Description</th>
<th>Monthly subscription</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jadu HUB Integration Server - hosted by Customer</td>
<td>£500</td>
</tr>
<tr>
<td>Jadu HUB Integration Server - cloud hosted by Jadu</td>
<td>£800</td>
</tr>
</tbody>
</table>

The monthly cost includes instances of the integration hub server for both live and test settings. Alternatively a single cloud VM can host a single instance of Jadu integration hub server which can accept configuration for both test and production settings.

**Singlepoint by Aligned Assets**

You'll need an NLPG-based address lookup service for CXM. if you do not already use either Singlepoint / ESRI LocatorHub we can provide this via subscription.

<table>
<thead>
<tr>
<th>Description</th>
<th>Initial setup</th>
<th>Annual support</th>
</tr>
</thead>
<tbody>
<tr>
<td>AddressBase Premium for NLPG data (hosted)</td>
<td>-</td>
<td>£6,000</td>
</tr>
<tr>
<td>Annual service including 6-weekly change-only updates, all patch releases and upgrades and standard changes</td>
<td>-</td>
<td>£6,000</td>
</tr>
</tbody>
</table>
Customer Experience and Case Management, Jadu CXM by Methods Service: G-Cloud 10

LLPG (hosted)
Annual service includes either daily or weekly change-only updates, all patch releases and upgrades and standard changes

<table>
<thead>
<tr>
<th></th>
<th>£1,500</th>
<th>£3,000</th>
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</table>

Bundled AddressBase Premium full GB and LLPG hosted
Annual service including 6-weekly change-only updates for ABP and either daily or weekly change-only updates for LLPG, all patch releases and upgrades and standard changes

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<thead>
<tr>
<th></th>
<th>£1,500</th>
<th>£8,000</th>
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</table>

On-premise solutions are also available; contact Aligned Assets directly for more information.

**Premium integration costs**

As part of the Jadu Continuum platform, standard integrations with common line of business systems are developed and released as part of the core software platform, and become available to all customers to use.

In some cases professional services may be required for implementation of an integration, which we can provide through our Cloud Support G-Cloud service. A small number of premium integrations attract an additional support cost.

**Capita Pay 360 Direct Debits**

<table>
<thead>
<tr>
<th>Description</th>
<th>Initial setup</th>
<th>Annual support</th>
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</thead>
<tbody>
<tr>
<td>Capita Pay360 Integrations Hub Connector</td>
<td>£1,000</td>
<td>£2,000</td>
</tr>
<tr>
<td>Configure and test integration with Capita Pay 360 Direct Debits</td>
<td></td>
<td></td>
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</tbody>
</table>

**Northgate Revs & Bens Portal**

<table>
<thead>
<tr>
<th>Description</th>
<th>Initial setup</th>
<th>Annual support</th>
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</thead>
<tbody>
<tr>
<td>Northgate Public Services CA-B and CA-R Single Sign-On Integrations Hub Connector</td>
<td>£6,000</td>
<td>£1,000</td>
</tr>
<tr>
<td>Configure and test integration with Northgate Portal @ £1,000/day</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Pitney Bowes Confirm connector**

<table>
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<tr>
<th>Description</th>
<th>Initial setup</th>
<th>Annual support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pitney Bowes Confirm Integrations Hub Connector</td>
<td>£6,000</td>
<td>£1,000</td>
</tr>
<tr>
<td>Configure and test integration with Pitney Bowes Confirm @ £1,000/day</td>
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</tbody>
</table>
mygov.scot premium authentication adaptor

<table>
<thead>
<tr>
<th>Description</th>
<th>Initial setup</th>
<th>Annual support</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>mygov.scot myaccount Single Sign-on Integrations Hub Connector</em></td>
<td>£6,000</td>
<td>£6,000</td>
</tr>
<tr>
<td>Configure and test connectivity @ £1,000 per day</td>
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</tr>
</tbody>
</table>

**Non-Hub integrations**

If the Line of Business system is a mainstream back office package that is widely used across our customer base, Jadu will co-fund the software engineering costs of integration (excluding consultancy), on the basis that this integration is not specific to the needs of one customer and can be rolled into the core product so it can be shared through the Jadu Continuum Integrations Hub.

Jadu can integrate with line of business systems as a first service delivery and should integration with a line of business system (for example a waste services provider) be required in the pilot service then there will be two days @ £1,000 per day to scope and write a technical specification based quote for the customer to determine if they wish to proceed with the development.

**Technical overview**

**Where is the data stored?**

Jadu CXM is hosted on a UK based assured cloud platform, designed and optimised by Jadu to meet the unique information assurance needs of UK public sector organisations.

Within Jadu CXM all personal information including user and customer passwords are securely encrypted. When an individual signs up online for an account a click through email is required to confirm and validate their registration. There is an automatic time-out of the service if the browser is inactive for 15 minutes.

**Jadu HUB Integration Server**

The Jadu HUB Integration Server product is required in cases where the customer has an externally hosted & managed CMS/XFP environment or has a CXM tenant space either of which requires to integrate with a back office hosted system such as Idox Uniform. In such cases, HUB Integration Server provides a common interface for integrating with these third-party products. Jadu HUB integration Server is available on subscription via GCloud.

**Recovery of Data**
Jadu CXM has been designed to be disaster tolerant. The service is in a highly resilient environment achieved through continuous real-time replication of live VMs to a second data centre. The resulting RTO and near-zero RPO help customers with their disaster avoidance plans. Synchronous replication ensures data is always available at both data centres.

**Connectivity and network capacity**

Internet connectivity is provided via multiple links to Tier 1 bandwidth providers, which enables us to guarantee 99.9% service availability.

**Data centre security**

Multiple levels of security are employed in order to ensure that only data centre Operations Engineers are allowed physical access to routers, switches and servers.

**Anti-virus protection**

A managed anti-virus solution provides real-time protection against viruses, worms, trojans, spyware, malicious behaviour and root kits, with automatic updates to ensure protection against the very latest threats.

**Support for CXM**

Within CXM the organisation who has taken a subscription is responsible for the delivery of first line support to:

- Create users and reset passwords
- Activate online accounts for customers
- Reset customer passwords
- Create / update notifications by email, letter, SMS
- Set Service Level escalations based on date rules
- Create / amend workflows, case statuses, case transitions
- Create / maintain roles for users and user groups

None of the above require assistance from Jadu CXM support. Should Jadu CXM support be required then this will be charged as professional services provided as either consultancy or training to help enable the organisation to become self-sufficient.

When an incident is reported that impacts any third party integration then Jadu will work with the organisation and the third party provider of the line of business system to rectify the issue. If the issue has been caused by a change to the configuration of the third party system that has not been
communicated to Jadu then professional services will be charged to update the integration if required.

Issues with Line of Business systems themselves; customer payment solutions; and non-Jadu Continuum powered websites remain the sole responsibility of the organisation that has taken the subscription.

**Service Levels**

Jadu support is available 24/7 to raise a support ticket through our own CXM portal. Jadu support desk is available during normal service hours of 08:00 - 18:00 GMT Monday to Friday (except for Public Holidays in England). If additional support is required outside of these times then an additional subscription charge may be applied.

Jadu will endeavour to achieve the following response and resolution times during normal service hours:

<table>
<thead>
<tr>
<th>Severity</th>
<th>Description</th>
<th>First Response</th>
<th>Target Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>System Unavailable</td>
<td>15 minutes</td>
<td>8 hours</td>
</tr>
<tr>
<td>2</td>
<td>System available but either:</td>
<td>30 minutes</td>
<td>2 working days</td>
</tr>
<tr>
<td>1. core functionality within CXM is not working and</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Multiple users are affected</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Issue with functionality of the service however does not prevent users using the system (e.g. integration errors)</td>
<td>60 minutes</td>
<td>4 working days</td>
</tr>
<tr>
<td>4</td>
<td>Issue exists but does not prevent processing of task (e.g cosmetic bug)</td>
<td>60 minutes</td>
<td>Next Sprint</td>
</tr>
</tbody>
</table>

**Other information**

**Open standards**

Jadu CXM uses a number of open standards. Content is delivered over standard web protocols using HTML and CSS, and is designed to comply with WAI WCAG standards for accessibility.

**Extensibility**

Rich APIs enable deep integration with existing services. Typically this would include extending web sites to create new, digital by default channels of communication with customers but also allows for deep integration with back office systems.
Client side requirements

Your customers will access Jadu CXM over an Internet connection, using the web browser on their preferred device. These are the only client-side requirements for your customers; no browser plug-ins or additional client software are required.

Administrative access to the solution is via a web browser over an Internet connection. There is no requirement for browser plug-ins or additional client software, and the following web browsers are supported:

- Internet Explorer 9+
- Google Chrome (current version)
- Firefox (current version)
- Safari (current version)

Some features of the Control Centre may not be available in other browsers.

Accreditations

Jadu are accredited with ISO 27001 for information security and have a robust organisation-wide Information Security Management System. The ISO 27001 accreditation is subject to continuous review and a programme of both internal and external audits to ensure on-going compliance.

Data and information management is compliant with the EU Data Protection Directive and makes provision for the policy recommendations of the Safe Harbour agreement in terms of notification of data gathering and data integrity and security assurance.

Reporting and statistics

Standard reports on case volumes are available as dashboard reports. All case data can be exported to csv and reported on.

Service management

Jadu CXM’s subscription model removes impractical barriers and offers flexibility in terms of service initiation and termination.

- On-boarding: to sign up to Jadu CXM, please contact Jadu
- Ordering and invoicing process: your monthly subscription is billed in advance, on a 6- or 12-month cycle. You will need to supply a Purchase Order number; you will be invoiced for your monthly subscription, with payment due within 30 days by bank transfer
- Off-boarding: you can cancel individual service plans at any time. When you do this, your Jadu CXM portal becomes offline immediately and no further subscription charges will apply. You will have access to your data for a further 30 days
Service information

Jadu CXM is open to G-Cloud buyers, and any organisations wishing to use the service as part of supply through G-Cloud.

- **Termination costs:** there are no termination costs for Jadu CXM
- **Data extraction costs:** there are no costs for data extraction. If you require Jadu assistance for data extraction then Jadu professional services will be charged
- **Aggregated billing:** aggregated billing can be provided for multiple Jadu CXM accounts, and for multiple Jadu Continuum cloud services
- **Terms of service:** your use of Jadu CXM is subject to the Jadu Continuum Cloud Terms of Service. By signing up to the service you agree to acceptance of these Terms of Service
- **Termination:** you can choose to terminate your use of Jadu CXM at any time. No termination charges are payable, however, any outstanding charges must be paid in full at the time of termination. Full termination terms are given in the Jadu Continuum Cloud Terms of Service
- **Support levels:** support response and resolution levels are given in the support SLA
- **Usage and availability:** service availability is guaranteed at 99.9%, subject to a current subscription being held
- **Planned service changes and deprecated features:** deprecation of functionality and features will be outlined in service updates available through the Jadu Supportal site and communicated directly to subscribers. Planned maintenance, including rolling out of new features, will be carried out in a maintenance window that is detailed in the Terms of Service. Unplanned maintenance may be carried out at other times, with at least 6 hours' notice provided except in cases of urgent issues, which require immediate attention. New functionality will be communicated in the same way, and users can also view the Jadu CXM roadmap within the Jadu Supportal site for an outline of functional changes under consideration

Training

Training for Jadu CXM is provided through a range of channels including short, task-based video tutorials and scheduled webinars focussing on broader strategic topic areas. Administrator training is conducted on client site.

Caching

Jadu CXM makes use of local caching on the web and database servers for increased performance.

Additional Customer Responsibilities

The customer is responsible for the following:
- Provision of API and business process documentation for Line of Business systems to be integrated with
- Provision of APIs to both Test and Live instances of Line of Business systems.
- Test data for integration testing
- Management of line of business solutions
- Providing Jadu will at least 60 days notice when integrated line of business systems are upgraded
- Remote access to Line of Business Systems

Data processing
Data processing may be carried out by employed and contracted staff working for Jadu Ltd and our subsidiaries including Spacecraft Creative Ltd. In addition to this, the following entities are subcontractors who act as sub processors and may process personal data outside the EEA, either themselves or through their subcontractors:

- Rackspace Ltd.
- UK Cloud Ltd.
- Amazon Web Services UK Ltd.
- The Positive Internet Company Ltd.
- Imperva UK Ltd.
- Alert Logic UK Ltd.
- Cloudflare Inc.
- Mailgun Technologies, Inc.

Our customers’ consent will be sought for the use of any additional named subcontractors who are to act as sub-processors, as and when required.