Service Description

Introduction

Circle Interactive is a creative digital agency based in Bristol. We specialise in helping organisations large and small work better with their websites and contact management using the best Open Source products: Drupal and CiviCRM.

Drupal is an Open Source content management system (CMS) widely used by public, private and third sector organisations. It is a secure, powerful CMS with strong user management tools.

CiviCRM is an Open Source contact relationship management system (CRM) used by about 11,000 organisations around the world to track service delivery, contact interaction history, event management, engagement, grant applications and much more.

Due to their modular designs, both systems are scalable and future proof. Our service involves deployment of a Drupal or CiviCRM instance to an appropriate cloud environment based on an assessment of your requirements now and planned growth in the future. We will help you find the cost effective method for deploying and running your software and will support your users with training and a ticketed support service.

We base all of our carefully thought-through solutions on a thorough understanding of each client's business. This gives us the insights we need to proactively suggest ways in which new technologies can help in marketing, lead-generation or communication and how those technologies may evolve over time.

Consultancy for Drupal Websites

Our team will provide consultancy to help clients overcome a wide range of Drupal-related challenges. Our areas of expertise include:

- Technical planning and scoping
- System architecture
- User experience design for Drupal
- Drupal performance analysis and troubleshooting
- Hosting consultancy and procurement

We will normally work with you as part of an initial planning phase, or as part of a preliminary requirements gathering exercise for a procurement process.

will clearly document all work in a concise document which can be used by both technical and non-technical stakeholders.

IT Service Management

We have designed and implemented an IT Service Management (ITSM) plan with the following roles. The dedicated Service Management Team at Circle would typically consist of:

Project Director/Principal Consultant – strategic

Project Manager/Senior Consultant – day to day management & communications

Sysadmin – server infrastructure

UX designer – user centered system design

Graphic Designer – visual interface design

Senior Developer/Senior Consultant – technical input as required

Junior Developer – technical work as required

Support/Test/QA – testing and escalated assistance via ticket/call

Others as necessary

Project Management

In all projects we use a standard delivery approach and we prefer to adopt an agile methodology built on a set of proven processes to ensure 'on-time' and 'on-budget' delivery. However, our Project Managers are experienced working to various methodologies and can adopt your preferred framework if required.

We would typically deliver a project in a series of distinct phases with delivery of functionality in a series of releases throughout the project based on a sprints of 2-3 weeks each. We'd agree a timetable during the discovery phase. We'd normally expect phasing to be something like:

- Phase 1: Discovery and Recommendations
- Phase 2: Wireframes and Designs
- Phase 3: Implementation
- Phase 4: Testing and Launch

However, we'd agree on the exact scope and phasing during initial discovery.

Standard service & performance reporting methods/frequencies

We always aim to offer our clients the level of support they need at regular pre-agreed intervals. The provision of these services will be pre-aligned to both our clients and their users needs.

Services will be delivered to a defined quality, sufficient to satisfy requirements identified from business processes. A clear service portfolio will be developed and maintained as the basis for all service delivery and service management activities. For all services, a corporate level SLA and/or specific SLAs, which have been agreed with relevant stakeholders, will be in place.

We will normally provide weekly phone updates on the progress of all development work, tickets and incidents. Resolved/completed issues will be further listed in billing. Our internal monitoring also measures time to first response on tickets and numbers of tickets in certain statuses for more than a given time.

Circle Service desk

We have been providing hosting, maintenance and support for Drupal and CiviCRM sites since 2006. Circle support clients using our support ticket system built in Drupal and adapted specifically for the type of support we offer with notifications of new tickets, time recording and issue categorisation. The ticketing systems is monitored during normal working hours 9am – 5pm UK time. Out-of-hours support services may be provided by prior arrangement.

We will provide you with user accounts for our support site to enable the creation and tracking of support tickets through this interface and so you can upload images (such as screen shots) relevant to the issue.

We will monitor all tickets created through this system regularly throughout the working day. In the case of some issues where there is an element of particular urgency or a complication that is difficult to describe through a written report, we are available to discuss issues on the phone as well.

Onboarding

Whether you are starting with a fresh project or simply changing to a new supplier, we believe the process should be as simple and effective as possible. We run a standard process to collect all the relevant information about your organisation and your project by phone, exchange of emails and face to face meetings at your premises where necessary.

We'll find out about your organisation's needs and your team and gradually introduce the key members of our team at the appropriate stage of the process. In the case of taking over an existing system, this should be straightforward and move rapidly once we've established all the details. In the case of a new project, this will lead into the discovery phase of work.

Exit Process

At the point where this contract would be terminated and taken over by another party or taken in-house, following written confirmation of the above, we would appoint a single person to act as the Exit Manager and this would likely be one of the main points of contact during the operation of the contract.

The Circle exit manager and the client exit manager would between them draw up a plan and timetable for the transfer of documentation, winding down of any any services and any interim management structure that may be needed to ensure a smooth transition with minimal disruption.