Service Definition

G Cloud 11 – Cloud Support

Redspire Dynamics 365 Service Pack – Cloud Support Services

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1. **Introduction:**

This document describes service provisions from Redspire Limited (Redspire) and a composite set of **Cloud Support services for G Cloud 11 Framework submissions.**

Redspire Cloud Support.

As a leading Gold Partner, Redspire Limited has vast experience in supporting organisations with extensive consultancy, development and support services for Microsoft Dynamics CRM to enable them to experience full functionality, features, bespoke capabilities and service from the system.

Redspire's agile, expert consultancy team will enable full functionality of the Dynamics CRM system according to specified requirements to maximise return on investment, operational efficiencies, maximise user adoption, reduce risk and ensure that little time is lost.

Specialist Cloud Services Offered

Redspire Limited offers a range of services to G-Cloud customers under the following service definitions:

- Microsoft Dynamics CRM Consultancy & Development – we offer a comprehensive approach to any organisation wanting to implement or customise their Microsoft Dynamics environment. We can high level consulting and business process optimisation down to practical implementation, customisation and support services. The Redspire team are Microsoft certified Dynamics CRM consultants will ensure you get the most from your implementation of Microsoft Dynamics.
- Custom Application Development – our highly qualified and Microsoft Certified team will work with you to identify requirements and development customer applications that meet your specific business process, management information system or business intelligence needs as well provide addition help with integrating to your solutions to other third-party systems.
- Cloud Migration Services - provides a wide range of both consulting and practical implementation skills to customers who want to migrate or develop systems into either public, private or hybrid cloud-based solutions. We offer a complete range of services from consultancy and solutions design to implement, training and support services. All of our team of Microsoft certified in core technologies such as SharePoint, SQL Server, Windows Server & Desktop, Microsoft Office, Microsoft System Centre and Microsoft Azure.

Managed Service Offering

Redspire provides a broad range of services that offer a flexible approach based on size and complexity of customer, understanding that one-size does not fit all.

Redspire's Managed Service delivers engagements that include the following:

- Consulting
- CRM Strategy/Roadmap
- Feasibility Analysis
- Technology Evaluation & Selection
- Functionality Mapping & Gap Analysis
- Project Scoping
- Metrics Reporting & ROI
- Proof-of-Concept development
- Application Audit & Health Check
- Implementation Strategy
- CRM Add-on Assessment & Selection Service

Architecture/Design Implementation
- Full lifecycle Implementation & Deployment
- Release Management

Customisation and Integration
- CRM Configuration and Customisation
- Business Intelligence and Reporting
- Integration Services

Upgrade Services
- Application/Product Upgrade
- Database Upgrade
- Data Conversion and Migration
- Multiple system consolidation

Data Services
- Migration and Unification of Customer Data
- Real Time/Batch Data Cleansing
- De-duplication and Data Aggregation Services

Training
- Standard Application Course
- Tailored Courses
- End User Training
- Refresher Courses

QA and Testing Services
- Testing and QA Consulting
- Manual, System and Integration Testing
- Performance and Load Testing
- Disaster Recover, Resilience and Availability Testing
- Test Automation

Business Intelligence and Analytics
- Reporting and Data Requirements Analysis

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- Data Warehousing and Data Load/ETL
- Custom View and Report Development
- Dashboards

Support and Maintenance
- Application Support
- Customisation Support
- Database Administration
- Application Administration
- Performance Tuning

Overview of the G Cloud Service provided by Redspire Limited:

Dynamics CRM:
Microsoft Dynamics CRM is a fully integrated customer relationship management (CRM) which Redspire can be configure, customise and implement to fit the needs of public sector organisations.
Dynamics CRM gives you the capability to easily create and maintain a clear, single view of customers (citizens) from first contact through all interactions and service delivery 'touch-points'.
With tools to enhance your communication, case management and customer service processes along with native Microsoft Office Outlook integration, Microsoft Dynamics CRM delivers a fast, flexible and affordable solution.
Microsoft Dynamics CRM helps you drive consistent and measurable improvement in everyday business and service management processes.

Redspire Limited:

1.1 Overview

Redspire offer a comprehensive range of consulting, training and support services for Microsoft Dynamics CRM, for both new and existing implementations involving service expansion, migration and upgrades.

With vast experience and Microsoft Gold partner status, Redspire save its customers' time and money whilst minimising business disruption, enabling them to maximise ROI and avoid risk.

Redspire purely focus on customer relationships and Microsoft technologies that enable them to be managed and nurtured. This means all of our processes and focus are specifically tailored to ensuring our clients are working with their customers in the most effective way.

Our depth of experience and unique processes for delivery enable us to develop new models for our clients, as well as being fully versed in the delivery of traditional projects. With Redspire's agile approach, our clients are up and running and realising the benefits right away with optional provision to develop them a tailored system as requirements evolve.

Over the last 13 years, Redspire has developed its own implementation process, grown an expert development and delivery team.
Our expertise in combination with our size enables a responsive approach to ensure that the team executes delivery to a high standard, understands our customers' processes and can always react to the best way of working in accordance to requirements.

1.2 Services Offered
Redspire offer a comprehensive range of on premise and cloud-based customer relationship management (CRM) services underpinned by Microsoft's Dynamics CRM and in many cases bespoke and innovative solutions that add lasting value. Expanding this range, Redspire have the capability to deploy further service functionality and features through complementary products to include Microsoft Portal, Azure, Office 365, Yammer, PowerBI.

The services include (but are not limited to):

- Business and process analysis
- Solution design, solution configuration and customisation
- MI & reporting
- System integration and data migration
- Application design and development
- Dynamics CRM implementation (cloud and on premise)
- CRM upgrades and migration for Microsoft CRM Online
- Customer training services: admin and end user training
- 'Train-the-Trainer' training
- Customisation / workflow training
- Custom training solutions with supporting documentation
- Project management
- Comprehensive on-going support and advice for new and existing Dynamics CRM Implementations
- Office 365, SharePoint, Power BI (data analytics) and Portals consultancy
- Ad-hoc consultancy
- Data management and data services
- Data governance and archiving
- Application support and maintenance

All services are delivered by Microsoft certified and UK based experienced personnel.
Further information is available at: www.redspire.co.uk

Redspire are successfully engaging with and providing support to some of the UK's major Public Sector and commercial organisations including;
Money Advice Service,
Golden Charter,
Home Retail Group (Argos),
Skills Development Scotland
Clydesdale & Yorkshire Bank
RPMI
WPP

Go Ape

Redspire assist them in the design and implementation of a range of Microsoft Dynamics CRM based projects and ongoing development and support, SharePoint, Office 365, Power BI & Microsoft's enterprise social network platform: Yammer.

2. Service Definition

Service Overview

Redspire offer a comprehensive range of Dynamics CRM solutions and services that add lasting value to our clients' businesses, planned, implemented and supported with our agile approach. Our technologies help you meet your challenges head-on with all the tools you need to transform your organisation and approach to service delivery tailored to your customers.

Service Description

The main components of this service are:
- Dynamics CRM customisation
- Dynamics CRM development
- Dynamics CRM testing
- Dynamics CRM upgrade
- Cloud migration
- Data migration
- System integrations
- Risk Assessment

Service Benefits

The customer will have the following benefits:

- Improving organisation performance reporting
- Deep understanding of operational environment and customer insight
- Experienced, UK based CRM Staff
- Innovative and unique cost-effective consulting model
- Dedicated account manager and support team

2.1 Service Delivery:

Redspire Approach

Redspire are Microsoft Sure Step accredited, the Microsoft standard project planning approach and is widely used across the industry for deploying CRM projects.

Microsoft Dynamics Sure Step is a full customer lifecycle methodology for all Microsoft Dynamics solutions.

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It provides best practice and comprehensive sales through delivery guidance, project management discipline alignment, and field-driven best practices, while facilitating the due diligence process and a high-quality solution delivery for the customer.

The phases of the project are defined by Microsoft as:

Diagnostics - The diagnostics phase starts during the sales process and ends with an accepted proposal and statement of work for the next part of the implementation project

Analysis - The analysis phase represents the official start of the project implementation. This phase defines the activities required to initiate and effectively plan the entire project.

Design - Building on the deliverables created during analysis, this phase consists of determining the design for the overall Dynamics implementation and designing solutions for specific customizations, integrations, and data migration needed to satisfy business requirements identified during the Analysis phase.

Development - The primary purpose of the Development phase is to develop the customisations, integrations and data migration processes that were defined in the design specifications created and approved in the Design phase.

Deployment - The deployment phase is a key area of the project as at this stage a roll out to all users will occur.

Operation - The primary purpose of the Operation phase is to support you technically and functionally during the initial Go-Live period for the new system.

Optimisation / Change Requests - Once the project has been completed, opportunity will be available to raise any optimisation or change requests.

Estimate Preparation

In preparing our proposal, Redspire work in accordance with Microsoft's structured process with Redspire's agile approach that has been developed and evolved based on years of project delivery experience. At this initial stage in the estimation process, we prefer to use this as a discussion document as the transparency helps both you and Redspire consider all the elements and requirements that contribute to a successful project.

Discovery and Analysis Phase

Whether your project is a new CRM implementation, upgrade, migration or additional work required on an existing deployment, we need to first carry out a discovery consultation to analyse your needs and translate these into a high-level design. At this stage, we consider your functional needs, desired outcomes, any data migration effort, system integration, workflow, custom development or reporting needs and confirm the number of days required to deliver against them.

This phase leverages any work that you may already have put into mapping your own business processes and marries these against the functionality offered in Microsoft Dynamics CRM. The outcome is a thorough understanding of how the organisation will implement the solution and a final understanding of the level of investment it will need.

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Requirements

In each requirement meeting or workshop there will always be a lead consultant and a consultant in attendance. After each workshop these two team members meet to agree and consolidate their notes and from there the consultant writes the requirements document. This generally takes the form of a solution proposal document(s) and accompanying spreadsheet detailing estimated effort against activities. These typically range from design to configuration to data migration, workflow creation, custom development, system integration, testing, end user training, system administration training and the project management required to oversee a successful delivery. Once that document is produced there is an internal review with the lead consultant before being issued back to the client for review and sign off. Any questions are answered, or clarifications are made, once the client has reviewed the document, then subsequent to any revisions, the document is signed off. From experience we find that this process ensures the best capture of the requirements while increasing the quality of the output and revisions are kept to a minimum leading to accelerated sign off.

2.2 Redspire Limited's Project Delivery Process

- Lead CRM consultant
  - Product lead, directs & signs off on the work of the consultant team
- 2 CRM Consultants
  - Business analysis, requirement gathering, documentation, CRM customisation, configuration and deployment
- CRM Developer
  - Integrations, plug-ins, script, coding, systems analysis and consultant support
- Project manager
  - Project lead, planning, execution and managing the people, resources and scope of the project, client communications

Using this team, we then take the following approach that ensures your requirements meet your business needs and that the system we develop meets the requirements and the quality standard.

2.3 Implementation Programme

- High level analysis
- Contracts
- Kick Off meeting
- Define the customer journey (finalise requirements)
- Test scenario definitions and sign off
- Design
  - Configuration design /build

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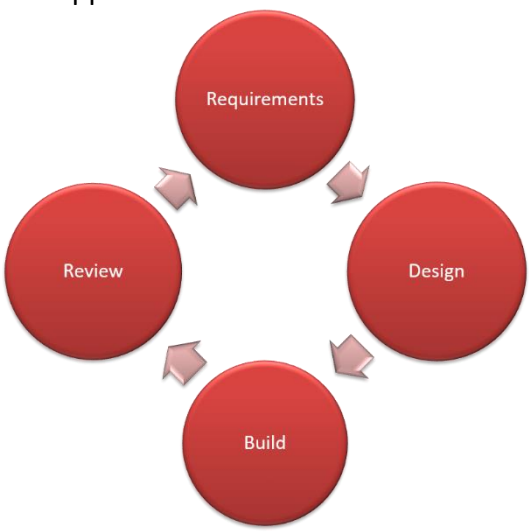
    - Technical design
- Technical Build / unit test
- Integration testing
- User acceptance testing
- Full user training
- Go live
- Post go live support



Test scenario development

Once the requirements document has been submitted for sign off, the consultant will produce a list of test scenarios relating to all of the business scenarios identified in the requirements process. These test scenarios will then go through an internal review with the lead consultant and once signed off internally, through a review process with the client.

This ensures the requirements are validated with test scenarios and that subsequent phases of the project will be guided by the requirements and the test scenarios to ensure the best fit and quality is produced.

Design

Once the requirements have been signed off the Redspire team hold an internal workshop to work through the most suitable high-level architecture and design for the project. From there design is split into two key sections, configuration design and technical design (this includes plugins, Java script and reports).

The approach to these two design sections differs as below:

Configuration Design / Build

The consultant will take the key requirements and create the core system as they see it. This involves creating all the entities with their associated attributes, relationships and business process flows. From here there is an initial review with the lead consultant to ensure that it is a close match to the requirements and high-level design.

The consultant then reviews this with the client's key project team and lead users, and this allows the team to visualise the system as it has been discussed. Redspire then take feedback on this first cut to work out modifications or optimisations to the system as required. Typically, we have three iterations of this process meaning that the users get the form layouts, fields and process flows they need to make them efficient. In each iteration the consultant is also walking through the system to ensure that the requirements for the workflows are 100% accurate before commencing build on them.

Once this process is complete the consultant then documents the key business process flows with screen shots of the system and this provides a sign off design document and the start of the user manuals.

The reason we take this approach is that we find users can better ratify the design when they see the screens and how they will interact with them. We find that to mock these screens up in something like Visio actually takes longer and is less productive for the review.

This means that what is built exactly matches the users' requirement and has been extensively reviewed ensuring the configurations are exactly as expected.

Technical Design

Plugins and Java Script

We split technical design out as a separate process as we have found that the most successful approach differs from the configuration approach detailed above. We run the technical design process in a more traditional manner where the developer will document the design, detailing any interfaces, integrations and business logic. This will then be walked through with the client's key business users to ensure the logic is correct before it would then be signed off ready for development.

Reports

Reports again fall under the more traditional technical design process where a consultant will document the design of all the reports required. There will then be an internal review with the lead consultant before a review loop with the client.

These reviews again ensure that the quality for the design output is of the highest standard and matches the client's expectation.

Development

With simple plugins and Java script we maintain quality with peer code reviews and developer testing. With more complicated plugins or integrations, we utilise MOQ for automated unit tests, ensuring that the code functions correctly and that any future changes can be automatically regression tested using the same automated tests.

Integration test

Once all development and configuration are complete the consultants run though all business processes and test scenarios to ensure the system is operating as per requirements. Once the testing has been completed the system and all key business

scenarios are demonstrated to the lead consultant to ensure they feel that the system meets the requirements of the client. Once this has been completed the system is then demonstrated to the client in a walkthrough of all key business processes. At this point the system is ether signed off from the system/integration phase and can enter into UAT or goes back through a review cycle to remedy any issues.

This process of the Consultant testing the full system followed by the Lead Consultants review ensures the quality of all individual deliverables and an exact fit to requirements (as the individuals that have initially gathered and documented the requirements from the client have verified, they have all been met).

UAT

Redspire provide support and guidance throughout UAT and if any issues are found we ensure that they are resolved, and all documentation is updated.

Go Live

Redspire will have prepared full implementation documentation before deployment to UAT and will use the deployment to UAT to test the go live plan. This ensures that all elements of the implementation have been checked to avoid any issues on the day of Go Live.

Redspire will also work with the client to plan the data migration and roll out approach from one system to the next. Once the data migration plan is completed Redspire will work with Synchronicity to test it prior to go live to ensure a smooth deployment.

Post Go live support

Redspire will provide consultants on site for the appropriate period post go live to ensure that any queries or issues are dealt with quickly and efficiently. To ensure the quality of this service all issues are logged, and resolution times monitored. The lead consultant works with the client to prioritise any issues each day during the post go live support period.

3. Training and Support

3.1 Training

Redspire offer dedicated training as an integral part of the solution delivery geared to make certain that all of your users are fully equipped to get the most out of using the Dynamics CRM and ensure that the investment made is maximised.

The system will be designed to support business objectives, that users are taking full advantage of the systems capabilities and therefore place great emphasis on ownership and training before, during and after implementation with associated documentation and manuals.

To support our training, we offer access to a variety of training materials for all the system's users, such as: customised training manuals as part of in person onsite training, access to recorded online sessions, video training and standard training manuals.

3.2 Support Options

Option 1	Option 2
Standard Support Package – 2nd Line Support with System Enhancement days	Bespoke Support Package – Custom SLAs, Opening Times, 1st or 2nd Line Support

<u>Option 1</u>

Enhancement days

Can be used for

- Creating new dashboards/views
- Customisations to either core entities or existing custom entities
- Customising existing forms or workflows
- Training

- Unlimited Helpdesk
  - incident resolution for incidents that can be resolved within 30 minutes
  - Simple walkthroughs/questions
  - Basic Training
- 9:00am to 5:30pm hours of support
- 2nd Line Support (Email and Telephone) with Consultant and Development resource to assist
- Standard SLAs

<u>Recommended - Option 2</u>

- 1st, 2nd or 3rd line Support available
- Customised hours of support

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- Bespoke SLAs
- Recommended as this would be ideal for larger organisations
- Optional enhancement days

3.3 Microsoft Advance Support Included

Included within Redspire's support and bespoke SLA where required, we would offer cloud-focused support with a personal connection to Microsoft.

This would provide a less than 1-hour incident response time for your most critical issues for the Dynamics CRM Online system, dedicated support advisors and proactive guidance and training so your team is ready for new system updates.

4. Data Security, backup and disaster recovery

Redspire and Microsoft are passionate about their protection of data privacy and Microsoft is the only company to have gained accreditation from all European state members for data security on their online offerings.

Built on foundational trusted cloud principles of security, privacy and control, compliance and transparency, CRM Online and Portal will offer customers data residency in the UK, bringing world-class reliability and performance.

Dynamics CRM Online also meets many international and industry-specific compliance standards including ISO/IEC 27001, ISO/IEC 27018, FedRAMP (for Dynamics CRM Online for Government), and SOC 1 and SOC 2 Type 2 Reports.

Backup and Recovery

Application software and related data running on the software would be hosted within a Microsoft datacentre. Microsoft replicates customer data in at least two datacentres at any given time to protect against failure or local disaster.

If a datacentre ceases functioning for any reason, customer data is not lost as your application software and programme data running on that application software are also available from a second or possibly third datacentre.

Clients might not be notified when failover occurs as the failover may not result in any service interruption for the team and the programme's users. Clients should assume that at any given time the data may be processed in either one or more of the datacentres in the region.

Service Logs

Dynamics CRM Online has been designed to use service logs, rather than direct access to customer data, for purposes of providing, maintaining, and troubleshooting the online services.

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Service logs record errors and performance issues and may contain limited customer data such as email addresses, subject lines of emails, file names, and site URLs to identify the source of the error or performance issue being recorded.
Service logs do not contain customer-authored data such as customer documents, email message bodies or attachments, website content, or IM/voice conversations. Occasionally, access is required from another location to address a specific service issue.

5. On boarding and Off boarding processes/scope

5.1 On-Boarding

- The defined Scope or Work (SOW) and/or Specification to be agreed with the Customer and Redspire (Redspire are able to assist with the creation of the SOW).
- Redspire reserves the right to provide the best resource available for the role, based on the Specification and/or SOW.
- A two-week period is required from the date that the Call-Off Agreement and the SOW and/or the Specification, as defined in the Supplier Terms, are agreed to with the Customer to bring on the required personnel. If during performance an amendment is required to expand the Specification and/or SOW, a two-week period is required from the date that the amendment to the Specification or scope of work is agreed to with the Customer to bring on the required personnel.

5.2 Off-boarding

- A thirty (30) day notification period is required for early termination.
- Full handover to the customer will be provided by Redspire's allocated Project Manager.

6. Service Management Details

Please refer to our terms and conditions document.

7. Service constraints

Following service constraints apply to the provision of an allocated Project Manager:

- Working Day – 8 hours exclusive of travel and lunch.
- Working Week – Monday to Friday Inc. Bank Holidays excluding National Holidays.
- Office Hours - 09:00 – 17:30 Monday to Friday.
- Travel and Subsistence - to be agreed at the time of a Call-Off.
- Professional Indemnity Insurance – included in day rate.

8. Service Levels

- Redspire's allocated delivery and support teams will have relevant experience and knowledge of Microsoft Dynamics CRM.
- A two-week period is required from the date that the Call-Off Agreement and the SOW and/or the Specification, as defined in the Supplier Terms, are agreed to with

the Customer to bring on the required personnel. If during performance an amendment is required to expand the Specification and/or SOW, a two-week period is required from the date that the amendment to the Specification or scope of work is agreed to with the Customer to bring on the required personnel.

- The support provided by Redspire would include a rapid-response support line on working days, 9am – 5.30pm with a rapid response, priority support service.
- Redspire could also offer 2nd or 3rd line support, customised hours of support, bespoke SLAs and optional enhancement days for the solution where required.

9. Financial Recompense Model for Not Meeting Service Levels

Financial recompense is not proposed as part of the solution. However, there are other remedies available to the Customer as part of Redspire's terms and conditions.

10. Invoicing and Payment

Redspire shall invoice the customer monthly in arrears at the applicable Fee Rate(s). The Customer shall relinquish payment to Redspire within thirty (30) calendar days after receipt of a valid invoice.

11. Termination Terms

- Either party may terminate the Call-Off Agreement in accordance with the terms the Framework, Call-Off Agreement and Supplier Terms.
- The Customer may terminate the Call-Off Agreement prior to the expiration at any time by giving at least thirty (30) Working Days' notice to the Supplier.
- If the Specification has not been agreed within thirty (30) Working Days from when it is first provided in draft by the Supplier for review and comment, or within such other period as is stated in the Order Form, either party may terminate this Call-Off Agreement under Clause with the Supplier Terms.

12. Customer Responsibilities

The customer will be responsible for the following:

- Appoint a person who shall be authorised to make binding decisions on behalf of the Customer.
- Promptly review all documents that are provided for the Customer's review so that corrections and changes may be made in a timely manner.
- Promptly provide all information reasonably required by the Supplier for the performance of the G-Cloud Services.
- Provide all necessary access to the Customer's staff at agreed times or upon reasonable notice.
- Provide all necessary access to the Customer's premises which may be necessary for the performance of the G-Cloud Services.
- Promptly execute any approvals or other documents which are required for the performance of the G-Cloud Services.
- Provide information necessary for the Supplier to draft a Specification, if required.
- Introduction and on boarding of Supplier personnel to the Customer's organisation.
- Provide Supplier with an overview of the applicable project(s).
- Provide access to ICT and equipment to enable the role to be fulfilled.

13. Data restoration / service migration
Available on request.

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