smartimpact

About us

Company profile

ISO 9001 Quality Management Systems CERTIFIED

ISO/IEC 27001 Information Security Management CERTIFIED

CYBER ESSENTIALS CERTIFIED

Welcome from smartimpact's Chief Executive

Hi - we are **smart**impact, a specialist Microsoft partner helping membership organisations to reach and surpass their digital systems goals.

We're proudly independent and wholly owned. I founded **smart**impact in 2007 and over the intervening years we've built a strong track-record by delivering over two hundred successful CRM, website, mobile app, and integration projects. On the way, we have developed a market-leading set of smart**apps** that address the typical needs of associations, membership-based charities, regulatory bodies, and educational institutes. All our solutions are delivered with the functionality to work in the cloud and across mobile, tablet and desktop platforms.

Our staff are our most important asset, and **smart**impact employs over sixty people, with operations across the UK and EU. Our head office is in London, and we have a European presence in Slovenia, Poland, and Portugal. We're delighted to say that the Covid-19 pandemic did not result in any redundancies or reduced service levels, and we have been able to grow the business substantially over the last three years.

Our long-term year-on-year growth is based on staying focused on deploying solutions for membership organisations and new business generally comes from client and partner referrals based on high quality project delivery and client service. Everything we do centres on quality, and we ensure that our projects produce systems that are stable, robust, and flexible enough to change as organisation needs develop. Combined with **smart**impact's investment in innovation and smart**apps** development gives our clients a strong competitive advantage and makes us a leading partner for Dynamics 365 systems in the NFP space.

The backbone of our history of successful implementations is the ability to build strong supplier-client relationships through proven project management processes and a collaborative, educational, and inclusive approach. We also pride ourselves on clear and honest communications throughout our engagements which ensures that our staff are highly motivated and invested in the quality of outcomes for clients.

We are passionate about quality and committed to monitoring and improving our processes constantly. We hold ISO:9001, ISO:27001, and CyberEssentials certification that are re-accredited every year. Our processes include clear development and release controls, and we maintain multiple client environments to enable development, testing, training, and live implementations that support the regular release of new features.

We believe that our approach, solutions, and sector experience enable us to provide a low-risk option to our clients, and we are confident in our ability to work with you to deliver the best possible outcomes. **We look forward to working with you!**

Ahmed Eltohamy
Chief Executive

About smartimpact

smartimpact is a specialist provider of membership management systems built on the Dynamics 365 CRM platform. We work exclusively with professional bodies, trade associations, regulators, and membership-based charities. Founded in 2007, we have been serving the membership market for seventeen years and have delivered over 200 successful implementations.

Our clients are some of the UK and Ireland's largest and most prestigious membership organisations and include Chartered Institutions, Royal Colleges, large charities, and several Learned Societies:

*Figure 1 – Examples of **smart**impact clients.*

Most of our clients have a core set of requirements focused on

- engaging with a diverse group of members and stakeholders and managing core activities such as subscription finance, online self-service, event registration, and groups and committees;
- educating, developing, and supporting students and learners through training and CPD;
- repositioning professions for modern ways of working using automation, AI, and other digital technologies;
- delivering high-quality membership services and benefits; and
- interacting with stakeholders and member of the public around the world.

We recognise that digital technology projects provide significant modernisation opportunities for professional associations, so we put a lot of focus on improving the efficiency and effectiveness of internal processes and delivering new digital-first services to members.

smartimpact's revenue in 2023 was £7.2 million, making us the largest independently owned Microsoft partner working with professional membership bodies. We have sixty-four staff and an average tenure of over four years, which is higher than the industry average of three years (ref: Society for Human Resource Management). Our team all have direct experience working with and sometimes for membership organisations which means they bring empathy with the challenges associations face and insight into what has worked in similar organisations. We encourage our team to be innovative, to embrace and deploy the latest technologies, and take great pride in being a trusted advisor and partner to our clients.

Our technology and services

smartimpact is an end-to-end solution provider for our clients. We are a full-service Microsoft Dynamics 365 CE partner with specific expertise in CRM configuration and systems integration that support our clients' end-to-end business processes. Typically, this includes complex application and vetting processes, managing membership finances and renewals processes, administering events, education, and exams, and delivering intuitive CRM processes for end users. We also enable our clients to streamline their internal processes by using modern automation tools such as Dynamics 365 workflows and Power Automate.

In addition to Dynamics 365 CRM solutions, we also deliver powerful online experiences through portals and websites that directly engage with our clients' members. We have experience of delivering portals from scratch built on the powerful Umbraco and Kentico CMS platforms, and we also regularly work alongside our clients' external web agencies to integrate streamlined portal functionality into a range of website technologies.

Throughout our projects we deliver a range of services, including:


Strategic advice and systems architecture


Needs definition and cost case creation


Discovery and business analysis


System design


System configuration, customisation, and development


Implementation and go live


User adoption, education, training, and documentation


Ongoing break-fix support


Ongoing managed services

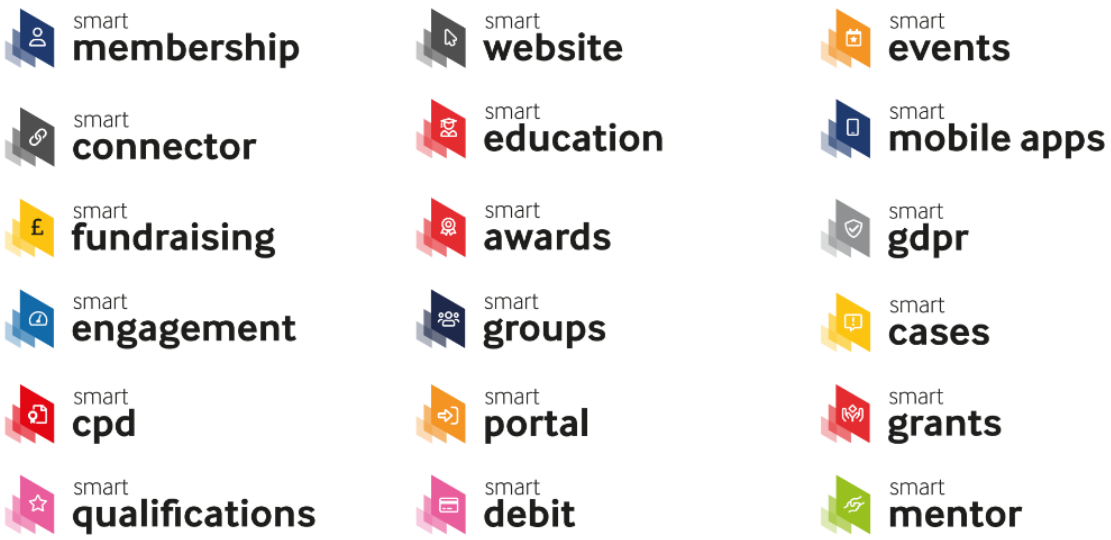
Our consultative approach starts by understanding your goals and delivering a road map to achieve this with our technology. We don't just provide great tools; we also ask lots of questions and do a lot of active listening. We aim to bring expertise from dozens of comparable projects to the table so that we can uncover opportunities and tailor the system to deliver the most benefit to your work.

smartimpact invests a huge amount of time and money in maintaining our partnership with Microsoft and the other technologies we use. This is to provide our clients with the guarantee of professional and expert support. All our delivery team hold Microsoft certification relevant to their roles and we are audited annually by Microsoft to ensure that we continue to deliver the highest quality services to our mutual clients. By working with **smart**impact, your investment in Dynamics 365 will be in safe hands as we continue to develop the expertise of our staff and provide total satisfaction for our clients. This will enable you to focus on delivering the internal change and business modernization driving your investment.

Dynamics 365 first-party apps and our smartapps

smartimpact has delivered over 200 successful CRM, website, mobile, and integration projects to membership organisations. On the way, we have developed a set of market-leading smart**apps** that address the typical needs of membership organisations and educational institutes. These are designed to augment the functionality of standard Dynamics 365 first-party apps (e.g. Dynamics 365 Sales and Dynamics 365 Customer Service) by delivering specific functionality for membership organisations which is a white-space for Microsoft's core offering. This enables our clients to be up and running with their membership management CRM much quickly than building membership functionality from scratch.

Our **smart**apps include functionality to support membership onboarding and finance, member engagement, marketing and communications, events and conferences, training, and education, CPD and continuous learning, groups and committees, fundraising, donors, grants, and much more:



All our smart**apps** are built using standard Microsoft tools and deployed as Dataverse solutions, meaning they benefit from native interoperability with first-party Dynamics 365 apps, the Power Platform and Dataverse, and the Microsoft Common Data Model (CDM). They have been designed from the ground up to work on any modern desktop, mobile, or tablet device.

Critically, smart**apps** are modular, meaning you only need to purchase the ones that are relevant to you, and you will receive a license to use them in perpetuity. This means you will never be cornered by our IP and can develop your own apps and business processes alongside our functionality long into the future. This ensures our relationship is always based on mutual value and cooperation.

Microsoft Azure hosting

All **smarti**mpact client data is hosted in Microsoft Azure in your own Microsoft Azure tenant. Our clients benefit from a range of world-class Azure-specific benefits, including:

- **Exceptional security**
  Microsoft invests over $1 billion per year in global security initiatives and employs over 3,500 security experts. Microsoft Azure includes several unique intelligence controls for identity and access management, network integrity, threat protection and system security.

- **Leading compliance standards**
  Azure has over 54 global hosting regions (including a state-of-the-art data centre in Ireland) and the deepest and most comprehensive compliance coverage in the industry. This includes ISO:27001, ISO:9001, WCAG 2.0, GDPR, and Cyber Essentials Plus, G-Cloud accreditation, and UK PASF.

- **Powerful functionality**
  Azure delivers an ever-expanding set of cloud computing services that help organisations to meet their business challenges. Your system can instantly scale up or down to cope with additional demands without the need for any hardware changes, and you can take advantage of the Microsoft toolset, like flows and logic apps, without the need for additional coding. Microsoft also offers SLAs of 99.9-99.95% uptime, meaning that you won't have to deal with outages.

- **High-quality analytics**
  Azure enables full visibility of your system usage and errors across the system meaning it's much quicker to analyse what's going and take any actions if necessary. There's no need for hardware administrators or expensive support contracts – we'll take care of everything for you.

Our delivery approach

smartimpact has a tried and test delivery approach that enables us to deliver consistently high-quality implementations based on industry standard principles to our clients. We seek to provide a professional and collaborative service to our clients that is appropriate to their project objectives and budget ensuring they are supported throughout the project lifecycle.

Our implementations are split into four phases. This combines a detailed discovery focused on delivering the minimum viable product which is then developed through an agile build phase made up of a series of "sprints" to make it efficient and easy to work on different business areas iteratively.

Working this way ensures that the overall requirements are understood, lowering uncertainty about the overall project scope, but enables us to work through agile iterations so we avoid cul-de-sacs and minimise rework. It also ensures that the project team has the flexibility necessary throughout the build phase to respond to business change, or to adopt innovations or better ways of working empowered by the technology. Throughout the project we ensure our clients are supported and engaged through a transparent delivery processes and regular communication:

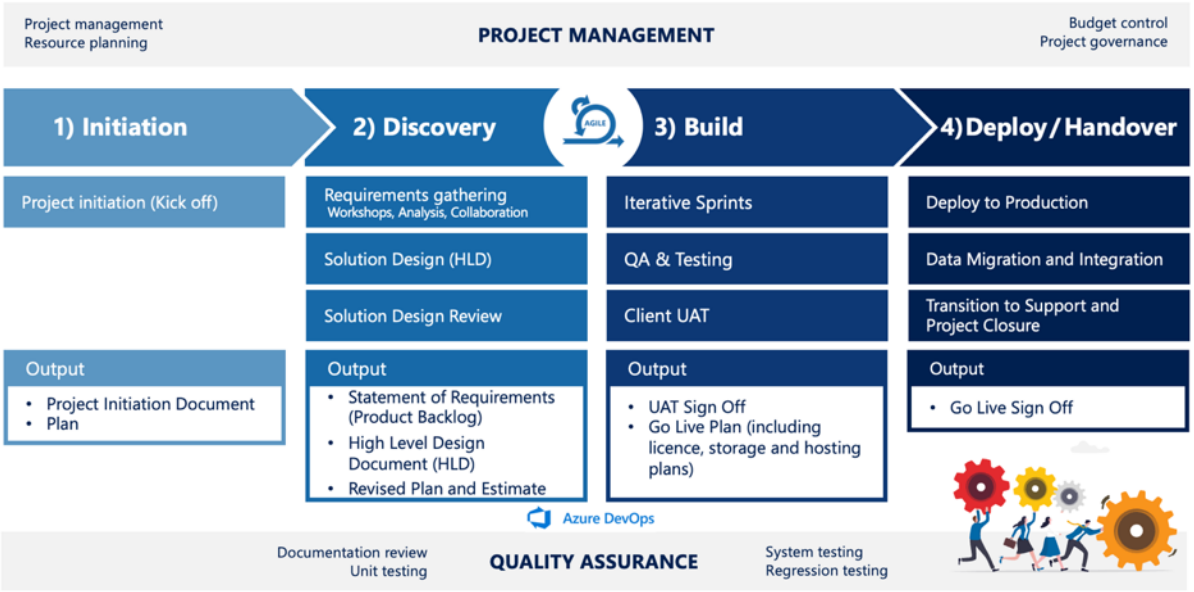


Figure 2 - Our delivery approach is split into four phases

Here is a high-level overview of the four phases:

Phase 1: Initiation is used to start up the project and establish clear terms of reference for the project by creating a Project Initiation Document (PID).

Phase 2: Discovery is used to establish a backlog of requirements for consideration and a *High Level Design* (HLD) document which compliments this requirement gathering exercise and ensures that the design fits in with constraints, the optimum licence model, and Microsoft best practice.

Phase 3: Build is where the creation of the client's solution takes place ('the build'). This is the agile part of the project where repeatable 'sprints' of configuration and development take place to create the new solution, as well as running complimentary technical projects in parallel focused on data migration and integration as required. The number of sprints will be underpinned by the agreed HLD, budget and approved backlog of requirements from Phase 2. User acceptance testing (UAT) will occur during this phase, either during sprints or at the end of the project (depending on the scenario and client preference/availability). Ultimately the build and testing will close during this phase.

Phase 4: Deploy and Handover upon approval of testing and completion of the build, phase 4 covers further training, a deployment of the solution to Live (Production) and a handover to our internal support team. A successful go live launch will then trigger project completion as our service transition into business as usual (BAU) support.

Our experience has taught us that project success depends on many things, but at the core are:

- engaging and listening so we are being people-centric in design;
- utilising a sound, well-tested project methodology;
- ensuring delivery quality through careful and consistent testing;
- and supporting all the above with expert project management.

Phase 1: Initiation

The first phase of our project is initiation. During this phase we will:

- Undertake a handover from our pre-sales team to our delivery team.
- Appoint a project manager to lead your project within **smart**impact and to liaise with your team on preparation for the discovery phase.
- Undertake a detailed review of all documentation you have shared with us to date and prepare the groundwork for discovery.

The output of the initiation phase will be:

- A *Project Initiation Document* that outlines the key objectives of the project including its context, client expectations, high-level scope, team members from **smart**impact and the client, and expected project outcomes.
- A *Project Plan* for discovery that will document the dates and format of workshops, key personnel from **smart**impact and the client, and a detailed discovery project timeline.

Figure 3 - The Initiation phase is key to ensuring that the project starts on the right footing, with clear lines of communication, defined roles, and responsibilities and in line with expectations.

Phase 1: Initiation responsibilities

During the initiation phase, the client will have the following responsibilities:

- Appoint a project manager.
- Liaise with **smart**impact to organise a plan for discovery workshops.

During the discovery phase, **smart**impact will have the following responsibilities:

- Undertake internal meetings to handover from pre-sales to implementation teams.
- Appoint a project manager.
- Liaise with the client project team to organise a plan for discovery workshops.

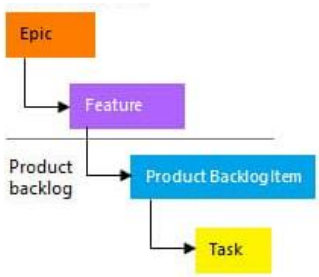
Phase 2: Discovery

Discovery is focused on capturing requirements and creating a high-level design of what the solution needs to provide and how. Analysis of requirements is key in this phase. Before the build phase (configuration sprints) can commence, initial requirement 'items' need to be identified to allow for a list to be collated and prioritised into a 'product backlog'.

The discovery phase starts with a series of workshops between relevant members of our team and subject matter experts (SMEs) from the client. Each session will be focussed on a specific function, department, or conceptual areas of the project - e.g. membership, finance, data, or integration. The purpose of the workshops is to discuss requirements in detail and ensure that both teams have identified, confirmed, and fine-tuned the project scope, solution requirements, and each stakeholder's involvement.

Figure 4 - A typical in-person workshop session.

After each workshop, we will publish a summary of our findings and the items identified for confirmation by you. These items are referred to as Product Backlog Items (PBIs or stories) and we will use Microsoft Azure Dev Ops (ADO) to manage this process with you. The backlog will be organised into groups of similar or related PBI/stories collectively referred to as *Epics* (e.g. to describe a significant business process). In turn, Epics, will be grouped into sets of *Features* made up of a smaller number of stories. Once this has been achieved a product backlog will be created that will allow the team to select and prioritise which PBIs/stories they would like to be delivered during the first sprint, which form the tasks for the specific sprint.



After all the workshops are complete, we will collate our findings from every workshop session to identify any contradictions, duplications, or gaps. We may recommend further workshops if we need to iron these out to clarify the scope. The findings will be combined into a solution specification document called a *High Level Design* (HLD) detailing what the client needs the system to be able to do so that both our implementation teams understand what is being built during the build phase. At this stage we request that the HLD is agreed and signed off by you and the document will be used as the basis for how all applications, business processes, and integrations will be configured. If it is not possible to completely define any requirements during the discovery phase (e.g. because of dependency on a known future business process, an anticipated change of system/approach, or the outcome of another project) then the scope can be altered during the project following our change management process.

Figure 5 - The High Level Design (HLD) document outlines the build phase objectives and functionality.

Figure 6 - Discovery phase overview.

Phase 2: Discovery responsibilities

Client:

- Ensure that client project team is in place and identify Subject Matter Experts who can represent each team in the scoping process.
- Lead internal change management and related decision-making processes.
- Take part in project initiation and scoping meetings.
- Complete scoping questionnaires.
- Review and comment on solution specification drafts.
- Triage comments raised by staff and resolve internally where possible.
- Compare requirements against other system requirements (such as website requirements) to ensure consistency across all client systems.
- Sign off project charter, solution specification, and other system specifications where appropriate.
- Meet the timings/milestones in the initial project plan.
- Introduce all suppliers involved to each other and outline key touchpoints.
- Ensure that all supplier project plans are aligned and any dependencies between plans are communicated to all.

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- Run project initiation meeting with the client project team to go through draft project charter and initial project plan.
- Produce part completed scoping questionnaires based on existing knowledge of client requirements.
- Run scoping workshops with client project team and the subject matter experts in each team.
- Analyse the questionnaires and workshop notes to produce a draft solution specification for client comment.
- Understand which client data sets are to be imported into the CRM.
- Respond to client requirement comments.
- Meet the timings/milestones in the initial project plan.
- Attend supplier introduction meetings, communicate with other suppliers to answer high level questions regarding scope and integration.
- Manage a RAID log and send regularly to client

Phase 3: Build

During the build phase our team will configure your system through a series of agile project sprints focused on delivering an agreed set of PBI/stories from your HLD document. In addition to these spring, the build phase is also when the key technical aspects of your project such as data migration and integration are delivered in parallel to system configuration.

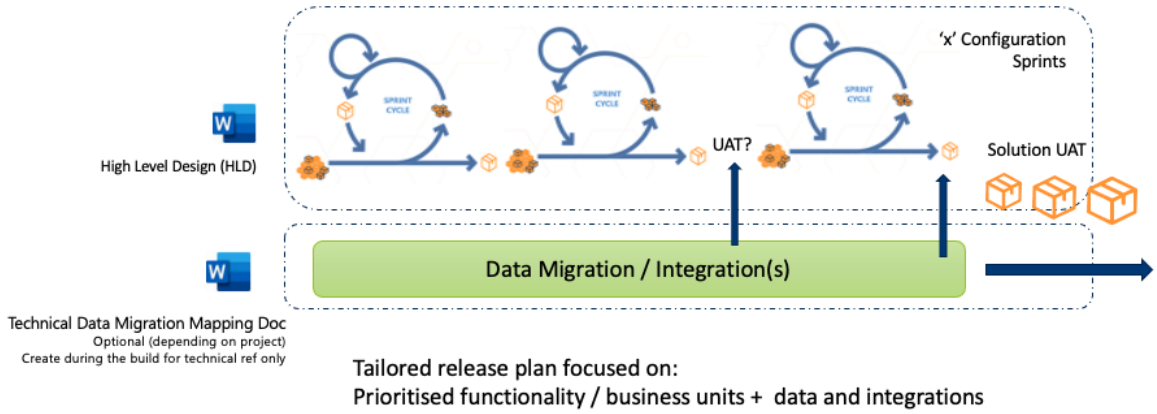

*Figure 7 – **smart**impact's build phase methodology. Configuration sprints are run in parallel to technical aspects of the project (e.g. data migration and integration).*

At the beginning of the build phase, the relevant software modules are installed and configured to meet the core requirements in the solution specification. Typically, **smart**impact will install two Dynamics 365 environments to support the delivery of your project – a DEV environment and a UAT (testing) environment – and then install a final production (LIVE) environment at go live (deployment) for the live system. Some customers have more than three environments, for instance a focussed training system or one for support, and sometimes more. We will discuss your needs in discovery, but our minimum is 3 environments:

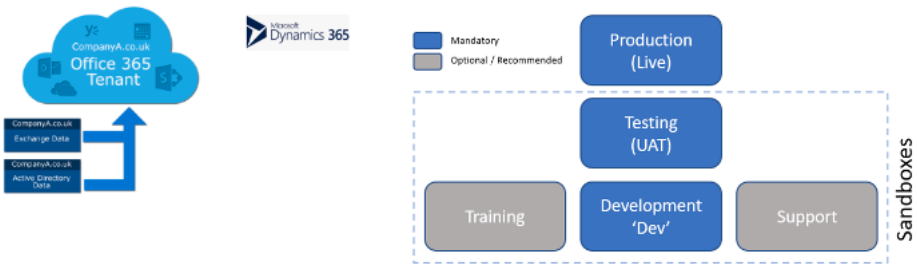

*Figure 8 - Typical environment configuration for a **smart**impact project.*

Agile configuration sprints

Delivering projects using an iterative, agile approach helps our delivery teams deliver value to clients faster and with fewer restrictions. Instead of betting everything on a 'big bang' launch, an agile team delivers work in small, but consumable, increments. Requirements, plans, and results are evaluated continuously so teams have a natural mechanism for responding to changes quickly. SCRUM is a framework (flavour) of agile and we take elements from this that helps teams work together and adopts specific principles as outlined below:

Figure 9 - Principles of an agile delivery approach using SCRUM methodology.

During the build phase we focus on rapid development maximising configuration over development and focusing on working with out-of-the box functionality in Dynamics 365 and our **smart***Apps* wherever possible:

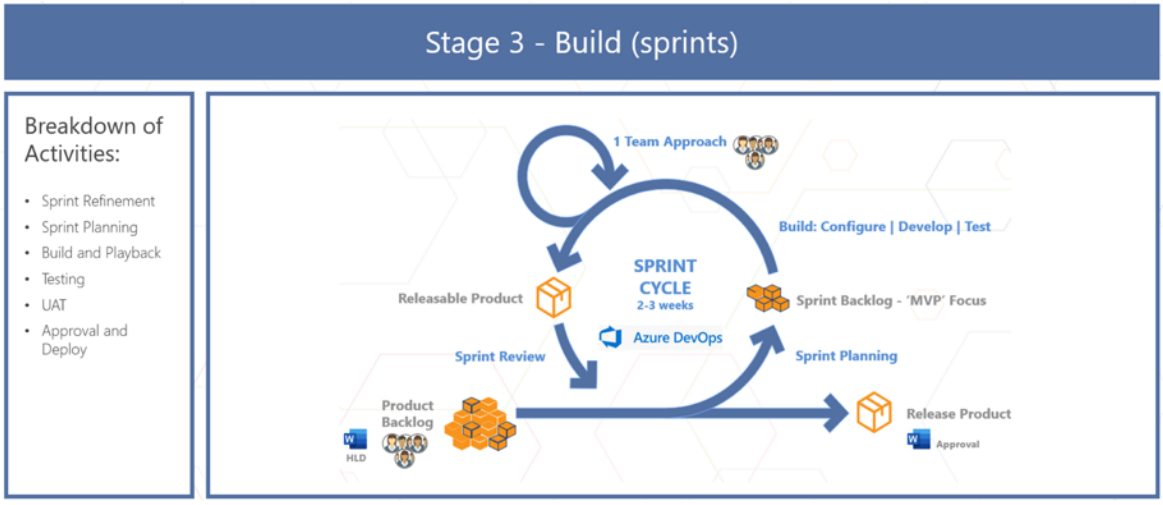

Figure 10 - Build phase sprint cycle.

Several activities occur during agile configuration sprints in the build phase which are summarised in the diagram above. In summary the discovery phase presented us with a backlog of requirements to consider for the build and we now have a high-level design containing the vision of what the solution needs to provide. Each sprint will deliver the following activities:

- **Sprint Refinement**
  Sprint refinement allows for an agreement of what should be evaluated, prioritised, and taken into the first sprint. The newly created product backlog items (PBIs) will now need to be evaluated to task level and include an assessment of effort to ensure items can be delivered within the sprint timeline. Velocity (how much capacity/resources the team has) determined by budget is key here in assessing what can be achieved within each sprint.

- **Sprint Planning**
  Following on from refinement, sprint planning involves deciding on what is to be built versus other priorities up to the capacity (velocity) of the team for the sprint.

- **Build and Playback**
  The build covers the tasks of building the PBIs/stories in line with expectation and seeking approval by the client via playback(s) of the solution.

- **Testing**
  Addressing and maintaining a level of quality remains a priority when working in an agile way, therefore during the build **smart**impact will ensure that the product is tested, is free of defects and can be released for wider User Acceptance Testing (UAT) at the end of the sprint or later in the project.

- **UAT**
  A textbook agile approach envisions that a completed sprint would include UAT and any remediation required. In theory, this then allows for a 'release' at the end of each sprint cycles, meaning the solution could go live at this point. With the type of projects **smart**impact undertakes, there are usually technical dependencies (e.g. existing systems, data migration, or integrations) that prevent this from taking place until the system has reached a particular level of development/maturity (e.g. providing support for all the business processes that an incumbent system supports so it can be decommissioned). We are always open to exploring opportunities to deploy functionality as soon as possible and will manage this on a case-by-case basis in line with our clients' plans. However, in practice, we don't expect this to happen at the end of every sprint during the client's project, so we'd envision UAT for the sprint to take place during sprints and a further cycle of end-to-end testing to take place when sprints are ready to be deployed. This approach can be adopted to suit needs and should be discussed during the initiation and discovery phases to ensure expectations are aligned.

- **Approval and Deploy**
  Approving the sprint (confirming what was built) will acknowledge the completion of the sprint and that the PBIs that have been worked on are ready for release. This allows for incremental governance checkpoints and control for all parties to monitor progress. A deployment to a separate UAT environment will normally close this phase.

Configuration sprint responsibilities

Client:

- Participate in sprint refinement meetings to confirm the scope of the sprint.
- Prioritize backlog items to be delivered in the next sprint based on their business value and impact on the project.
- Work closely with the development team to ensure that they understand the requirements and goals of the project.
- Be available to answer questions from the development team during the sprint. provide more information on this topic.
- Participate in sprint reviews to provide feedback on the product increment and help identify areas for improvement.
- Provide feedback on the stories delivered at the end of each sprint. This feedback is essential for the development team to make necessary changes and improvements

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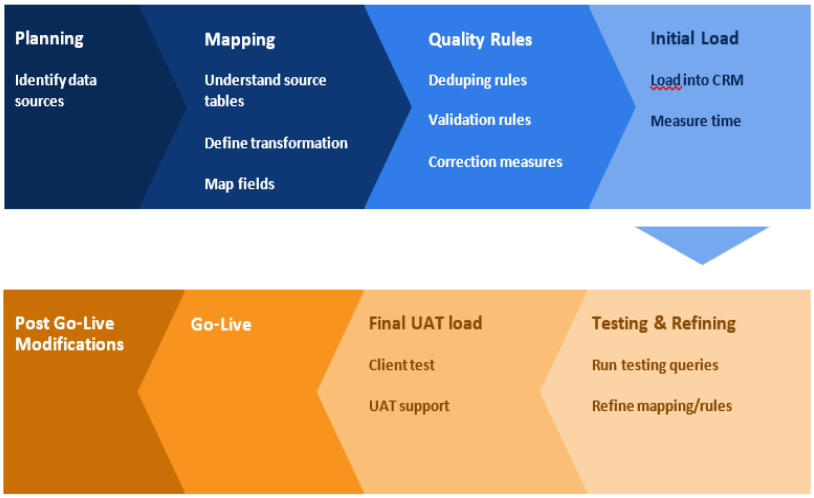
- Deliver user stories identified as a priority during the current sprint.
- Work closely with the client to understand their requirements and goals for the project.
- Estimate the effort required to complete each backlog item to stay on top of sprint and project progress.
- Develop and test each backlog item in the sprint.
- Participate in sprint reviews to demonstrate the completed work and receive feedback from the client.
- Participate in sprint retrospectives to identify areas for improvement and make necessary changes.
- Release delivered functionality to the client's UAT environment so it can be tested.

Data migration

Our data migration team is expert at improving data quality and robustness through our data migration process and another overall benefit of the project will be a streamlined data set within CRM. Data improvement and data migration is a key requirement of all the CRM projects we undertake, and our team has assisted many clients to migrate data from various data sources, including on premises versions of Dynamics, to our platform. We are experts in data mapping, managing data quality, and working with the many origin data sources (e.g. Microsoft Dynamics, CSV files, Excel spreadsheets, etc.) you are likely to be using to manage your current business processes.

While the process of data migration usually involves Extracting, Transforming and Loading (ETL) date from the origin data sources to the target system, our data migration process extends this activity to ensure the quality of the data loaded is checked and corrected if necessary.



Planning

During the early stages of the data migration process, our team will identify the different sources where data is currently held. This can include various systems such as the main membership database, website data, user spreadsheets, Microsoft Outlook etc. During this stage, the team will assess the quality of each origin data source by examining the data in each system. Input from the client will be vital at this stage to identify all the data requirements for migration to the new system.

Requirements for historical data will also be discussed during this phase with the client to decide if all or only a subset of the origin data source will need to be migrated. For example, only financial data for the last 10 yearsmight be needed. Our team will advise on best practices and discuss examples of other client approaches to data migration. It is important at this stage to understand that the quality of the data will play a key role in thesuccess of the new system. Therefore, only trusted data should be identified.

Data mapping

During this stage, our team will spend time understanding the structure of the original data sources. This may need input from the client to explain the purpose of data fields. This is largely performed by reviewing existing systems and data sources with end users, capturing information/screenshots, and highlighting any fields that need to be migrated to the new system.

Our team will undertake a mapping exercise to map the data from the origin sources to our product structure. For systems known to us, we would use previous data maps as a starting point (e.g. schemas for existing clients migrating from a particular system to Dynamics 365) with the addition of custom tables and fields identified by the client.

This exercise will produce a mapping document to for the data migration and will be refined as necessary following workshop sessions with the users. This document will list the data sources, tables (entities), and columns (fields) to be migrated with an overview of the target destination for this data in Dynamics 365 and any data-specific attributes to be set up.

This stage will also identify any data transformation required during the load. This might include setting up data lookup values so that a field can be mapped in a particular way to support Dynamics 365 or **smart***Apps* functionality in the target system.

Data quality rules

Following the planning and mapping stages, the project team will have a greater understanding of your data and its structure. **smart**impact will then be able to identify any potential data quality issues related to mapping your existing data to the new system.

By way of example, notes in legacy systems are often stored as text fields or attached as text documents to a record without any indication of which user added the note and when. In Dynamics 365, notes are timestamped and explicitly linked to an owner/user who generated the note entry. How to ingest the notes and whether to tag then to a generic user or a specific team member will be discussed and agreed on at this stage.

In addition to the quality issues that may be identified, we will work with you to identify the rules for importing data into the new system. These rules will cover:

- Duplicate records and how to handle them. Duplicate detection rules can be a single field or a combination of fields. For example:
    - Records with same email address
    - Records with same mobile phone and surname.
    - Missing data in certain fields

- Data failing validation. Examples of this could be:
    - Bank account with 2 digits sort code
    - Email address without the @ sign.
    - Data not in the correct format. For example, a first name field with data starting with a lower-case character or a date field in the incorrect format.

Correction measures will be agreed during this stage. Examples of these measures could include:

- Ignoring non-member records if they match an existing member record.
- Merging duplicate records and using the most recently modified record as the base.
- Using third party tools to clean-up certain data such as address details.
- Preparing a list of data that failed validation and needs to be manually corrected.
- Applying formatting changes such as capitalising the first letter during the import.

During this stage, we will introduce as many quality control measures as required. However, some of the data might need to be corrected or handled by the client post go-live. Usually, this data will need manual intervention and cannot be handled via an automated process. Dynamics 365 offers strong data quality capabilities such as easily merging duplicate records which can be used to enforce data quality going forward.

Initial data load

This stage begins by migrating a few records of sample data into our development environment to validate the mapping. Our team will also perform a full dataset import from all sources to identify any potential problems in any row or field of the data and most importantly to identify the overall time required for each data source to be imported.

Detailed below is an example SQL Server Integration Services (SSIS) script which has been developed to migrate contact information with timings recorded for each stage in the process.

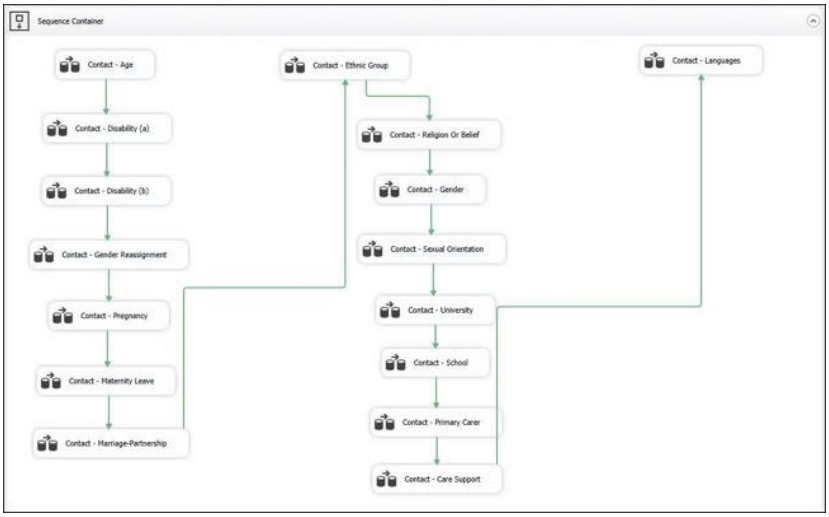


Figure 11 - Example SSIS Container for Contact Data.

Large databases can take a long time to be imported and this needs to be factored in for any planned go-live deadlines. For example, we may require a system freeze before the go-live date due to the size of data and the time it takes to copy the files to the cloud and then import them to the CRM system. We utilise a delta-load approach during migration processes to ensure that any changes to live data can be incorporated into the data migrated at go live.

Testing and refining data migration

After an initial load of the data into our development system, our team will perform multiple queries and tests to validate that the data has been imported correctly. Examples of these tests can be:

- Number of active members in the new system compared to the old one.
- Number of members by membership category
- Total amount of active subscriptions
- Total number of event attendees.

Client end users will also be provided with access to the system to verify the mapping and the data transformation if needed. Results of these tests, and verifications with the client, may lead to a refinement of the data mapping or data quality measures from the previous stages. These tests will be subject to several iterations throughout this stage until all issues have been resolved – see diagram below:

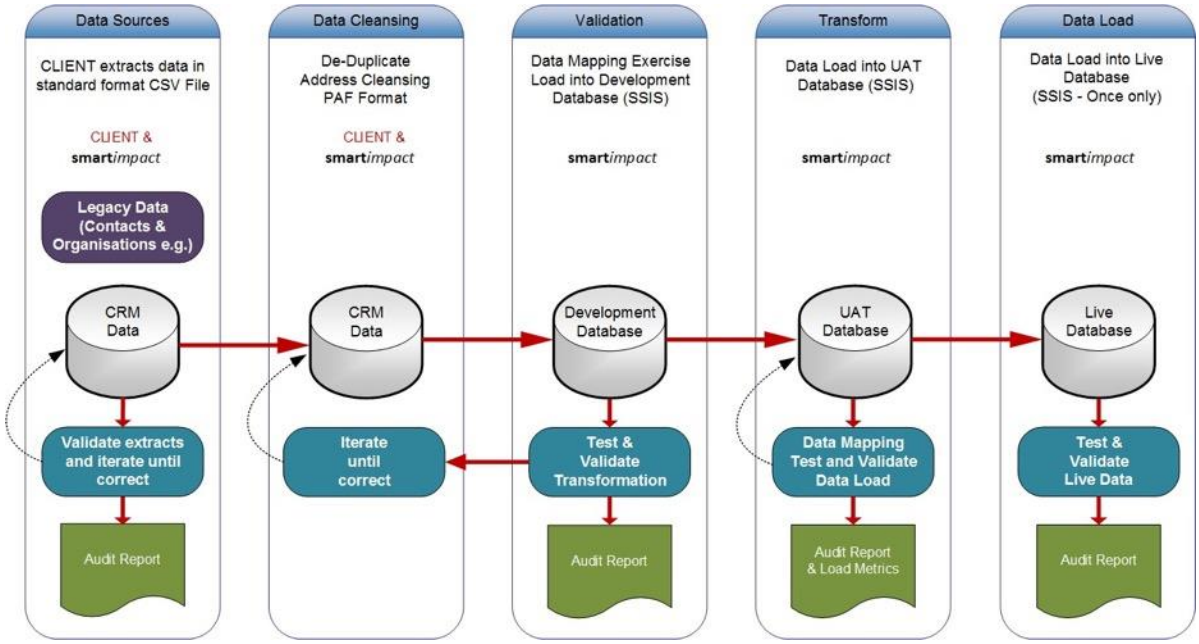


Figure 12 - Data migration strategy.

User acceptance testing of data migration

Before end-to-end testing of the entire system, our team will perform a full data load to the UAT environment ensuring that data testing is as close to the production system as possible.

In addition to performing the UAT test scripts, users will be asked to check various records and reports to ensure the data is loaded correctly. Our team will support this process by providing any required metrics or statistics.

Go-live

Depending on the length of the data migration processes identified during the initial data load, our team may require a system freeze prior to go-live to enable the data migration to complete in full. While we do our best to minimise the downtime, this may be necessary to migrate large sources within agreed timescales and to ensure that we can use a delta-load to update data from your incumbent systems before going live.

We often plan go-live activity to take place over a weekend to give both our teams time to perform any smoke tests and ensure all data is imported correctly and available for end users when they return for the working week.

Occasionally it is necessary to perform certain discreet actions on migrated data after go-live. Wherever possible these activities should have been identified and agreed during previous stages of the data migration project so that changes are planned and communicated. This might include activities such as merging duplicate records using standard Dynamics 365/Dataverse tools post go-live if this is the most pragmatic way to deal with duplicate records identified during testing.

Post go-live

Once, live **smart**impact clients benefit from several data management tools to support continual data maintenance and hygiene. Several tools exist, including:

- out-of-the-box data validation tools including duplication detection, field validation, and field options (i.e. mandatory and recommended fields);
- native integration (export and import) with Microsoft Excel for bulk data editing;
- the ability to export data from Dynamics 365 into an Azure SQL-based data warehouse using Azure Synapse Link; and
- the ability to export data and undertake ETL processes in Azure Data Factory.

Our data team is expert at utilising these tools to support ongoing data hygiene and to enables professional bodies to benefit from extensive data-orientated platform-as-a-service tools inherent to Microsoft Azure. They will work alongside the client to ensure that your data policies are appropriately enforced and delivered in the platform. We can also provide report-writing and data intelligence services when required.

Integration

Integration forms an aspect of virtually every implementation we deliver because providing access to data and services in third-party systems forms a core component of how professional membership organisations deliver services and benefits to their members. We are adept at providing seamless user experience such as single sign on (generally using frameworks inherent to our technology stack such as Microsoft Entra or Azure Active Directory B2C), and very focussed on reliable data integration. To form part of your service offering, integrations need to work properly all the time. Integration can be a challenging task, particularly if it is executed poorly. However, when it's when done well by an integration specialist like **smart**impact it can transform the ease of use of a business system and data estate.

There are two broad approaches that **smart**impact utilises with its clients to deploy integrations:

1. A client-led approach would entail **smart**impact exposing service endpoints from our API and the client (or other client suppliers) developing their own integrations with third-party tools.
2. A **smart**impact -led approach where our development team delivers programmatic integrations on your behalf.

For the purpose of our response, we are assuming that **smart**impact will deliver the integrations described in the RFP, but we recognise that identifying work that the client (or other client suppliers) could take on themselves will form part of the dialogue during the discovery phase of the project.

smartimpact utilises several technical approaches to deliver integrations, primarily based on Microsoft Azure Integration Services (https://azure.microsoft.com/en-gb/products/category/integration). Critically, we will work closely with the client during discovery to determine the most cost-effective and technically straightforward approach:

- **Power Automate Connectors**
  Power Automate provides several out-of-the-box connectors that enable low/no code integrations with Dynamics 365 and Power Platform. Although Power Automate connectors are rarely the solution for integrations that require significant volumes of data transfer, they are extremely suited to "if that then" integrations between systems where actions in one system trigger a workflow or process in another. Microsoft publishes a list of out-of-the-box Power Automate connectors online (https://powerautomate.microsoft.com/en-us/connectors/) and it is possible to set up custom connectors for commonly deployed automations (https://learn.microsoft.com/en-us/connectors/custom-connectors/define-blank).

- smart**connector**
  smart**connector** is used extensively throughout our client base to achieve integration with a wide variety of common business systems used by professional membership bodies (e.g. finance systems, legacy membership systems, web portals). It provides low/code data exchange based on the core Microsoft Dataverse Web API, ensuring compliance with Microsoft's development roadmap and making it easier for third-party developers to access the data they need for integrations via XML or JSON.

- **Microsoft Dataverse Web API**
  A RESTful APIs, which enables developers to work with data, and table and column definitions in Dataverse. Full Dynamics Microsoft Dataverse Web API documentation is available online: https://learn.microsoft.com/en-us/power-apps/developer/data-platform/webapi/overview

- **Microsoft Service Bus**
  Service Bus is a fully managed enterprise message broker with message queues and publish-subscribe topics that enables data to be transferred between different systems using "messages" (a container with both data and metadata to support the data exchange). The data can be any kind of information, including structured data encoded with common formats such as JSON, XML, Apache Avro, or Plain Text. Azure Service Bus is used to decouple different applications and services from each other which enables load-balancing across competing systems for safe transfer of data that requires a high-degree of reliability.

- **Microsoft Azure Functions**
  A serverless computing service that enables developers to run event-triggered code without having to explicitly provision or manage infrastructure. This platform supports a variety of programming languages and integrates with Azure services and third-party applications. Azure Functions is designed for building applications that respond to events, automate tasks, and manage data. It offers scaling capabilities, only charging for the compute resources used during the execution of the function, making it cost-effective for many scenarios.

- **Microsoft Logic Apps**
  A cloud service that we use to automate and orchestrate tasks, business processes, and workflows when there is a need to integrate apps, data, systems, and services across an organisation. Azure Logic Apps has a gallery of over 200+ connectors out of the box, which include services such as: Azure; SQL; Office 365; Dynamics 365; Salesforce; BizTalk; SAP; Oracle DB; file sharing service; and more. Where a connector does not exist, or does not implement the required business logic, a custom Logic App connector can be created by **smart**impact. The flexibility and scalability of Azure ensures current and future integration requirements can be met on demand, as business requirements change.

- **Microsoft Event Grid**
  Microsoft Event Grid is a fully managed event routing service that enables scalable, secure, and efficient event handling within the Azure ecosystem. It facilitates the building of event-driven architectures by allowing applications to subscribe to and react to events generated by Azure services, custom sources, and third-party apps. Event Grid is highly optimized for high throughput, providing real-time event distribution with dynamic routing capabilities. It simplifies the orchestration of complex workflows and automates responses to critical events.

- **Microsoft Azure Data Factory**
  A Microsoft Azure platform-as-a-service (PaaS) data integration service that allows the creation of data driven workflows in the cloud for orchestrating and automating data movement and transformation.

The key to a successful integration project is to identify the core need(s) early on, engage the relevant business stakeholders and suppliers as early as possible, and to agree the design for each integration. **smart**impact has a systematic approach to this, which starts by defining a 'User Story' for each required integration, an example of which is as follows:

"As [ROLE] I will be able to exchange [DATA] between [EXTERNAL SYSTEM] and Dynamics 365 so that I can [DELIVER OUTCOME/EFFICIENCY]"

We will also document acceptance criteria for the activity to support the user story and to be tested before release. Following this business requirement process, **smart**impact will create a technical integration design document, incorporating:

- Context
- Approach
- File Structure
- Considerations / Assumptions

This will provide us with a workplan to design the integration. We have experience of integrating many different types of system with Dynamics 365 including finance systems, learning management systems, and content management systems/websites.

How we work with third party suppliers for integration

Integration is not just down to technology or system compatibility. Your suppliers must also work effectively with each other to achieve the best outcomes. A good relationship and clear understanding of responsibilities for each party is very important.

smartimpact has integrated with dozens of third-party systems and we have a clear methodology and relevant supporting documentation to support the processes we put in place in partnership with other suppliers. To make sure each relationship is as effective as possible, we cover:

- Leadership, including supporting other suppliers with less experience.
- Workshops with suppliers and clients as early as possible.
- Production of shared documentation covering approach, roles, and responsibilities
- Regular meetings to progress projects, highlight issues, and agree resolutions.
- Technical documentation of all integration points and methods.

Proposed Integration Roadmap

In most projects we provide the leadership role for integration strategy with your staff and third party suppliers, and we are happy to work closely with the client's IT team to support this. We will deliver a clear vision for specific integrations, addressing their overall objective and what needs to happen technically for them to be delivered, as well as considering the data ecosystem they operate within and aiming to minimise unnecessary data transfer or complexity. **smart**impact has led integrations to over 80 different websites, learning management systems, payment gateways, and finance systems for our clients, delivering optimised processes and modern end-user experiences.

An example phased approach to an integration project is outlined below:

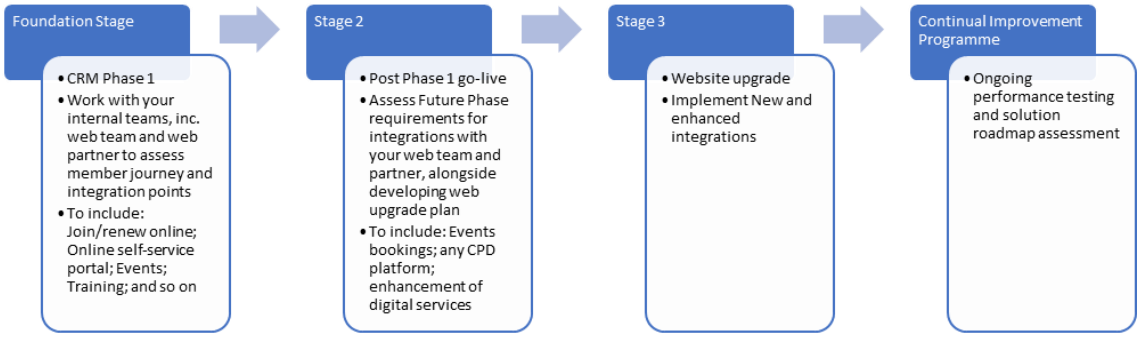


Figure 13 -Example staged integration project aligning with an agile configuration build phase.

Integration responsibilities

Client:

- Provide clear and concise requirements to the development team to ensure that they understand the requirements and goals of the integration.
- Ensure that third parties (i.e. other providers) are available to support the integration project.
- Be available to answer questions from the development team during the sprint.
- Participate in sprint reviews to provide feedback on the product increment and help identify areas for improvement.

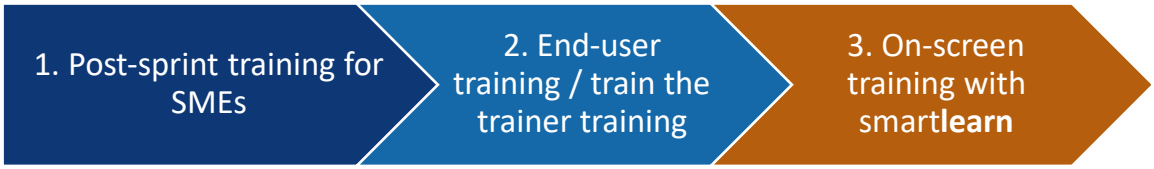
smartimpact**:**

- Formulate strategies and design architectures for integrations, deciding if these should be asynchronous, rules-based, considering the network architecture.
- Work closely with other developers (i.e. third parties) to ensure that integration projects are completed on time.
- Ensure that best practices in integration processes are followed.
- Check and correct conflicts in data configurations and overlaps.
- Devise and report on integration development plans and strategies.

Training services

smartimpact is dedicated to ensuring the success and seamless integration of Dynamics 365 in your organisation. Our approach to training is designed to empower your team with the knowledge and skills needed to leverage Dynamics 365 effectively.

We deliver training services at several stages of the project:



1. Post-Sprint training for SMEs

To ensure each sprint delivers maximum value, we provide training sessions for your Subject Matter Experts (SMEs) following each sprint. These sessions are tailored to cover the specific functionalities and modules deployed during the sprint, ensuring SMEs have a deep understanding of the system's capabilities and can provide informed feedback and guidance.

2. End-User / "Train the Trainer" training

Recognising the diverse needs of different organizations, we offer two distinct approaches for end-user training:

- **End-User Training:** Direct training sessions for end-users, focusing on practical, hands-on experience with Dynamics 365 and our smart**apps**, ensuring they are comfortable and proficient in using the system for their day-to-day activities.
- **Train the Trainer:** For organisations looking to develop internal training capabilities, we offer a "Train the Trainer" program. This approach empowers selected staff members to become in-house trainers, enabling them to cascade knowledge throughout the organization effectively.

3. On-Screen training with smart**learn**

To provide ongoing support, particularly for new users, we have provided an optional estimate for smart**learn** in our *Investment Summary*. This tool offers on-screen help and guidance for using Dynamics 365 and smart**apps** allowing users to access step-by-step instructions and tutorials directly within the interface. This feature ensures users can quickly find answers and assistance, enhancing learning and reducing downtime.

Our training regime is designed to be adaptive and responsive to your organization's unique requirements, ensuring a smooth transition and effective adoption of Dynamics 365.

Training responsibilities

the client:

- Identifying and Allocating Subject Matter Experts (SMEs) who have a good understanding of the organisation's processes and needs.
- Coordinating participation in training with their teams to schedule training sessions.
- Provide feedback on the content and delivery of training, helping to refine future sessions and ensuring they meet the organization's needs.
- In the case of "Train the Trainer" programmes, organise and manage internal training for end-users.
- Encouraging and promote the use of smart**learn** among end users for on-demand assistance, ensuring it becomes an integral part of the learning process.

smartimpact**:**

- Prepare and customise training materials based on the features implemented in each sprint, ensuring they are relevant and easy to understand.
- Conduct post-sprint training for SMEs, end-user training, and "Train the Trainer" sessions, utilising experienced trainers.
- Develop smart**learn** user guides as directed by the client and provide support and training on how to use this tool effectively.
- Assist the client in the scheduling and coordination of training sessions to ensure they align with project timelines.

Phase 4: Deploy and Handover

The Deploy and Handover phase will typically commence when **all** sprints have concluded and UAT has been signed off. **smart**impact's support team will work with our delivery team to ensure service is maintained and the solution can transition into business-as-usual services (BAU) with full support. Post warranty, this triggers closure of the formal project, assuming there is no agreed follow on works.

Figure 14 - Deploy and Handover phase overview.

Deployment is the final phase of the project and when the systems is deployed to live/production for your team to start using it. A go live plan will be produced with your team that includes all the tasks required to make this a success (e.g. moving from a sandbox payment gateway to a production version or repointing the website DNS).

Final data migration from the existing client system takes place – depending on the time this takes there may need to a system lock down of the existing client system and new data stored to be added to the Production system post go live. Training will take place as agreed in the SO.

Phase 4: Deployment and Handover responsibilities

Client:

- Ensure all suppliers are aware of go live timings and act as a central point to coordinate their go live activities.
- Set up production environment and provide access details of other systems linked to the website and CRM (e.g. bulk email system, payment gateway, postcode look up etc).
- Provide final list of users/security role.
- Communicate go live plans and any system lock downs to staff.
- Coordinate training & cascade to users (for example if the agreement is for train the trainer training).
- Conduct pre-go live system click through & data check on production system as a final check.
- Ensure all licence payments are made at least 2 weeks before the go live date.

smartimpact:

- Produce go live plan and share with client and other relevant suppliers.
- Run training sessions as agreed.
- Produce production environment.
- Final data migration.
- Configure production system as per go live plan.
- Add final list of users/security role.
- Conduct pre-go-live system click through & data check on production as a final check.
- Communicate go live status to client and other suppliers.
- Consultant availability 'floor walking' immediately post go live.

Project management

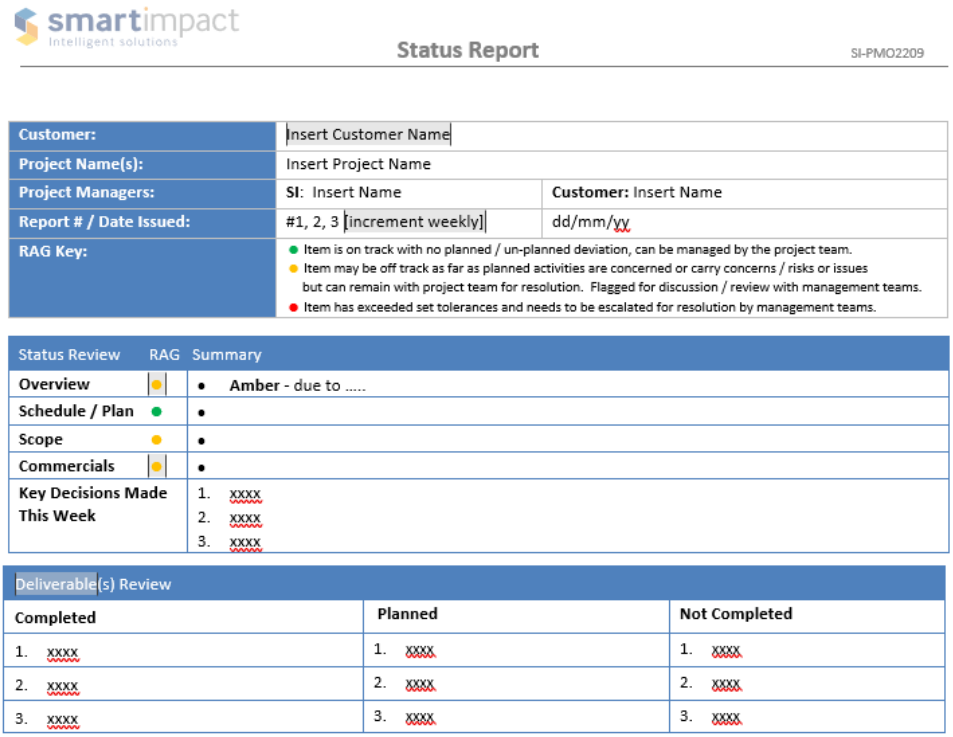
All **smart**impact Project Managers are PRINCE2 and ScrumMaster certified and have a wealth of experience managing projects of different complexity and value across a range of different sectors. We use industry standard techniques to ensure our approach is transferable and supportive of other practices. We are also used to delivering in parallel work streams as our projects/ programmes are often part of wider technology initiatives within a client's business.

During the project, our team will undertake regular meetings and stand up calls with your project team including at minimum a formal weekly project management meeting. During the build phase we will produce:

- **A bi-weekly status report** to communicate the progress of the project
- **A RAG report with a status update on all key control areas** (time, budget, deliverables, quality)
- **A RAID update** to identify key risks, assumptions, issues, and dependencies so they can be discussed and mitigated where necessary

These will be documented in the *Project Initiation Document* and provide the formal reporting mechanism for the project. In addition, we would recommend a quarterly account review meeting with **smart**impact's executive leadership team to provide a business-to-business update and to flag any strategic issues impacting the project.

We encourage our clients to carefully plan internal communications about the project to your stakeholders so they can be kept abreast of progress and any process changes that are likely to impact them



smartimpact Intelligent solutions

Status Report SI-PMO2209

Customer:	Insert Customer Name	
Project Name(s):	Insert Project Name	
Project Managers:	**SI:** Insert Name	**Customer:** Insert Name
Report # / Date Issued:	#1, 2, 3 [increment weekly]	dd/mm/yy
RAG Key:	● Item is on track with no planned / un-planned deviation, can be managed by the project team. ● Item may be off track as far as planned activities are concerned or carry concerns / risks or issues but can remain with project team for resolution. Flagged for discussion / review with management teams. ● Item has exceeded set tolerances and needs to be escalated for resolution by management teams.	

Status Review	RAG	Summary
Overview	●	• **Amber** - due to .....
Schedule / Plan	●	•
Scope	●	•
Commercials	●	•
Key Decisions Made This Week		1. xxxx 2. xxxx 3. xxxx

Deliverable(s) Review		
Completed	**Planned**	**Not Completed**
1. xxxx	1. xxxx	1. xxxx
2. xxxx	2. xxxx	2. xxxx
3. xxxx	3. xxxx	3. xxxx

Figure 15 - A bi-weekly project status report will provide a snapshot of project progress and highlight any issues that need addressing.

smartimpact **roles and responsibilities**

Several key project roles and supporting roles will be involved through inception of the project through to delivery.

A typical project structure for **smart**impact will comprise of a dedicated Project Manager and technical owner: either Solution Architect or Lead Consultant (depending on the size/complexity) and a Lead Developer. More resources will be added if the scenario / delivery model supports this:

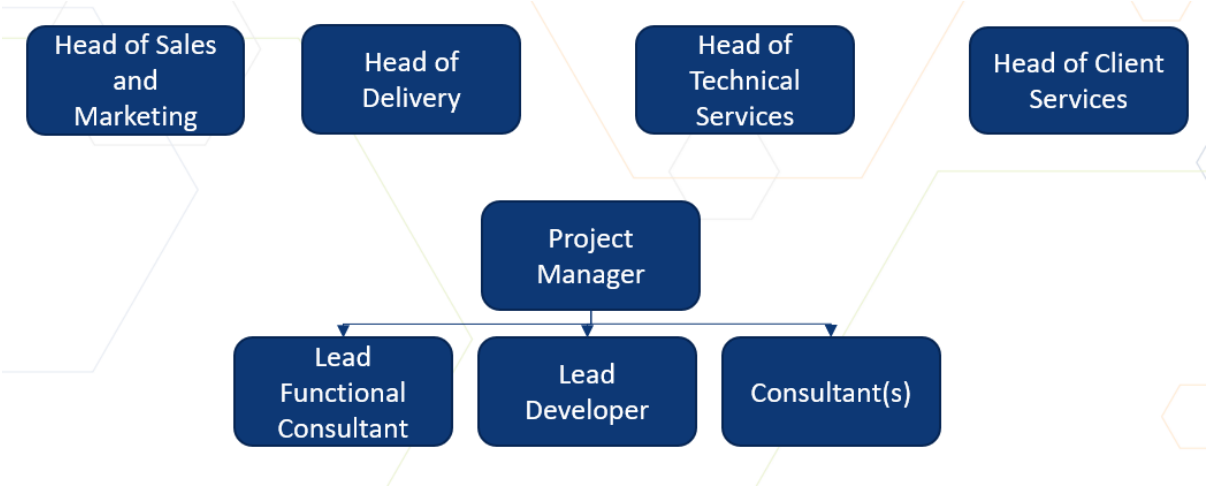


*Figure 16 - Typical **smart**impact project team.*

Supporting the project will be our various head of departments who will provide assurance for the project from their respective disciplines. Commercial, project management / governance, technical and client services / support.

The key to a successful delivery is to maintain momentum and continuity, so we will look to dedicate a Project Manager and a Solution Lead to a project. These roles will remain consistent and will ensure our engagement/collaboration with the client remains on track. Other roles will also be used but on a more specialist / ad hoc basis depending on the current stage of the project and obviously project approach. For example, Functional Consultants, Technical Consultants and Data Migration specialists will also be used at the appropriate time to progress project tasks.

Client roles and responsibilities

The following section offers an example of the types of roles and decision making that is required from a client perspective.

Please Note: not all roles are mandatory and will likely differ from one organisation to another.

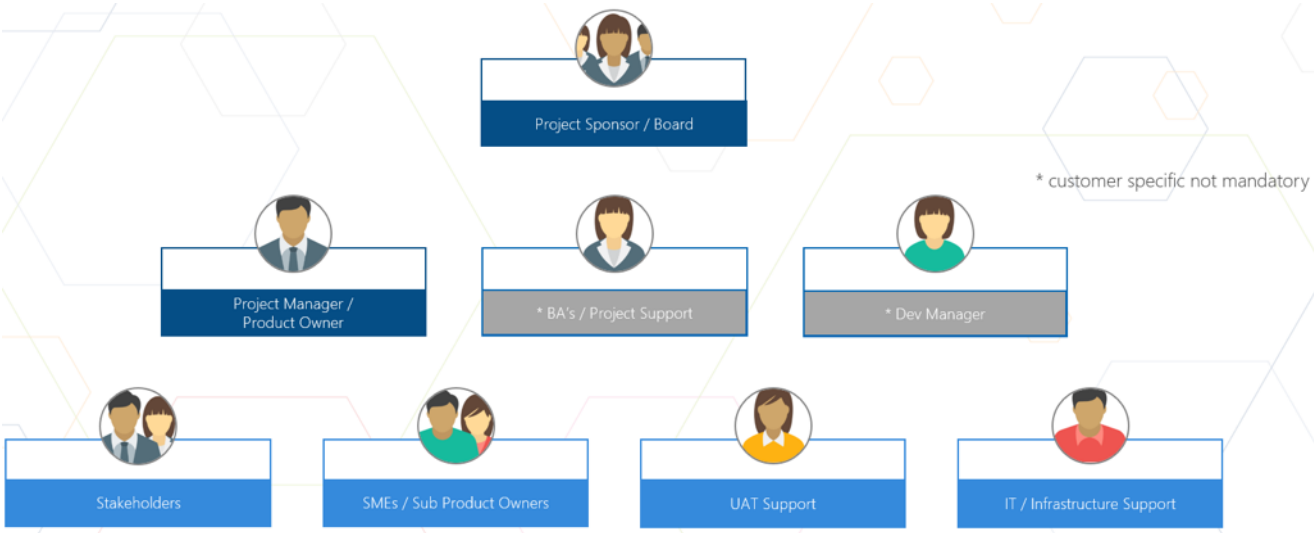


*Figure 17 - Recommended client roles for a **smart**impact project.*

For most projects, we expect that **smart**impact and our clients will combine to form a collaborative partnership to make the project a success. The diagram above details the various client roles in the overall project team. Some roles will be shared across multiple staff, and some staff will have multiple roles. Please note there are also some specialist roles that may be needed in the data migration and integration workstreams; these are detailed in the respective attached appendices for those areas.

Project Sponsor / Board

An individual (or group of people) who are responsible for executive level decision making and ultimately sponsoring the project. Has commercial and strategic decision-making power either directly or via proxy/board. This role/group will receive high-level updates from the client Project Manager re: project status and will be a point of escalation both internally and for **smart**impact.

Project Manager

This role provides day to day communication/control from a client perspective and is a key liaison role for the **smart**impact Project Manager. This role may also adopt the 'Product Owner' role for the client in conjunction with PM role as she/he should be closest to the project/business/case and should have overall day to day responsibility for project delivery from the client's perspective. This role will also manage client resources and availability for any client focused project activities and will provides updates to the client Project Sponsor / board.

Product Owner

The Product Owner is typically a project's key stakeholder. Part of the Product Owner responsibilities is to have a vision of what the solution needs to provide for the business (from a non-technical perspective) and convey that vision to the project team to ensure that the agreed Product Backlog Items (PBIs) are adhered to and built to expectation. This requires the ability to make rapid decisions and prioritise workloads (the backlog) for each sprint). In many scenarios this role is supported by 'sub product owners' which are introduced per sprint to provide niche subject matter expertise, this role then oversees the vision and management of the project from a client perspective and is often merged with the PM role.

Subject Matter Experts (SMEs)

The client PM will engage with the wider business SMEs to ensure they are represented when analysing their requirements during workshops for example. These individuals will be required to represent their subject (department, division, or team for example) at these sessions and during 'the build' when the solution is configured using the requirements identified and agreed during the Discovery phase. The same individuals are recommended to be involved throughout the project for testing (see below) and are typically utilised as 'super users' within the business leading to the project go live and beyond as they have been involved throughout whole process, are best placed to train and advise others and take ownership or supporting the new solution as it enters business as usual (BAU).

UAT Support

At a set interval(s) on the project, the client will be required to test the solution and approve its readiness for live use. The same roles outlined above typically perform this task as they will be familiar with the project journey to date, i.e., the requirements, the project objectives and the will have seen the new solution being built throughout the sprints. **smart**impact will assist with the process/steps involved with testing but will require nominated people from the client team to be assigned to testing / approving the new solution.

IT/Infrastructure Support

Throughout the project we will need to talk to your IT resource(s) or 3rd party who are involved in your internal IT provision. We will need to discuss your office 365 subscription and the setup of D365 for example, environments for where your new solution will be built, tested, and used in a live capacity and discuss maybe your current system(s), data migration and or integration (if applicable to your project). We will take care of the planning for this and the timely involvement, however we will need a technical contact(s) to discuss these matters throughout the project.

Change control

smartimpact follows a defined process to manage significant scope change identified during project execution and for any significant commercial change. The process includes:

- Identification and tracking of potential changes (via a Change Request Log - CR).
- Approvals or rejection of proposed changes.
- Financial impact to either party of such a change.
- Updating of planning and documentation.

As our solution delivery approach is agile and iterative, considered change is welcomed from a product backlog and requirements perspective. The collective team, particularly your Product Owner, will have the responsibility of selecting what requirements are in scope or out of scope for any given sprint, and therefore agile change is mostly concerned with either:

1. A deviation to the product(s) / technologies that were previously sold or prescribed as per the approval of the HLD or any subsequent Change Requests (CRs). Examples are an addition of a **smart**impact product or 3rd party add on, or a change to the integration tooling / subscription or middleware tool.
2. An extension of the budget to provide more consultancy resources. This could include ad hoc time for specific consultancy services above and beyond what have been quoted for such as additional training, workshops, design or documentation or simply more sprints of development work.

Should a change be required, it will be discussed between Project Managers and the above information will be detailed in a change request (CR). This will likely involve the following steps:

- **Analysis of 'out of scope' Change Requests**
  By default, for change requests that are determined to be outside the stated project scope, **smart***Impact* shall respond to the initial change request with an initial effort estimate for the analysis of the change request. This will be approved before the analysis work can begin.
- **Approval/Rejection Turnaround Timeframe**
  The approver shall approve or reject the change request within the timescales confirmed in the Master Services Agreement based on the receipt of the CR document (or otherwise by mutual agreement; agreed in writing per change request between **smart***Impact* and the client).
- **Resolution of Scope Disputes**
  The **smart***Impact* and client Project Managers will attempt to resolve any dispute regarding the 'in scope' or 'out of scope' classification of work by referring to the PID, the defined requirements (where applicable), and any changes, amendments, or attachments to these documents to which the parties have previously agreed in writing. If the Project Managers cannot reach agreement, dispute resolution will be escalated to the client project sponsor and the **smart***Impact* Head of Delivery (or their respective designees).

Before any change is initiated it must be agreed and signed off by the client.

Risk management

From a governance perspective, there are always risks and issues with any project. The key is to identify and mitigate them to minimise the chances of them happening or impacting the project. Risks are often unique to a project, and it is likely there will be specific risks that could not be foreseen before the project starts. However, there are common risks for a project of this nature, and these are listed below along with how **smart**impact would plan to mitigate them:

Risk	Mitigation
General risk management	We will identify and mitigate all reasonable issues and risks as part of our normal project methodology. These will be held in a continually reviewed Risk and Issues register which we will share with the client's project team. Each risk will have a mitigation, and the mitigation plan details who is responsible for each risk mitigation.
If senior and key personnel on either side leave	We always intend that the team we put onto a project is the team that stays on the project, both from our side and from the client's side. If any of our staff are unable to continue in place for any reason, we ensure we replace them with a suitable person in a seamless manner so that the project is unaffected. If a replacement is due from us and it requires any double handing or knowledge transfer, we will absorb the costs for that. If there is additional work due to key client staff leaving, we always try to absorb the costs, but we reserve the right to vary our effort via Change Control.
Client staff availability	We will make sure we understand key dates in our client's annual cycle where staff or specific departments will be particularly busy – for instance renewal time, or a major conference, or critical exams period. We then make sure that core product steps that require those staff are not scheduled at those times. We will also ask all staff to make clear and share their holiday plans and expect the client project manager to make sure that staff holiday requests are not granted until their likely impact on the project is understood and deemed acceptable.
Timeline	The Discovery phase will determine the key features that would go live for the MVP, and the project plan will be revised to confirm agreed milestones and deadlines against the client's timing constraints. This is constantly tracked against reality and targets reviewed by the project managers.

Support and maintenance

Incident support

Once you are live, **smart**impact will be your Cloud Solution Provider (CSP) and the key support desk for all the services and software we provide to you. This means we will deliver a full, end-to-end managed support service including first-, second- and third-line technical support for all **smart**impact products and first- and second-line support for Dynamics 365 and associated Azure cloud computing services.

smartimpact has a dedicated Client Services Team that runs a technical support helpdesk for our clients based at our head office in London. We deliver a full end-to-end managed support service that provides first-line support (general help enquiries) and second-line support (issues that can be fixed without further escalation), which resolves most issues raised. If issues need to be escalated further (third-line support) these will be handled by either our delivery team (functional consultants, to manage issues with solution configuration), our development team (product issues), or by escalating to the appropriate Microsoft technical support team.

During the final phase of your implementation (Phase 4: Deploy and Handover) we will organise a detailed handover from our project team to our support team. This will include introducing you to the Client Services team (see below) and confirming your requirements for warranty period support and beyond.

Our Client Services Team is structured as below:

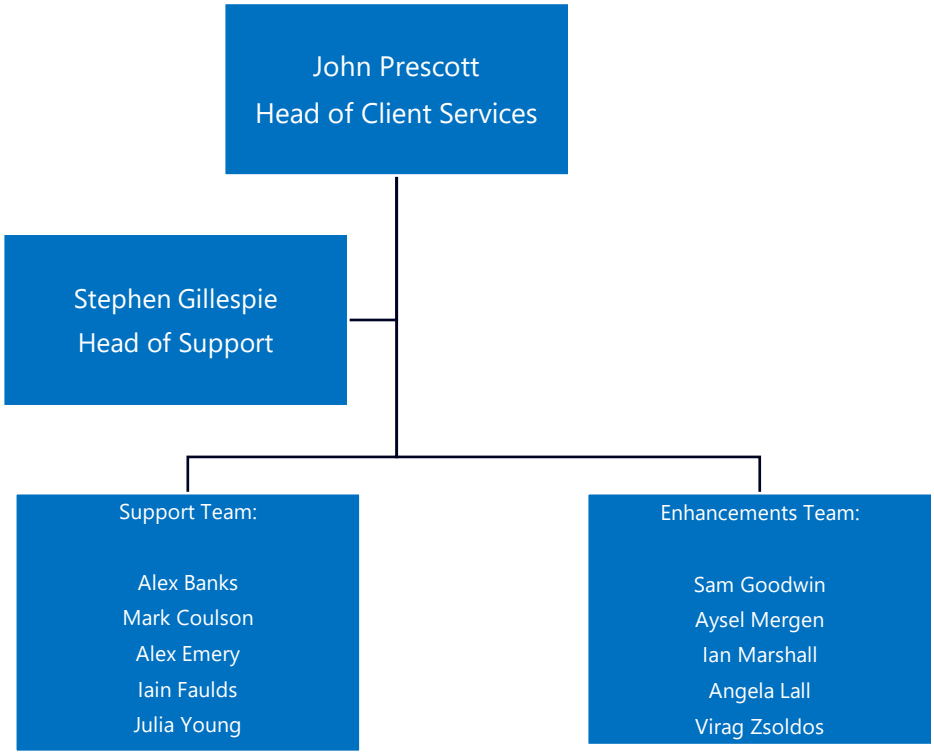


*Figure 18 - **smart**impact Client Services Team.*

Call logging procedure

Clients can contact the **smart**impact technical support desk by phone, email, or via our dedicated smart**service** portal:

- Phone: +44 (0) 208 152 4545
- Email for incident support: support@smartimpact.co.uk
- Email for enhancements: enhancements@smartimpact.co.uk
- **smart***Service* portal: https://smartimpact.co.uk/account/signin

Support desk coverage

Support desk coverage, work carried out by the Enhancements team, or Enhanced support team will be carried out between 09:00 and 17:30 Monday to Friday excluding UK public holidays. Support requests can be raised via the smart**service** portal at any time. All Priority 1 incidents should be raised via the smart**service** web portal **AND** by contacting us by telephone on 0208 152 4545.

Out of hours work

Any pre-planned work that is carried out between 17:30 and 09:00 Monday to Friday and any time on a weekend or bank holiday is classified as out of hours work. Any works pre-planned in these periods **must** be agreed by both parties and will attract an agreed out-of-hours rate. This will be presented in a separate Statement of Work (SOW) for your approval.

Our support objectives

Our Client Services Teams has several objectives in terms of supporting our clients and these guide our interactions with your team:

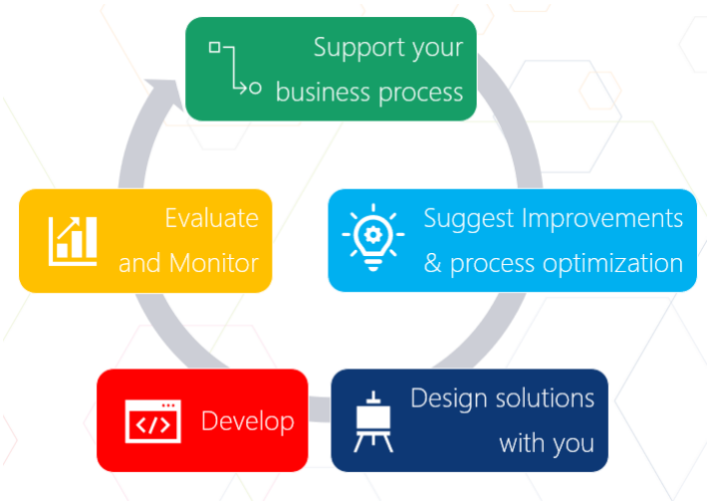


*Figure 19 – **smart**impact support objectives.*

Your incident service level agreement

All our support contracts have a standard SLA for incidents and are as follows:

Priority	Target Response Time	Target Resolution Time
1 - Critical	15 Minutes	4 hours
2 - Severe	30 Minutes	8 hours
3 - Medium	4 Hours	3 Days
4 - Minor	6 Hours	7 Days
Request	8 Hours	Planned per request

Figure 20 - Target response and resolution times.

The following table describes how priorities are identified and classified:

1 – Critical Business cannot function	• Prevents the effective use of the entire service. • Affects all users. • Implies a serious breach of security. • Has serious implications for the reputation of the client.
2 – Severe Business seriously affected	• Prevents the effective use of any major service. • Seriously affects a substantial number of users. • Implies a potential breach of security. • Has implications for the reputation of the client.
3 – Medium Business suffering inconvenience	• Prevents the use of a fully supported service by an individual. • Causes inconvenience to several users. • A user does not know how to proceed in a fully supported application.
4 – Minor Business suffers minor inconvenience	• Causes inconvenience to an individual. • Causes sporadic error messages affecting several users.
Request Business requires a change/enhancement	• A long-term request which may require investigation. • Investigation of a solution or change request. • New Users

Figure 21 - Incident priorities and example scenarios.

Escalations

In addition to the priority assessments, **smart**impact automatically escalates issues if priority 1 or 2 tickets remain unclosed for a specified length of time. This alerts members of our senior management team to the issue in case they need to take any particular action. Clients are also able to escalate issues to our Client Services management team

Support for your Azure environment

In addition to application support, **smart**impact will provide first- and second-line support for the Microsoft Azure environment that hosts your system, including managed services to optimise your CRM environment. Our client's system are managed by members of our IT and support team who hold relevant Microsoft certification and are experts in managing Azure environments. Microsoft currently operates a 99.9% uptime for its hosting services, meaning that the client will experience virtually no system downtime due to hosting issues. Microsoft also provides a range of backup and disaster recovery services that will ensure data loss minimisation and fast recovery times in the event of system issues.

smartimpact proactively monitors the Azure environment where the client's system is hosted. One of the key tools we utilise is Azure Monitor, a suite of tools built-into Azure that collects sophisticated telemetry data from the environment. Azure Monitor enables **smart**impact to collect and analyse data from your system in real-time and to use this information to maximise the performance and availability of resources and applications we are managing. Azure Monitor provides a range of alerts that can proactively notify our operations team (by text and email) of any critical conditions identified in the system and attempt to take corrective actions automatically. Azure will also support auto-scaling (if required and authorised) to enable Azure to determine the right amount of resources on the system to handle the load on your applications – e.g. to cater for periods of busy use or significant data querying. Our operations team will work closely with the client to determine as and when to utilise these services. One of the critical advantages of this approach is that it will enable us to identify the optimum Azure resources required to manage your system which will deliver the most cost-effective configuration.

Our managed services for Azure and your Dynamics 365 environments enables us to provide continual advice about getting the most from the system. Organisations we have worked with have managed to lower their annual spend with Microsoft by between 60% and 75% by optimising their license and storage profile.

As standard, **smart**impact will deploy three environments to the client when you are live with the system, and we will also set up a data migration (DM) environment during delivery to manage the data migration process. We can set up additional environments and replicate data within them if required. The three standard environments are:

- **DEV** - The development environment (DEV) allows the client and **smart**impact to build and configure customisations in line the data structure and architecture of your LIVE environment. The Dev environment does not always have full integrations with third-party test systems (i.e. finance integration), but this can be set up if required.
- **UAT** - The user acceptance testing environment (UAT) allows the client to test work performed by **smart**impact (or your internal team) and approve it before it is moved to your LIVE environment. This process minimises the impact to the LIVE environment when items are released.
- **LIVE** - This is the environment runs your LIVE/production installation of Dynamics 365. This environment will be limited in access and should be the one where LIVE activity is performed. Only completed development that has been tested elsewhere should be released to this environment. No additional development should be carried out within this environment.

This strict release process we follow minimises the impact to the LIVE environment when items are released:

smartimpact uses Microsoft Azure DevOps pipelines to manage deployments between different client environments. This enables us to support our clients with a CI/CD approach (Continuous Integration / Continuous Delivery) that means we can deliver changes to your system frequently through rapid release cycles and reliably by utilising a shared code repository, maintaining version control and environment consistency, and by using automated deployments that reduce manual error and improve quality.

Business continuity and disaster recovery

In terms of backup and disaster recovery, Azure regions are organized into geographies each of which ensures that data residency, sovereignty, compliance, and resiliency requirements are honoured within geographical boundaries. Geographies allow customers with specific data-residency and compliance needs to keep their data and applications close. Geographies are fault-tolerant to withstand complete region failure, through their connection to the dedicated, high-capacity networking infrastructure. The geography of this tenant is controlled by the client, but we think it's highly likely that this will be the Microsoft UK South region which is based in London.

The diagram shows how the Azure global infrastructure pairs region and availability zones within the same data residency boundary for high availability, disaster recovery, and backup:

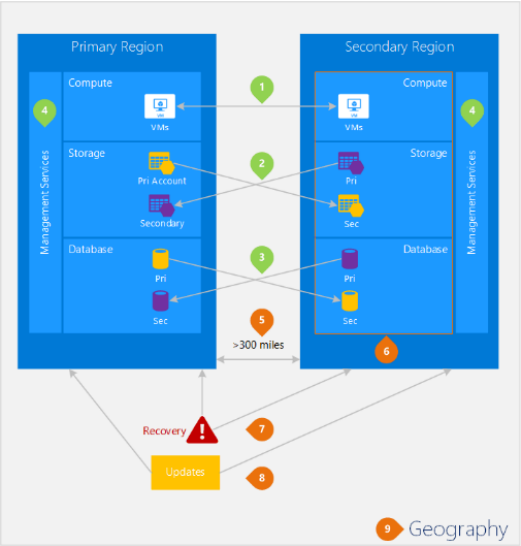


Figure 22 - Azure global geography infrastructure pairs

Our disaster recovery strategy for customer critical services benefits from the robust Azure hosting environment in place. If the need for a disaster recovery backup occurred, it would be expected that the recovery point objective (RPO - the point that we wanted to recover the data) and recovery time objective (RTO - how quickly we can recover the data) would be available within a very short time frame (seconds to minutes), therefore almost zero data loss would occur. In terms of RPO, we would have three possible recovery points:

1. The most common one will be based on the cross datacentre writes which CRM uses out of the box (we would expect the recovery point to be within milliseconds/seconds of the state of the system at the time it went down).
2. The next option would be if we choose to roll back to the last system back up (this would put our recovery point to anywhere between 0 and 24 hours depending on what time of day we roll back and when the backup was taken).

The final option would involve choosing to roll back to a custom backup (in this case the recovery point would be at the time the backup was taken).

smartimpact's disaster recovery plan is documented in our Business Management Quality Manual which is a core document in relation to our ISO:9001 accreditation. We also have a Business Continuity Plan which describes the actions we will take to maintain operations in the event of an emergency.

System updates

smartimpact develops on the Dynamics 365 Platform and therefore the client will benefit from Microsoft's *Modern Lifecycle Policy* that provides continual security patches and updates to the platform. As an accredited Microsoft partner, **smart**impact is committed to ensuring compatibility with the latest version of Dynamics 365 meaning our clients can take advantage of all the latest features in the platform without acquiring technical debt. Microsoft currently releases two upgrades to Dynamics 365 per year, and clients are required to take at least one upgrade every year as part of their licensing agreement with Microsoft. We will notify you of upcoming upgrades and give you the option to opt-in/out within this framework. Upgrades to Dynamics 365 are always undertaken during low-usage periods.

Account Management

We have a multi-tier approach to provide excellent account management which fits across the project itself, and when it has been implemented and moved over to support.

During the project

In flight projects are driven by your Project Manager and by Steve Sydee, our Head of Sales and Marketing. These individuals will be in constant touch with you to ensure that you are satisfied with the project services we are supplying, the speed at which the project is progressing, and all commercial issues. Our weekly project reports monitor progress and costs against plan, show any deltas, and enable clients to provide written feedback on any subject as soon as it becomes apparent. We also hold milestone-based strategic reviews with your senior project team, which includes our CEO, Ahmed Eltohamy. These last an hour or two depending on the agenda and are to review progress, understand any issues, and to look forwards to make sure potential obstacles are smoothed out before they become a problem.

Post-project

After the project has gone live, BAU account management moves to our Client Services team and will be led by our Head of Client Services, John Prescott. If you chose an Evergreen subscription you will also have a dedicated Project Manager to liaise with on the delivery of Evergreen services. In terms of incident support, we hold regular (either monthly or quarterly) client review meetings to analyse support tickets, SLAs, and any additional enhancement requests, as well as any other issues you or we wants to discuss. This is also the forum for identifying any ad hoc enhancements/changes that you need us to estimate for if you do not have an Evergreen subscription.

Product development feedback

We drive our products forward based on market need, client feedback, and technology advances. For instance, market need drove our evolution of smart**GDPR**, and technology advances enabled us to develop our mobile apps. Client feedback is the main driver, and a good example of this is our smart**engagement** app where a particular client wanted to track and drive engagement across multiple contact points. We developed a prototype, implemented it for the client, and continually improved it until it fulfilled all our expectations and was ready to deploy to all clients. We often undertake this type of prototype as a joint initiative with clients so they gets a significant discount in return for piloting functionality and providing feedback. We actively seek client ideas and suggestions, and many of these are incorporated into our product roadmap. Clients get visibility of our future plans at client webinars and during client review meetings.

What our clients say

We are very proud about some of the great things our clients have recently said about working with **smart**impact:

If the hallmark of a successful Membership implementation is that nobody complains about anything at all, then I think smartimpact has achieved a resounding success.

Chief of Staff

Association for Financial Markets in Europe (AFME)

*The potential that the smart**membership** Dynamics 365 platform gives us going forward is fantastic. We now have a system that can grow with the organisation. The nuts and bolts are in place and now we can add the bells and whistles as needed.*

Communications Director
Association of School and College Leaders

*I have thoroughly enjoyed working with you all at **smart**impact over the last few years and we have certainly benefitted from our relationship with you, not least because of your extensive knowledge that led to our brilliant new CRM system. It is a massive step up on what we had before.*

Senior Membership and Engagement Manager
NHS Providers

*The **smart**impact CRM system has helped make the membership renewal experience much friendlier for our members, more efficient for us and contributed to raising our annual renewal rates to 90% and beyond.*

Chief Administrative Officer
Alternative Investment Management Association

***smart**impact quickly grasped and understood the way our complex business works. They took the time to dig deep into our rules, and the obligations placed on Barristers and challenged what we thought we needed from the project.*

Head of Project Management Office
The Bar Council

We welcome your feedback.

We are always looking to improve our offering to the market and would appreciate any feedback you are willing to provide.

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