G-Cloud 14 Lot 3: Cloud Support

Hyphen8 Service Definition

May 2024

Contents

1. Introducing Hyphen8

Our History

Founded in 2012, Hyphen8 have twelve years of experience specialising in nonprofit and public sector solutions on Salesforce. Our staff includes a dedicated Service Design team who have been recruited from nonprofits for their process and best-practice expertise.

We're a respected Salesforce partner, and our experience and expertise allows us to help steer Salesforce's product design to evolve and develop the Salesforce grant management products, demonstrating our role as a thought leader. We are a Summit Salesforce partner, and we were awarded the prestigious Consulting Partner of the Year (Nonprofit, EMEA) award in 2022.

salesforce.org
2022 Consulting Partner of the Year
Nonprofit
EMEA

We're dedicated to supporting organisations to transform their ways of working through user research, Service Design, and innovative software solutions. We take a human-centred approach to all of our work, making sure we understand the needs of the people we're designing for and the problems our customers want to solve.

Grants Management Expertise

We're proud to have earned our position as the number one choice of Salesforce implementation partner for grantmaking organisations in the UK. We've had the privilege of working with over 120 funders, including National Citizen Service (NCS), Wellcome, Northern Ireland Housing Executive The National Lottery Community Fund, Lloyds Bank Foundation, Bild Association of Certified Trainers, The Hygiene Bank, as well as organisations working outside the UK such as African Women's Development Fund, the Atlantic Institute and Fidelity Foundations.

We have developed a range of solution Accelerators based on our experience and feedback from nonprofits, especially grantmakers. These tools complement standard Salesforce functionality, such as streamlining panel decision processes, avoiding costly integrations with finance systems, or by allowing grantmakers to easily capture DEI data that can be benchmarked against other funders. Our team are continually exploring and developing new Accelerator solutions based on sector needs and best practice.

Our Social Mission – Making a Difference

We work exclusively with nonprofit and public sector organisations, and we donate 8% of our time/profit every year. This is generally in the form of pro bono work for small nonprofits – we see this as a way to make a difference within the nonprofit community, and to allow organisations of all sizes to gain access to best-in-class technology and consultancy for the benefit of philanthropy as a whole.

Digital Revolution Awards
GLOBAL WINNER
Best Salesforce Partner to Work For
hyphen8

We are proud to be a female led organisation with a 50:50 gender split and a majority-female leadership team. We strive to make Hyphen8 an excellent place to work, where our team can succeed and grow in their roles. We have introduced internal mentoring and Communities of Practice to better support our staff. We were awarded "Best Salesforce Partner to Work For" at both the UK and Global Digital Revolution Awards in 2023.

Our values are at the heart of everything we do, informing how we work and the customers that we work with:

Take pride in what we do We are a trusted partner with ***integrity*** at our core	**Think creatively** We challenge ways of working and embrace innovation	**Make a difference** We add value and are focused on our philanthropic goals	**Support each other** We respect each other's well-being and act as one team
Nurture personal development We invest in continual learning to grow the skills of our talent	**Share our knowledge** We are thought leaders who strive to empower others	**Celebrate achievement** We recognise and reward contribution to our success	**Don't forget to have fun** We love what we do and share smiles along the way

2. Hyphen8 Services

2.1: User-centred Design:

Service Design: Our Service Design team challenges and transforms your processes to improve efficiency and maximise your impact. By mapping out your processes in full, we can identify areas of risk, and propose changes to help you work more effectively to achieve your mission.

Our Service Designers have joined us from funders including Comic Relief and the National Lottery Community Fund, and they bring a wealth of direct grantmaking experience and expertise. Our Service Design team can help you align with grantmaking sector best practices, improving grantseeker experiences and outcomes and making your funding fairer.

By always starting with Service Design, we can help you re-define your processes before we start designing a technical solution. This ensures that your solution truly aligns with the needs of your staff, grantseekers and grantees. It also means that we can design more efficient, effective solutions in Salesforce, reducing the time needed to deliver and therefore lowering the cost of implementation.

UX Design: User Experience (UX) Design services ensure that your services are clear, easy to navigate, and accessible to all of your users. This includes your staff, partners, and the communities that you serve. Our Senior UX Designer can work with you to ensure that user experiences are at the heart of your processes, ensuring satisfaction and reducing strain on your teams.

Including UX Design in your project will ensure that you can align with recognised Accessibility standards including Web Content Accessibility Guidelines (WCAG). Making your services accessible is vital to ensuring that your funding is fair and equitable, and will help you to tackle economic inequality while promoting equal opportunities for your stakeholders.

User Research: We can facilitate discussions and research with your users (including your applicants and grantees) to find out what they really think about your services. By conducting thorough research on your behalf, we extract valuable insights from user feedback and propose actionable suggestions for enhancing future iterations. This process ensures that your funding initiatives remain both effective and equitable.

2.2: Salesforce for Grants Management

While we extend our support to a diverse range of nonprofits and public sector entities, our core expertise lies in grants management. With a track record spanning over 100 grantmaking organisations, including industry giants like Wellcome and Comic Relief, we specialise in crafting tailored solutions that drive impact.

Our involvement extends to supporting public sector entities such as the National Citizen Service (NCS) in kickstarting their grant programs. Spearheading our technological endeavours is our Chief Technology Officer, Daniel Probert, who actively contributes to Salesforce's product design group, shaping the evolution of their Grant Management products.

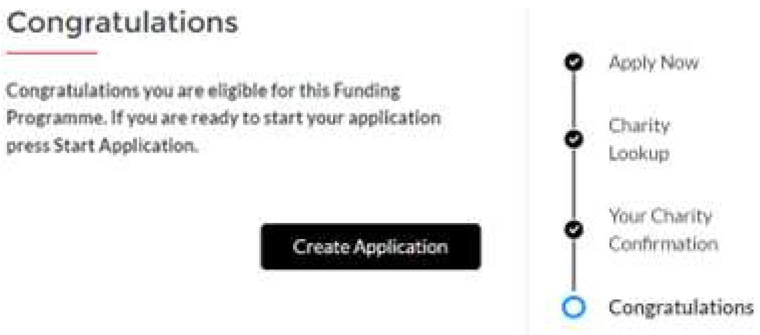
At the heart of our approach is a commitment to designing solutions that precisely match user needs while optimising license usage to minimise long-term costs. Leveraging Salesforce Public Sector Solutions or Nonprofit Cloud as our foundation, we employ a templated approach to deliver grants management-specific functionalities to public sector organisations. This includes:

Flexible Data Collection (Application & Monitoring Forms)

We use Salesforce tools such as OmniStudio or Flow to build intuitive data collection workflows. These enable us to build complex application processes, including eligibility checking, while presenting a clear and easy to use interface to grantseekers.

OmniStudio provides a guided user experience to applicants, and clearly shows them the stages that they must complete. Enhanced UX capabilities can be configured to streamline application processes, and can include advanced tools such as Lightning Web Components that can bring information from various data sources.

We can configure OmniStudio forms to check data against data sources such as the Charity Commission database to automatically populate data and confirm eligibility. Simplifying these data collection processes reduces barriers to entry and improves user experiences when interacting with your services. It also reduces the burden on your internal teams, allowing them to concentrate on their core roles by reducing the number of grantseekers who need assistance completing their application.



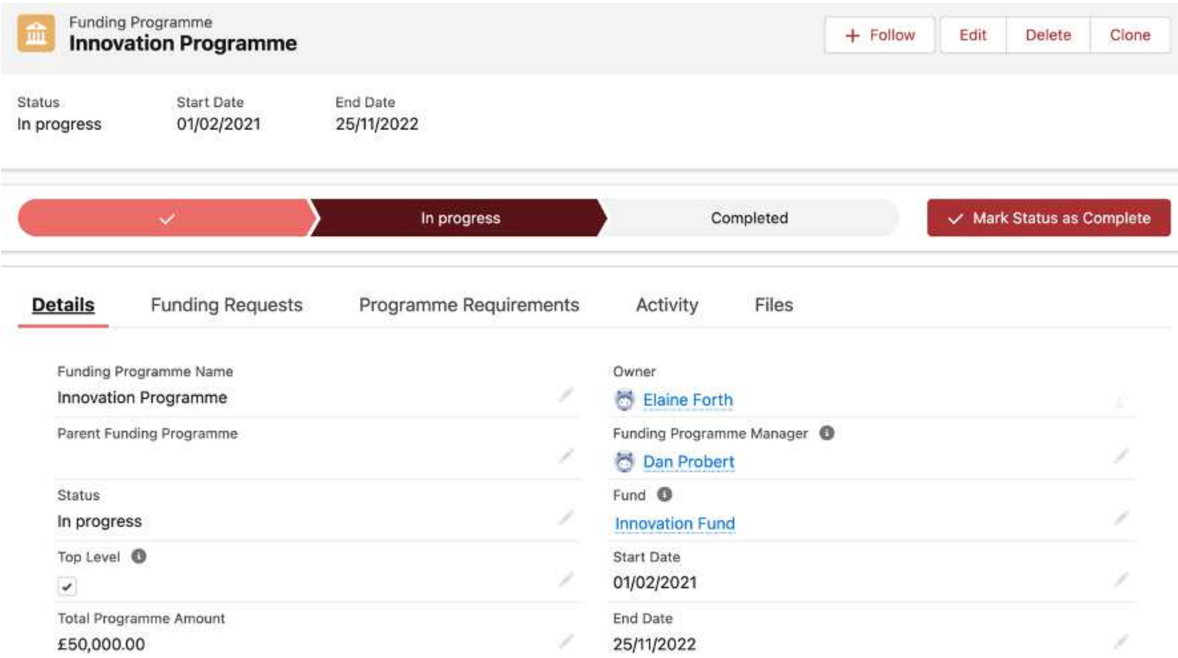
These forms can be configured to give a consistent look and feel with an organisation's branding, including alignment with GOV.UK standards and guidelines.

Simplified Grants Programme Creation

Your team will be given the ability to edit and create new funding programmes, or easily start new rounds of funding with defined funding and dates. They will be able to define specific eligibility criteria and schedule a programme to activate/close on a certain date. Users have the ability to:

- Specify participants
- Customise form questions for different scheme applications
- Re-open closed schemes to specific users
- Input specific Programme Requirements (e.g. bank details, monitoring reports)
- Manage assignment of internal / external reviewers including groups of reviewers

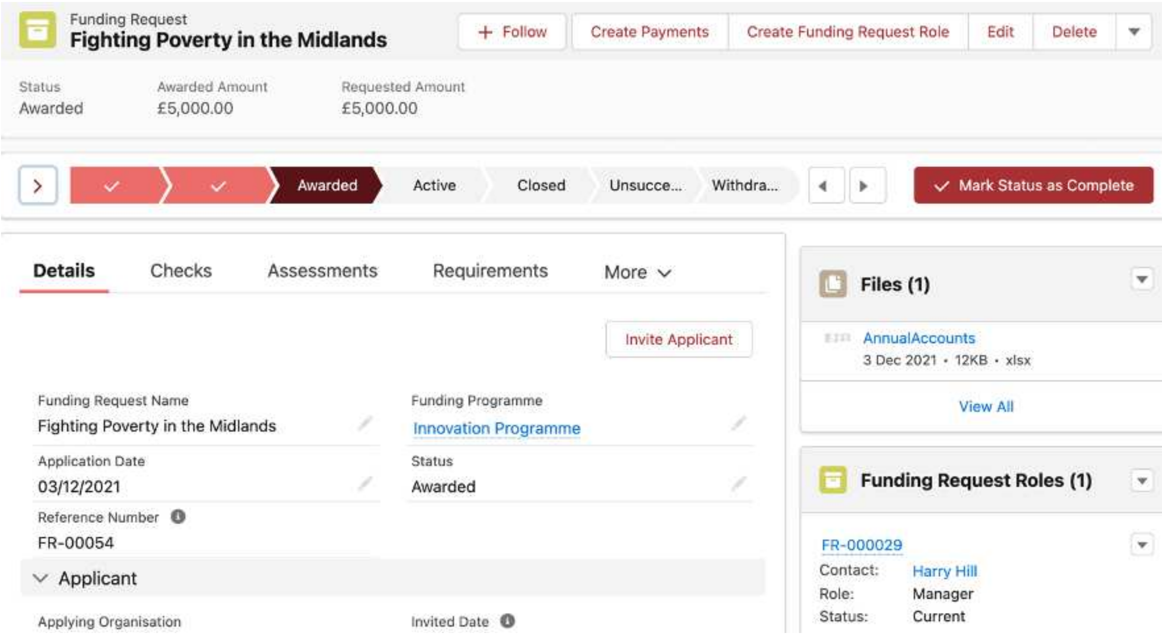
Existing programmes can be easily "cloned", meaning that your users can easily start a new funding stream with minimal effort, retaining settings and requirements and letting existing forms be used and amended as needed.



Handing New Grant Applications

After an applicant has submitted an application form, records in Salesforce are automatically created, capturing information submitted on organisation, contact, funding request, budget and any related document attachments.

Once received in Salesforce, the progress of the application can be tracked using a visual status path which can display guidance for success to guide the grants user on the process that should be followed.

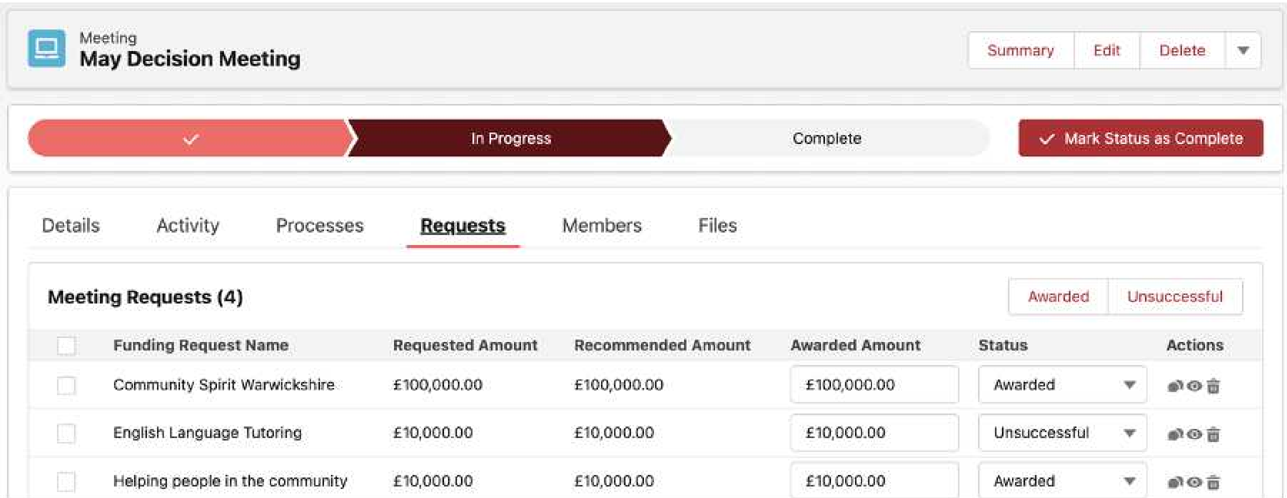


New applications can be automatically assigned to specific users based on criteria or can be submitted to a general queue to be assigned manually.

Decision Meetings

Meeting records can be created for any type of decision point using our Decision Meeting Accelerator for Salesforce.

- Create meeting templates to determine the criteria for applications to be reviewed in the meeting (e.g. by status or programme)
- Automatically import qualifying and relevant applications
- Record the meeting attendees
- Attach meeting minutes or other documents
- Enter decision outcome, awarded amount and comments on a single screen either during or after the meeting
- A single application can be submitted through one, several or no decision meetings depending on the type defined



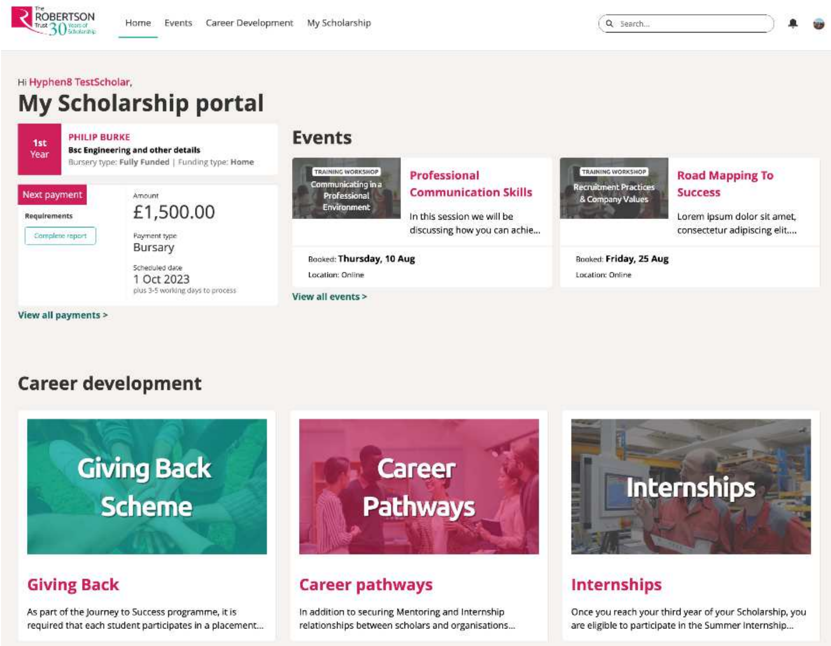
Recommendation reports can be automatically generated to summarise application and assessment information for decision meeting members.

Decision meetings can be accessed through Salesforce by internal users, or presented to external stakeholders via an Experience Cloud portal interface (see 2.2).

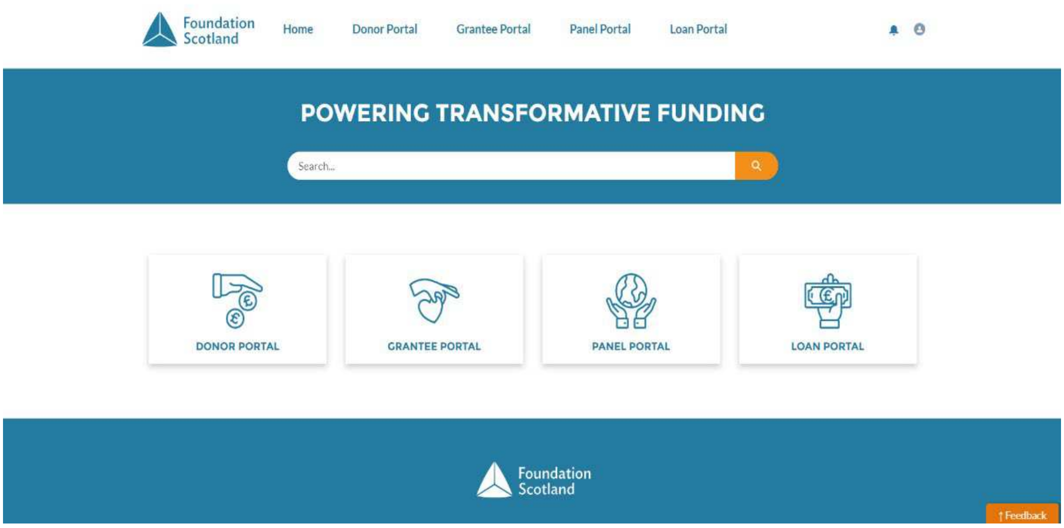
2.2: Salesforce Experience Cloud Portal

Experience Cloud is Salesforce's portal solution, allowing you to share data with (and collect information from) external users, such as grantseekers, active grantees, assessors / peer reviewers, and other external partners. System administrators have the ability to share specific fields and information with external stakeholders, making it perfectly suited for grantmaking.

We've designed and built Experience Cloud portals for many grantmakers, giving a rich portal experience to applicants and removing the need for other third-party tools. Our UX Designer can work closely with you to ensure that your grantee portal is user-friendly, easy to navigate, and accessible to all.



We recognise that some users may fulfil multiple roles. Depending on a user's specific use-case, they can be presented with an interface that matches their needs.



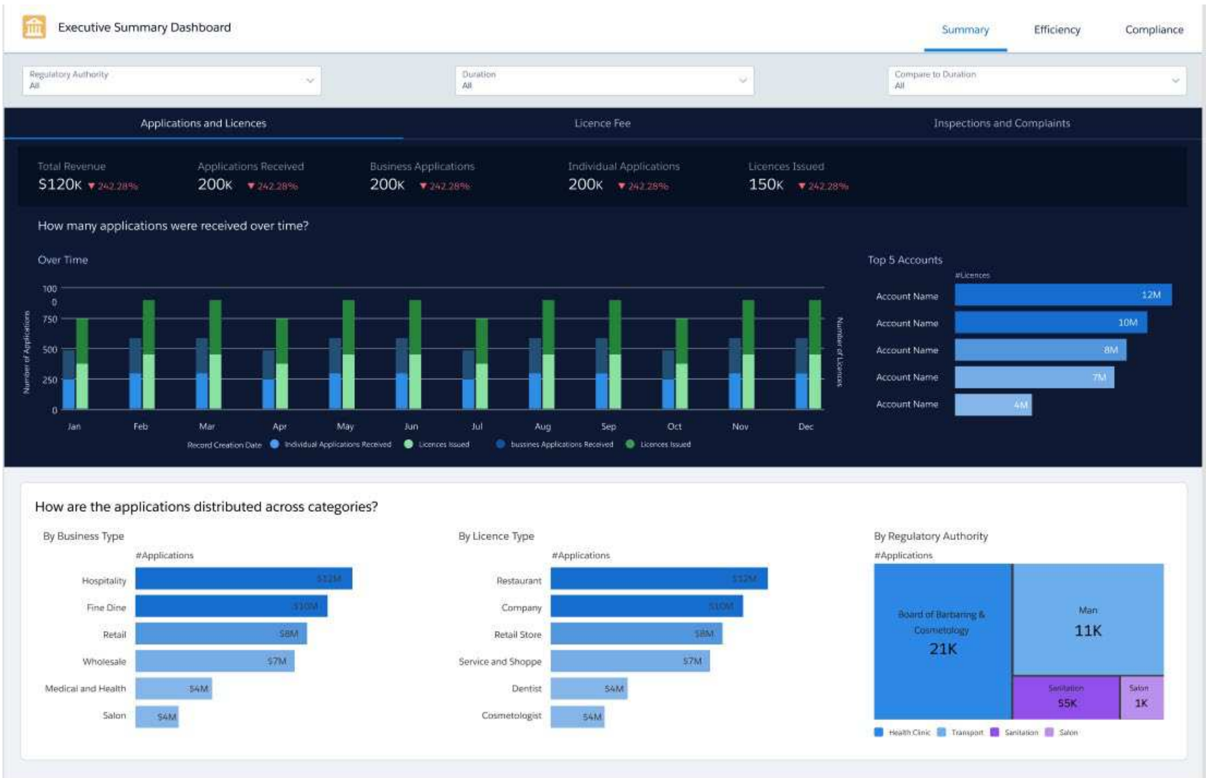
2.3: Salesforce Marketing Cloud Account Engagement (Pardot)

Communicating with your grantees and wider network sometimes justifies an investment in marketing automation software to better understand and engage your stakeholders. Salesforce's Marketing Cloud Account Engagement software lets you build deeper, connected journeys for your applicants, and more easily measure the impact of your communications.

We've built Marketing Cloud Account Engagement solutions for a number of leading nonprofits, including for Kidney Research UK for their Make Your Mark living kidney donor campaign which launched in 2024.

2.4: CRM Analytics (Tableau) for Enhanced Reporting / Data Visualisation

Salesforce CRM Analytics (formerly Tableau) is a leading data visualisation software platform. Augmenting Salesforce's native reporting functionality, it gives automated insights and data-rich, interactive dashboards that could be used to give in-depth views of your performance against your chosen impact model.



2.5: Salesforce Solution Design

Every engagement starts with an in-depth Discovery phase, letting us work together to understand your requirements, challenges and aspirations. We suggest better ways of working, helping you to streamline your workflows and align with funding best practice. In this phase, we will:

- Identify pain points
- Challenge processes
- Suggest alternative ways of working
- Share best practice that has worked for other funders
- Consider the user experience – both internal and external

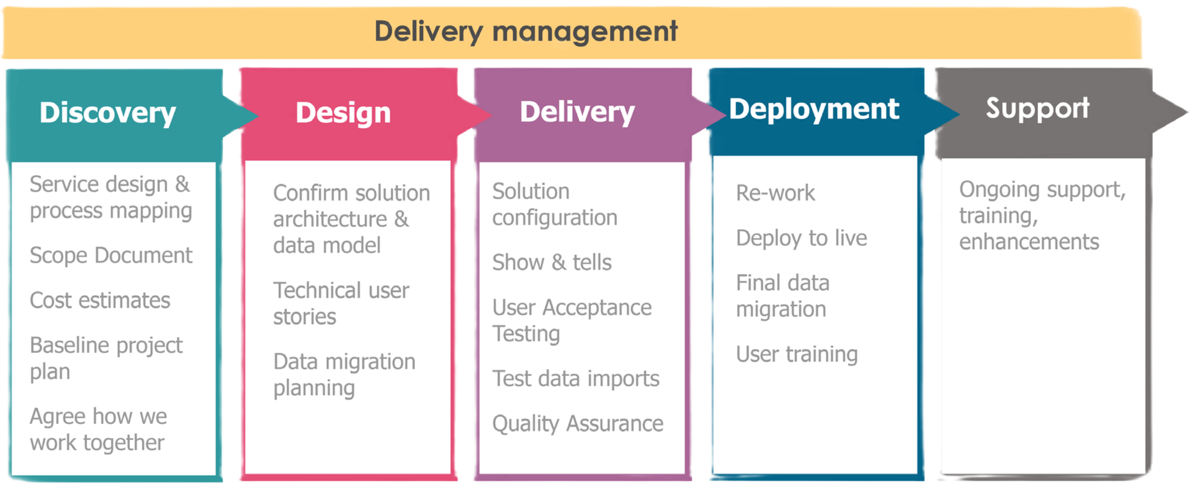
Once we've agreed on what your solution needs to look like, our technical Solutions Consultants work closely with our Service Designers to design a solution in Salesforce that will meet your needs.

All solution designs underdo a rigorous Quality Assurance (QA) testing process by our Chief Technology Officer or a Technical Architect, ensuring that the solution is technically viable and aligns with industry standards and best practices.

We collaborate closely with our customers to agree any further changes that might be required, before we share a full statement of works for our proposed solution.

2.6: Salesforce Implementation

We have a Delivery Framework in place which ensures all of our projects follow best practice. Each project goes through the following key phases:



All development work is completed in a "Sandbox" environment, with testing taking place before it is deployed to the live "Production" environment.

Throughout your project, a Hyphen8 Delivery Manager will be responsible for maintaining and encouraging input into a risk log developed at the start of the project. Common risks associated with this type of project include:

- Delays caused by lack of internal capacity in your project team – can be mitigated by being realistic from the offset and building this into the baseline plan and agreeing in advance that go live dates will be affected if sufficient input / testing has not been possible
- Scope creep which may impact budget / timings – this can be mitigated by clarifying scope in detail early on, rigorous delivery management and adherence to change request management
- Delays to decision-making if teams require senior authority – this can be mitigated by empowering the project team, and by ensuring that there is a senior sponsor for quick decision escalations.

We'll work closely with you as an extension of your own team during the implementation phase, ensuring that we can mitigate against the above (and other) risks to progress.

When we "Go Live" with your new Salesforce solution, we'll work with you to minimise disruption for your team and for your external users. We factor this into project planning:

- Go Live timed to avoid peak grant application submission times
- Agree a clear and careful transition from your legacy grants management system to Salesforce, including contingency planning for accessing legacy data sources
- System downtime can be timed to coincide with user training / non-working days
- Advance communication with external stakeholders to inform them of application submission timings

Ahead of Go Live, we also begin a handover process with our Evolve support team so that they are familiarised with your system set-up and are ready to support your teams (see 2.8).

2.7: Salesforce Training

We're passionate about ensuring our customers are self-sufficient and only relying on external partners for support where technical skills are not available. We recognise that a project like this is as much a "people project" as it is a "technology project". This is particularly when one of our key pain points is the lack of understanding of the team on how to use the system.

At the start of our work together, we would work with you to design a knowledge-sharing and training programme that suits your culture, your budget and how involved you would like to be and can include:

- Short show and tells / videos of configured processes as they take shape
- Instructor-led training sessions (assumed virtual but can be in-person) with general Salesforce / role-specific content and advanced system admin sessions
- In-app guidance for users to be guided dynamically through processes relevant to the screens they are on. Using native Salesforce tools (In app guidance, status path guidance for success) and free Hyphen8 Dynamic Help accelerator
- Short crib sheets to summarise main steps
- Curation of recommended Trailhead modules – Salesforce's free online learning portal (www.trailhead.com)

If there are additional specific training requirements (e.g. users with visual impairments), we can make further recommendations. A typical high-level training outline could include:

Session	Description
System Navigation	Provides users with a basic understanding of how the system works. Includes training on CRM functionality, searching and navigating around the system. Increases confidence ahead of more detailed training. All users should take this session.
End-to-end Grant Making	Users have the opportunity to take a grant from application received to active.
Introduction to Reporting	A general introduction to accessing reports and dashboards, suitable for all users.
Advanced Reporting	Builds on the introductory reporting session. Aimed at data users and super users. A practical session where users learn to create, edit, manipulate, and export reports.
Finance Training	Training in managing payment runs and other finance areas of the system.

2.8: Salesforce Support / Managed Services

Hyphen8 offers ongoing support through our dedicated managed support team, Evolve. This provides trusted resources to act as an extension of your in-house team to boost capacity and carry out configuration that you don't have the internal skills or time for.

Our managed support programme provides ongoing support for customers to optimise their use of Salesforce. A dedicated team of experts provide consultancy, configuration, development, and training. We currently support over 100 nonprofit and public sector customers.

- Contracts run for at least 12 months, and are paid for in advance (or different invoice timing can be agreed)
- Additional top-ups can be requested during the contract period
- Fixed day rate for all Hyphen8 team members
- A dedicated Account Manager to help you get the most out of your Evolve Period
- Cases are submitted by assigned users via our Experience Cloud portal or a via a quick case email address. On the portal you can track case progress and time used.

The service is designed to be flexible. You can use it for whatever you need. Our customers tend to use it for a range of support including:

- Top-up training for staff or new starters
- Changes or fixes to existing configuration
- Implementation of enhanced functionality in line with phased development
- Advice on best practice or to discuss possible future ideas

Use of support time varies significantly depending on how self-sufficient a customer becomes. Wherever possible, we encourage our customers to be able to manage as much of their Salesforce org as possible, allowing our time to be provisioned for changes and further development. However, sometimes this is not possible due to their own internal time restrictions. In those cases, time can also be used to supply basic system admin tasks such as user management (e.g. creating new users, resetting passwords).

3. Business Continuity / Disaster Recovery

Salesforce is a leading platform with robust business continuity and disaster recovery countermeasures in place to ensure that customer data is protected and to mitigate against disruption. They have developed a global Business Continuity and Disaster Recovery Programme for their services, and continue to develop their policies in this area. All data held in Salesforce data centres is co-located at a mirror site with real-time synchronisation, ensuring that customers are not disrupted.

As a partner of Salesforce, we work with our customers to ensure that the most appropriate licensing is selected, and can guide you in developing your own Business Continuity and Disaster Recovery policies and procedures where these relate to your Salesforce instance.

4. Onboarding / Offboarding Support

Every Hyphen8 customer is assigned a Delivery Manager or Project Manager who acts as your primary point of contact. They (along with the Lead Consultant, Service Designer assigned) would work closely with you in the initial Discovery phase, as well as the following implementation.

As reflected in section 2.6 above, our Delivery Framework includes onboarding support to transition new users to Salesforce onto the platform, and to commence support through our Evolve Managed Service support platform.

To ensure sufficient support around Go Live, we offer our customers a "Hypercare" option, giving extended access to the dedicated project team to:

- Help with user adoption, onboarding and additional training
- Single point of contact to deal with any needs during the early stage of usage
- Resource to help set up user documentation or in-app guidance

If a customer decides to move away from Salesforce or our services, we can provide guidance and support on how to make this transition safely and securely, ensuring that your systems remain operable, your users have consistency, and your services are uninterrupted for those that access them.

5. Service Constraints

There are no service constraints. Please note that where data migration services are in scope, we do not offer data cleansing services – we expect that our customers will take responsibility for any data cleansing or de-duplication that is required ahead of a migration.

6. Service Levels

Evolve (as outlined in section 2.8) is our flexible managed service offering, and ensures that you get the highest possible value from your solution, along with the self-sufficiency to maintain it yourself where possible.

We have a comprehensive Service Level Agreement which outlines our obligations to our customers. Response and resolution times vary depending on severity, and issues are assigned a severity rating from 1 (most severe) to 3 (least severe) depending on the specifics of the case.

Each severity category is assigned a target resolution time. We aim to resolve significant issues within 4 - 8 working hours. Minor issues are resolved within 5 working days. Where a resolution cannot be affected in that time, we will endeavour to develop a plan and have communicated it back within the same time frame. We are available Monday- Friday (excluding bank holidays) from 9am to 5.30pm only.