Service Definition Document

Contents

Arriga CRM

Arriga was conceived by a team of highly experienced CRM consultants who saw a need for a new sort of CRM implementation company. As independent CRM consultants, they were uncomfortable with how much implementers were charging their clients for even the most straightforward of projects.

This raised the question: 'what would the ideal CRM implementer look like?'

The results of those discussions became the blueprint for Arriga.

Arriga CRM was launched in 2016 to deliver the vision of a super-efficient CRM implementer, delivering powerful, transformative results, quickly and cost-effectively, using the methodologies that the team had honed over the previous decades.

Key Differentiators

Results oriented

Our focus is to help clients generate real and sustained benefits from their investment in CRM technology.

This might seem all seem rather obvious. After all, why else do businesses invest in CRM software? But in our experience many implementers are decidedly sketchy when it comes to the finer detail of helping their clients harness the power of technology.

Our approach, based on several hundred CRM implementations, is centred on successful business outcomes. Whether that's by helping grow sales, increase profits, reduce costs, or introduce operational efficiencies.

That results orientation is embedded in how we talk to our clients about their business needs, right through the implementation, go-live, and on-going support services.

Our philosophy is simple. We're only successful when we contribute to our clients' success.

Independent

We work with a wide range of CRM technologies including market-leading applications such as Microsoft Dynamics CRM, Salesforce, Sugar CRM, Pipedrive, Mailchimp, Dotmailer, Mautic, Click Dimensions as well as a variety of reporting and integration tools.

This means we can find and deploy the most appropriate technology to address both needs and budget.

This also means we're not motivated to encourage clients to buy new software when there is already a system in place. We are just as happy helping clients get more from existing software as implementing new technology.

Experienced and efficient

Using an implementation approach which we have refined across hundreds of CRM projects, and a team of some of the most capable and experienced people in the industry, we can deliver transformative CRM systems, quickly and cost effectively.

Implementation Approach

We run our projects in a controlled yet highly collaborative way. By taking this approach, we ensure that any system we deliver is completed on time, on budget and supports the required business processes from go-live. This in turn allows value to be gained from the system as early as possible.

By embedding ourselves in your business throughout the whole process we aim to quickly understand your processes, work with you to ensure that the solution we implement resolves any issues identified and provide knowledge transfer to your own staff.

Our project methodology takes key elements of a traditional "waterfall based" approach and blends them with the key principals of agile development, namely early sight of development and regular feedback between you and us.

Traditional "waterfall based" projects rely on a non-iterative sequential plan where tasks follow in a logical order until project completion. This approach offers the most structure and control. In contrast, agile development relies on very little forward planning. Instead, progress is achieved through a series of iterations, each one run as its own mini-project. Agile development offers more flexibility and, most importantly, a high degree of collaboration between customer and supplier. The cost of agile is sacrificing a degree of control and certainty.

By combining principles from both these approaches we aim to provide maximum project control coupled with a high degree of collaboration and flexibility.

Stages

All our projects go through 4 key stages; planning, implementation, deployment and post-live user adoption.
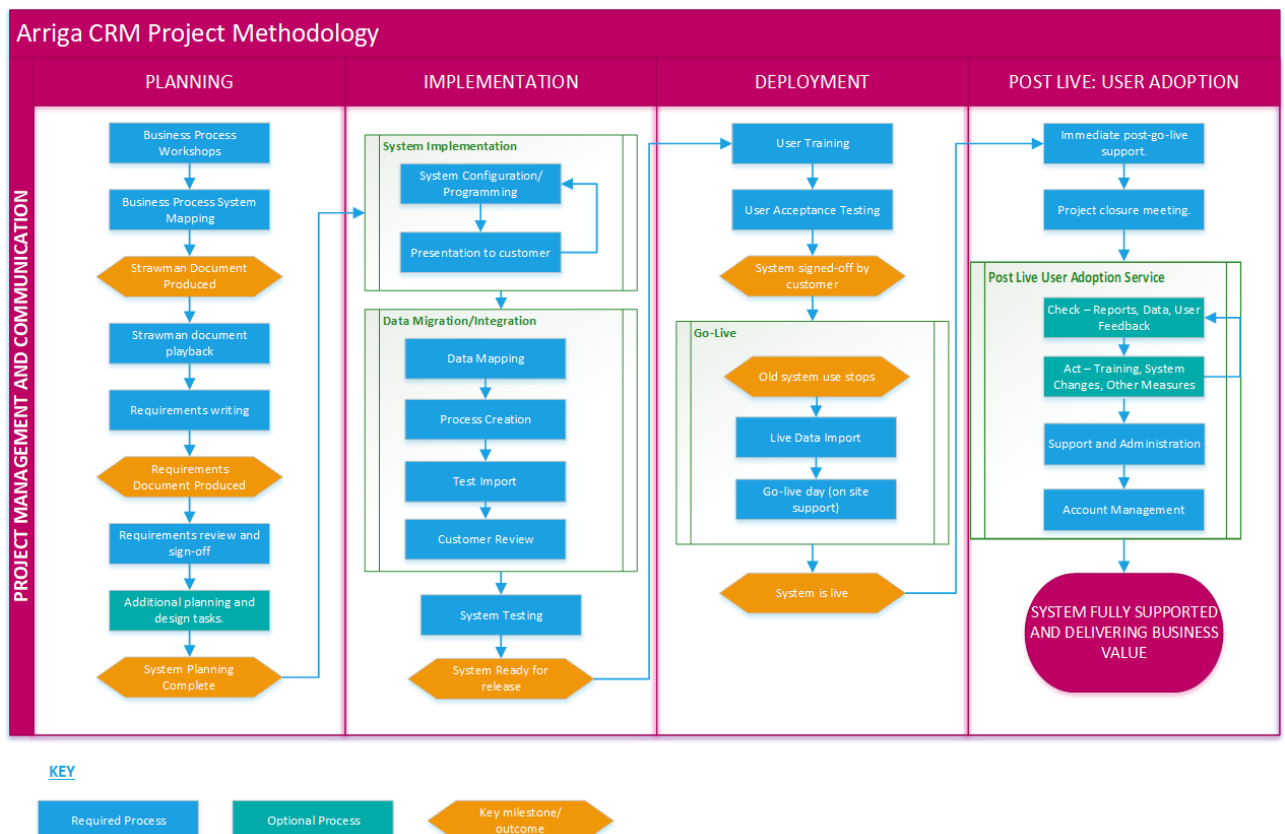
Planning Stage

We believe that time spent planning a project will translate into lower implementation costs, less risk of scope creep and increased return on investment due to a better fit with your business. We do not undertake the implementation of any project that does not have a documented set of requirements that has been formally signed off by the customer.

Implementation Stage

Following the sign-off of the requirements, the implementation stage will begin. During implementation, we will:

1. Provide early sight of key customisations including list and form layouts to allow you to evaluate the system against your own business processes prior to delivery.
2. Implement functionality identified as having higher technical complexity early to ensure that the project risk is kept to a minimum.

Aside from the configuration of the system itself, a key part of the implementation phase is the creation of any data migration and/or integration routines. We ensure that these aspects of the project are tightly controlled by:

- Producing a detailed data mapping document that lists every data field to be migrated or integrated, where the data will be held in the new system and any transformations that the data will undergo during the process.
- Running at least one test migration into the new system to allow you to verify the accuracy of the data yourself.

Before we finally release the system to you for your own acceptance testing we will fully system test it ourselves ensuring that all agreed requirements have been met.

Deployment Stage

Once you have ensured that the system is delivered as per the requirements we will proceed to go-live. Typically, this will involve a cut-off date when use of any old systems being replaced will cease followed by a live data migration into the new system.

We will always be available on the day of go-live to be accessible to the main body of users. This allows us to provide instant help and problem solving. In our experience, this helps to ensure a good first impression of the system amongst the users and hence improves system adoption.

Post-Live User Adoption Stage

The post-deployment stage is one of the most important in the project. Until this point, the customer has been incurring cost. After this point, the anticipated ROI is delivered.

Immediately after a system has been deployed we will remain on hand to quickly resolve any issues. We will also conduct a project closure meeting where any future phase requirements and any lessons learnt during the project can be discussed and documented.

In the longer term, we offer technical and administrative support services, as well as advice on user adoption issues. Our account management practices will aid you in this process in the months and years after your new system goes live.

User Adoption

It is simply not possible to realise the expected return on investment if your users don't actually use the system as intended!

Until the post-deployment stage, the customer has been incurring cost. After this point, the anticipated ROI is delivered.

Our Implementation Approach
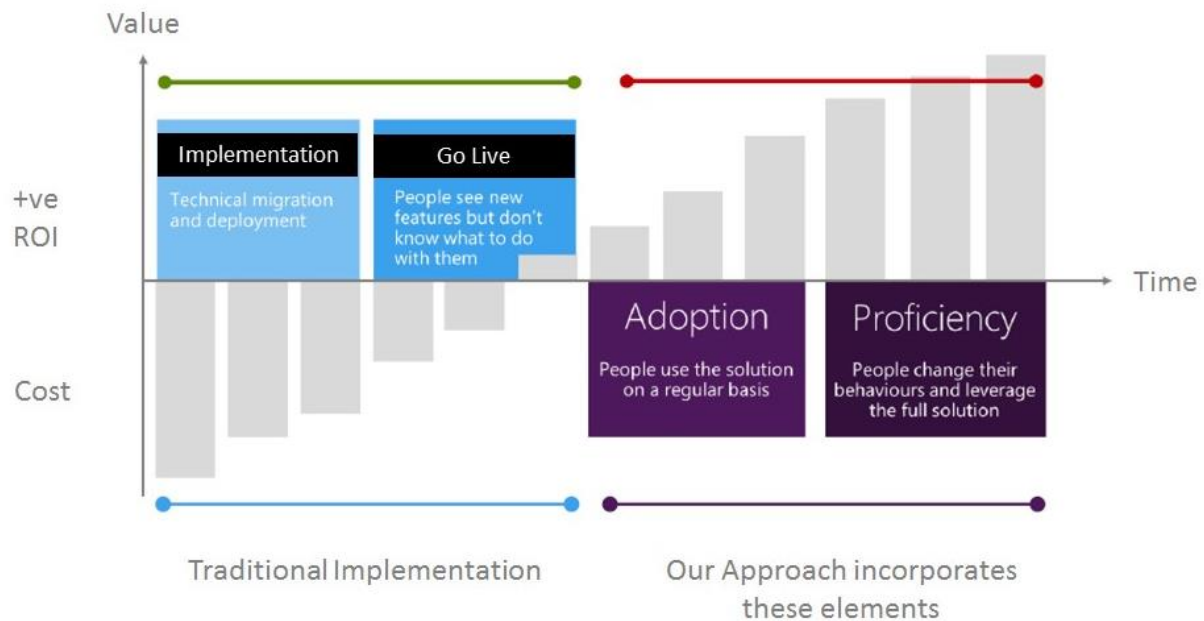
Ensuring high levels of user adoption is a complex task and involves activity before during and most importantly after the system implementation.

Before Implementation

To ensure not only the success of the implementation itself, but also that users are engaged in the project and it will end up being fit for purpose there are a number of activities we undertake before implementation has even begun:

- Ensure that all user groups get to have their say during requirements gathering.
- Ensure that the set of functional requirements is based on existing business processes.
- Directly play back our thoughts on how the system can work to all user groups.

During Implementation

It is important that users remain engaged and, ultimately, are ready and eager to use the system as soon as it launches. These are the activities we perform to make sure this is the case:

- Chair a project implementation board with representatives from all stakeholders.
- Ensure that all configuration and customisation is demonstrated to users early.
- Gather feedback from users during implementation and incorporate as much as possible into the final build.

- Deliver bespoke training to users.
- Ensure that an "Expected Usage" manual is created so that all staff know how the system should be used.
- Work with the internal communications team to ensure that the system is consistently promoted throughout the business and that all users are aware of progress
- Work with you to formulate some simple materials that will promote system usage (e.g. some principals of use).
- Ensure that we are on site with users on launch day.

After Implementation

One of the most critical times for user adoption is in the immediate months after the system is first put live. This is also the time that use of the the system is likely to lose momentum. To make sure that focus remains on user adoption and to address any issues we undertake the following:

- Deliver bespoke usage monitoring reports.
- Perform a deep assessment of the data entered/amended in the system to date.
- Work with your communications team to gather user feedback.
- Conduct system clinics and/or additional user training.
- Deliver key system changes quickly and efficiently.
- Ensure robust change management is in place.
- Perform regular account reviews.
- Establish product ownership within your business.

Support Capabilities

We provide support during business hours from 9am until 5pm and can extend these hours to suit particular requirements.

Cases are prioritised as follows:

Priority	Description	Examples
1 – Severity Class A	System down or unable to access data	Users cannot log into the system Users cannot use a specific function.
2 – Severity Class B	Time-critical business function out of action or malfunctioning	Cannot process a Service request
3 – Severity Class C (Default)	Non time-critical business Function out of action or malfunctioning	Cannot print management report
4 – Severity Class D	Other	Advice requested regarding configuration of a report Requests for modifications to the system

Priorities are actioned as follows:

Action	Priority 1	Priority 2	Priority 3	Priority 4
Response from knowledgeable support consultant who will commence work on diagnosing and solving the case within:	1 working hour	2 working hours	4 working hours	2 working days
Status Updates within:	2 working hours	4 working hours	10 working hours	5 working days
Escalate to Help Desk Manager within	2 working hours	4 working hours	1 working day	Not applicable
Endeavour To Resolve (Fix) within:	1 working day	2 working days	5 working days	Not applicable

We can provide a full range of support services shown in the table below:

Core Support	Core Service + Administration
• Unlimited access • SLAs • Remote access and diagnostics • Help with operational errors • Investigation into and fixing of functionality not working as expected. • Escalation to and liaising with vendor support desks as required • Change Control	• All of Core Service plus…… • Add/Remove users (incl. Outlook client setup) • Manage security rights • Add, remove, move, edit fields (incl. picklists) • Create/edit views • Creation of new advanced finds/charts • Add/edit dashboards • Add/edit mail merge and email templates • Measuring user adoption & Monthly Usage Review • Data maintenance including scheduled data deletions • Create/edit forms (over and above single field additions) • Create/Edit reports • Create/Edit workflows • Create/Edit scripts

Skills For The Information Age (SFIA) Definitions and Rate Card

	Strategy & architecture	Business change	Solution development & implementation	Service management	Procurement & management support	Client interface
1. Follow	£875	£875	£875	£875	£875	£875
2. Assist	£905	£905	£905	£905	£905	£905
3. Apply	£935	£935	£935	£935	£935	£935
4. Enable	£965	£965	£965	£965	£965	£965
5. Ensure/Advise	£995	£995	£995	£995	£995	£995
6. Initiate/Influence	£1,025	£1,025	£1,025	£1,025	£1,025	£1,025
7. Set Strategy/Inspire	£1,055	£1,055	£1,055	£1,055	£1,055	£1,055

Standards for Consultancy Day Rate cards

Consultant's Working Day – 7 hours exclusive of travel and lunch

Working Week – Monday to Friday excluding national holidays

Office Hours - 09:00 – 17:00 Monday to Friday

VAT – Pricing Excludes VAT

Travel and Subsistence –Payable at department's standard T&S rates outside M25

Mileage – As above

Professional Indemnity Insurance – included in day rate

Level Definitions

	Autonomy	Influence	Complexity	Business Skills
1 Follow	Works under close supervision. Uses little discretion. Is expected to seek guidance in expected situations.	Interacts with immediate colleagues.	Performs routine activities in a structured environment. Requires assistance in resolving unexpected problems.	Uses basic information systems and technology functions, applications, and processes. Demonstrates an organised approach to work. Learns new skills and applies newly acquired knowledge. Has basic oral and written communication skills. Contributes to identifying own development opportunities.
2 Assist	Works under routine supervision. Uses minor discretion in resolving problems or enquiries. Works without frequent reference to others.	Interacts with and may influence immediate colleagues. May have some external contact with customers and suppliers. May have more influence in own domain.	Performs a range of varied work activities in a variety of structured environments.	Understands and uses appropriate methods, tools and applications. Demonstrates a rational and organised approach to work. Is aware of health and safety issues. Identifies and negotiates own development opportunities. Has sufficient communication skills for effective dialogue with colleagues. Is able to work in a team. Is able to plan, schedule and monitor own work within short time horizons. Absorbs technical information when it is presented systematically and applies it effectively.
3 Apply	Works under general supervision. Uses discretion in identifying and resolving complex problems and assignments. Usually receives specific instructions and has work reviewed at frequent milestones. Determines when issues should be escalated to a higher level.	Interacts with and influences department/proj ect team members. May have working level contact with customers and suppliers. In predictable and structured areas may supervise others. Makes decisions which may impact on the work assigned to individuals or phases of projects.	Performs a broad range of work, sometimes complex and non-routine, in a variety of environments.	Understands and uses appropriate methods, tools and applications. Demonstrates an analytical and systematic approach to problem solving. Takes the initiative in identifying and negotiating appropriate development opportunities. Demonstrates effective communication skills. Contributes fully to the work of teams. Plans, schedules and monitors own work (and that of others where applicable) competently within limited deadlines and according to relevant legislation and procedures. Absorbs and applies technical information. Works to required standards. Understands and uses

			appropriate methods, tools and applications. Appreciates the wider field of information systems, and how own role relates to other roles and to the business of the employer or client.
4 Enable	Works under general direction within a clear framework of accountability. Exercises substantial personal responsibility and autonomy. Plans own work to meet given objectives and processes.	Influences team and specialist peers internally. Influences customers at account level and suppliers. Has some responsibility for the work of others and for the allocation of resources. Participates in external activities related to own specialism. Makes decisions which influence the success of projects and team objectives.	Performs a broad range of complex technical or professional work activities, in a variety of contexts.	Selects appropriately from applicable standards, methods, tools and applications. Demonstrates an analytical and systematic approach to problem solving. Communicates fluently orally and in writing, and can present complex technical information to both technical and nontechnical audiences. Facilitates collaboration between stakeholders who share common objectives. Plans, schedules and monitors work to meet time and quality targets and in accordance with relevant legislation and procedures. Rapidly absorbs new technical information and applies it effectively. Has a good appreciation of the wider field of information systems, their use in relevant employment areas and how they relate to the business activities of the employer or client. Maintains an awareness of developing technologies and their application and takes some responsibility for personal development.
5 Ensure/ Advise	Works under broad direction. Is fully accountable for own technical work and/or project/ supervisory responsibilities. Receives assignments in the form of objectives. Establishes own milestones and team objectives, and delegates responsibilities. Work is often self-initiated.	Influences organisation, customers, suppliers and peers within industry on the contribution of own specialism. Has significant responsibility for the work of others and for the allocation of resources. Makes decisions which impact on the success of assigned projects i.e. results,	Performs a challenging range and variety of complex technical or professional work activities. Undertakes work which requires the application of fundamental principles in a wide and often unpredictable range of contexts. Understands the relationship between own	Advises on the available standards, methods, tools and applications relevant to own specialism and can make correct choices from alternatives. Analyses, diagnoses, designs, plans, execute and evaluates work to time, cost and quality targets. Communicates effectively, formally and informally, with colleagues, subordinates and customers. Demonstrates leadership. Facilitates collaboration between

		deadlines and budget. Develops business relationships with customers.	specialism and wider customer/ organisational requirements.	stakeholders who have diverse objectives. Understands the relevance of own area of responsibility/ specialism to the employing organisation. Takes customer requirements into account when making proposals. Takes initiative to keep skills up to date. Mentors more junior colleagues. Maintains an awareness of developments in the industry. Analyses requirements and advises on scope and options for operational improvement. Demonstrates creativity and innovation in applying solutions for the benefit of the customer.
6 Initiate/ Influence	Has defined authority and responsibility for a significant area of work, including technical, financial and quality aspects. Establishes organisational objectives and delegates responsibilities. Is accountable for actions and decisions taken by self and subordinates	Influences policy formation on the contribution of own specialism to business objectives. Influences a significant part of own organisation and influences customers/suppliers and industry at senior management level. Makes decisions which impact the work of employing organisations, achievement of organisational objectives and financial performance. Develops highlevel relationships with customers, suppliers and industry leaders.	Performs highly complex work activities covering technical, financial and quality aspects. Contributes to the formulation of IT strategy. Creatively applies a wide range of technical and/or management principles.	Absorbs complex technical information and communicates effectively at all levels to both technical and nontechnical audiences. Assesses and evaluates risk. Understands the implications of new technologies. Demonstrates clear leadership and the ability to influence and persuade. Has a broad understanding of all aspects of IT and deep understanding of own specialism(s). Understands and communicates the role and impact of IT in the employing organisation and promotes compliance with relevant legislation. Takes the initiative to keep both own and subordinates' skills up to date and to maintain an awareness of developments in the IT industry.
7 Set Strategy/ Inspire	Has authority and responsibility for all aspects of a significant area of work, including policy formation and application. Is fully accountable for actions taken and decisions made,	Makes decisions critical to organisational success. Influences developments within the IT industry at the highest levels. Advances the knowledge and/or	Leads on the formulation and application of strategy. Applies the highest level of management and leadership skills. Has a deep understanding of the IT industry and	Has a full range of strategic management and leadership skills. Understands, explains and presents complex technical ideas to both technical and nontechnical audiences at all levels up to the highest in a persuasive and convincing

	both by self and subordinates	exploitation of IT within one or more organisations. Develops longterm strategic relationships with customers and industry leaders.	the implications of emerging technologies for the wider business environment.	manner. Has a broad and deep IT knowledge coupled with equivalent knowledge of the activities of those businesses and other organisations that use and exploit IT. Communicates the potential impact of emerging technologies on organisations and individuals and analyses the risks of using or not using such technologies. Assesses the impact of legislation, and actively promotes compliance. Takes the initiative to keep both own and subordinates' skills up to date and to maintain an awareness of developments in IT in own area(s) of expertise.

Sample Contract

DATE

PARTIES

1.   Arriga CRM Limited, a company incorporated in England and Wales (registration number 10004706) having its registered office at Highdown House, 11 Highdown Road, Leamington Spa, Warwickshire CV31 1XT "**Consultant**"); and

2.   *xxxxxxx*, (the "**Customer**") having its registered office at …………………

Services

The Consultant will perform the services required to deliver the system described in the requirements document entitled "xxxxxxxxxxxv1_1" and set out in the proposal entitled "Proposal for CRM Implementation Services V1.0".

The Consultant will invoice the Customer upon delivering each phase of the project.

 All prices quoted exclude VAT and expenses.

Software

  The software is xxxxxxxxx and the required licences are:
  * xxxxxxxxxxxxxx@ £xxxx per user per month

The initial licence period is 12 months and the term is renewable.

The price may vary after 12 months and the price is determined by xxxxxx.

The terms of use of the Software are determined by the Licence Agreement between the Customer and the software supplier.

The Consultant will invoice monthly in advance for the software. All prices quoted exclude VAT.

Support

The required level of support is the Core Support Service with Administration and Configuration services at a cost of £xxx per month, payable quarterly in advance.

Acceptance

The parties have indicated their acceptance of this Agreement by executing it below.

SIGNED BY …………. on ……………., the Consultant

SIGNED BY ………….. on ...., the Customer