

Customer Management Solution for the Cloud

Driving Secure Digital Transformation

May 2024

Customer Management Solution for the Cloud

Summary

Our Customer Management Solution for the Cloud offers the UK public sector a comprehensive SaaS platform for centralised customer data management and analytics. With seamless integration, automated workflows, and AI-powered analytics, it enhances customer experience, drives efficiency, and enables proactive engagement, ensuring organisations stay responsive and competitive.

Features

- Cloud-based platform for centralised customer data management and analytics.
- Seamless integration with existing systems for efficient data synchronisation.
- Customisable dashboards and reports for real-time insights and analysis.
- Automated workflows and notifications for enhanced customer engagement.
- Role-based access control ensures data security and compliance.
- Scalable infrastructure adapts to organisational growth and changing needs.
- Comprehensive customer profiles for personalised interactions and services.
- Multi-channel communication tools facilitate seamless customer interactions.
- AI-powered analytics for predictive customer behaviour analysis and recommendations.
- Continuous updates and enhancements for optimal performance and functionality.

Benefits

- Improved customer experience through centralised data and personalised interactions.
- Increased efficiency with seamless integration and automated workflows.
- Enhanced data security and compliance with role-based access controls.
- Scalable solution accommodates growth and changing customer needs.
- Real-time insights drive informed decision-making and strategic planning.
- Proactive customer engagement with automated notifications and workflows.
- Predictive analytics enable targeted marketing and service recommendations.
- Streamlined operations and reduced manual tasks boost productivity.
- Multi-channel communication tools enhance accessibility and responsiveness.
- Ongoing updates ensure the solution remains current and effective.

Service Description

The VCMS service is an enterprise solution based on the world's leading open-source application SuiteCRM. There are currently more than 4,000,000 users of the system. Our Service manages all the interactions with your customers providing a repository for all types of information.

The service also includes full workflow and process management functionality enabling you to build business logic that evaluates records as they are created, updated, and determines if an automated action needs to occur. As your relationship with your customers grows, and the amount of data that must be monitored increases, workflow becomes your perfect ally to maximise the efficiency of your business processes.

The real time dashboard reporting gives you visibility of key insights and customer status. The advanced reporting module allows you to create your own custom reports, which can be loaded into your own dashboards.

VCMS enables you to deliver the best service to your customers with less effort. Use the Cases module for efficient and organised communication with your clients and incorporate template responses to save time.

All the customer communication can be saved in the service, providing you with a complete overview of customer interactions and the ability to detect where you can improve. You can use the Cases module to efficiently manage interactions with customers when they ask for help or advice, providing support faster and easier, and keeping your customers happy.

The self-service portal allows you to manage all your customer issues through an easy to setup and use website. Your service teams will be instantly notified of customers issues and your customers will automatically be informed as soon as their issues have been dealt with. You can create template responses for Cases with the Knowledge Base Module and save time on responding to customers. You can also turn customer feedback into trackable "bugs", helping you to efficiently improve your products and/or services.

With VCMS you are in full control over your own service. It is easily customised to fit the needs of your organisation. You can create custom module fields, layouts, and relationships, and use the extremely powerful Security Suite Group Management feature to control what your users can access, locking down sensitive data to specific groups or teams. The Rest API allows you to seamlessly integrate the CRM with other applications in your organisation.

VCMS is fully featured, robust, scalable, and open source, making it the perfect Customer Management solution, with no limits on the number of users, no hidden or costly additional features, and there is no vendor lock-in.

VCMS includes the following modules and functionality:

- Customers.
- Contacts.
- Calendar.
- Cases.
- Document.
- Email integration.
- Campaign Management.
- Inbound and outgoing call management.
- Task identification, monitoring, and management.

VCMS integrates with other VCL services to provide a range of additional functionality including mapping, Kanban boarding, and a host of other features.

These services are suitable for Private, Community or Public Cloud hosting, on the Internet, and in Tier 1 or higher environments.

Tag Cloud

Customer Management, Cloud Solutions, UK Government, Public Sector, CRM, Customer Service, Citizen Engagement, Data Security, Compliance, Efficiency, Digital Transformation, Service Delivery, User Experience, Accessibility, Government Services, UK Public Sector.

Appendix 2 : Terms and Conditions

1. In all products Support is calculated on the basis of a remote, off-site basis, and where necessary, a secure access service to the services is required at additional cost. For UKCloud Tier 1 Elevated services, the Secure Remote Access solution provides such a service.
2. Change Requests, Change Boards, and Change Management are not included and will be calculated at normal SFIA rates. As a service, patching and updates will be managed and coordinated by Viewdeck and, unless there is an impact to service, no notification will be provided. Regular, pre- approved change windows for minor outages will be agreed with the Client upfront.
3. Rates do not include ITHC activity. Most components have been checked previously, and where possible relevant information will be made available. Where possible, and as required, supporting an ITHC and the outcomes of the ITHC will be managed as a fixed price item (the cost will depend on the Client's accreditation requirements).
4. Regular Service Reviews are not included, but can be added as a fixed cost package. The cost will depend upon the level of integration required into the client's service architecture and federated service model. Standard 'out of the box' reporting from service management tools will be provided for 2nd and 1st line support packages only. 3rd line support functions are not included (assumed to be part of a 2nd line support function). Where tailored or alternative reporting is required, these will be provided as an additional item
5. In accordance with our Security Policy, Patches will be applied when appropriate, and unless of High Priority (CESG or other body), at the discretion of Viewdeck. We aim to patch all systems within 30 days for Repository or packaged applications. Third party application software will only be upgraded if major failures or issues exist, impacting usability, or on annual renewals. Upgrades can be done at the client's request as a chargeable item.
6. 1st Line support assumes clients can self-serve via the Support Portal, and will always be directed towards email/online support functions.
7. 2nd Line support assumes interfacing and triage is handled by a separate (Client) Service desk, with Viewdeck acting as a Resolver Group. Email and Online Service portal will help manage and coordinate.

8. 3rd Line support assumes all end user management, and investigation is provided by the Client's ICT support function/organisation, and liaison is restricted to technical, authorised and available resources.
9. Additional Support tasks that are passed through to Viewdeck inappropriately will be charged at the normal SFIA Rates.
10. Viewdeck takes no responsibility for the functionality or the performance of these applications, open source solutions or their components. Where possible, software functionality will be baselined and agreed at commissioning. Downstream operational issues will be fixed, and best endeavours used to maintain service, but responsibility for third party software does not lie with Viewdeck. Liability is limited to the Value of the Termination of the Contract.

Appendix 3: Viewdeck Support

The Viewdeck Support and Service Desk function provides a range of options to meet a clients specific requirements, based upon service and business need. Support channels include telephone, web, Slack (Chat) and email to users of the service. The service provides an ITIL aligned help desk, with standard reporting, incident management and problem management processes using an application tool-set, with SLA management and customer reporting.

Viewdeck support helpdesk is available, during UK working hours, to log support calls for any incidents. Standard support hours can be extended by agreement. Each customer call is logged in our remote management system which provides a unique call reference number enabling issue tracking and enabling ease of exchange of information during incident resolution process.

Our fully trained team work directly with our clients to manage and resolve support queries using telephone, chat, remote access and, if necessary, on-site visits.

Our Standard Support function provides monthly service level reports, remote problem management support and monthly client reporting to provide integration into the client's service architecture and federated service models.

Our Service Desk can offer 1st, 2nd and 3rd line support depending upon client needs.

Support Level	Hours	Description
Bronze	9am -5pm Weekdays (UK Working Days, Excludes Bank Holidays)	Support aligned to UK working day. Telephone and email support as standard. Monthly reporting is provided.
Silver	9am – 5pm, 7 days a week (Excludes Bank Holidays)	Support aligned to UK working day including weekends. Telephone and email support as standard. Monthly reporting is provided with quarterly service reviews.
Gold	24 hours, 7 days per week	Support function and Service Desk are aligned to global working. Chat also included via Slack as standard. Monthly reporting is provided with quarterly service reviews, plus a named service manager.

The Viewdeck Service Desk can provide the following support options to suit the customers and business needs:

Support Option	Description
Managed Support Option 1st, 2nd and 3rd line support	<p>Customer end/business users directly interface to Viewdeck 1st line Service Desk provided.</p> <p>Viewdeck also provide:</p> <ul style="list-style-type: none"> • 2nd line service support providing configuration level remediation <p>3rd line technical change and technical support to clients technical resolver groups</p>
Configuration & Technical Support Option 2nd and 3rd line support	<p>Customer Business users are managed by their own Support Desk function. Configuration and Technical issues are escalated to the Viewdeck Service Desk by the Client Service Desk.</p> <p>Viewdeck only provides:</p> <ul style="list-style-type: none"> • 2nd line service support providing configuration level remediation <p>3rd line technical change and technical support to clients technical resolver groups</p>
Technical Support Option 3rd line support only	<p>Customer Business users are managed by their own Support Desk function. Configuration level issues are resolved by client resolver teams. Technical issues are escalated to the Viewdeck Service Desk by the Client Service Desk.</p> <p>Viewdeck only provides 3rd line technical change and technical support to clients technical resolver groups</p>

Incident Management

Viewdeck classifies incidents raised at its service desk using the following P1 – P5 Priority Code. Incidents raised with the Service Desk will be triaged and responded to within 30 Minutes and then actioned accordingly in priority order.

- P1 Total loss of service to all users.

- P2 Some loss of critical service for some or all users.
- P3 Limited loss of service or work around possible limiting loss experienced.
- P4 Tasks are made more difficult but are not impossible to complete.
- P5 Interferes with non-operational use.

Urgency of Response			
Priority code	Urgency of response	Target response (within core hours)	Target resolution (within core hours) (M-F x 9-5)
P1	Immediate, sustained effort using all necessary and available resources until service is restored.	Immediate response, action within 30 Mins (Enterprise 24x7) , 1 hour (Outside Support Hours).	4 hours
P2	Immediate response to assess the situation, staff may be interrupted and taken away from low or medium priority jobs.	Immediate response (within contracted Service Hours), action within 2 hours.	1 working day
P3	Response using standard procedures and operating within the normal frameworks.	Email notification of call being logged (within contracted Service Hours) 1 hour. Response by email or phone within 1 working day.	2 working days
P4	Response using standard procedures and operating within the normal frameworks as time allows.	Email notification of call being logged (within contracted Service Hours) 1 hour. Response by email or phone within 1 working day.	5 working days
P5	Response using standard procedures and operating within the normal frameworks as time allows	Email notification of call being logged (within contracted Service Hours) 1 hour. Response by email or phone within 1 working day.	10 working days

Our Service Level Objective aims to resolve 90% of incidents within the target resolution time.

All P1 and P2 events are allocated an Incident Manager to oversee and manage incidents through to resolution. Client help desks or Resolver Groups will be informed and updated as the incident resolution evolves. The Incident Manager will act as a SPOC for the client, providing regular reporting and will coordinate activity between various resolver groups as necessary to ensure successful resolution.

Appendix 4 : About us

Why is Viewdeck Different?

- **Value** - As a specialist SME, we can bring big company/ex Big 4 consultancy experience with niche specialist value.
- **Insight** - Having delivered across the Public Sector, Client Side and Supplier Side, our senior team bring more than just delivery capability, they bring insight and a network of relationships.
- **Experience** - Wide range of technical delivery support to MOD, SLC, SIA, Cabinet Office, NCA, Home Office, DVLA, Department of Education, FCA.
- **Win** - Our team have delivered £100m's of savings to HMG in the past few years by re-negotiating ICT contracts.
- **Diligence** - Our team worked regularly in secure government agencies. Our people, processes and capabilities support secure quality and assurable deliveries. ISO 27001 certified.
- **Energy** - Uplift your programme with new skills, new experiences, and new insight.
- **Collaboration** - Proven client support, skills transfer. Delivery through client/Viewdeck joint collaborative working.
- **Knowledge** - Specialist in Architecture, Cloud Solutions, HMG Transformation, and Leaders in HMG ICT programmes.

Offering Value for Money

Approach

- Expert skills and resources, Real world experience.
- Strong domain knowledge.
- Buddy/duplication of services/capabilities.
- Utilise existing staff, skills transfer, embed, upskill.
- Iterative/Agile, rapid reaction to changes.
- Re-use where applicable.
- Strong Comms, lasting legacy, easy to adopt, real artifacts.
- New Ways of working.

Outcome

- Efficient coherent delivery, with less time reworking or 'learning on the job'.
- Swift subject understanding, minimise learning and false assumptions.
- Risk reduction of delays through single points of knowledge and absence.
- Minimise Consultant spend, ensuring timely efficient handovers to client.
- Speedy product creation, less time pursuing wrong directions.
- Less time re-inventing capabilities, best value for money in delivery.
- Investments reused create more downstream value for the client.
- Enthused and interested workforce, more able to rapidly accommodate change and hence increased efficiency.



