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G-Cloud 15 Service Definition Document

CRM Strategy, Design & Implementation



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OMNICOM'S TRANSFORMATION CONSULTANCY

We power growth across marketing and technology... and where they meet

- Marketing & advertisement enablement
- Technology & data excellence

3,000+

Employees globally

22

Locations

35+

Years of experience

9.1/10

Client satisfaction





How transformation happens

Marketing & advertising enablement

- Marketing analytics
- Commerce
- Content automation
- Content supply chain
- MarTech
- AdTech
- Personalisation
- Marketing operations

Technology & data excellence

- Enterprise data
- Digital products
- Scaled delivery
- AI value creation
- Agentic workflows
- Tech modernisation
- Service model innovation



Technology & Data Excellence

Credera's capabilities span the disciplines of management consulting, user experience, data, AI and technology solutions

ENTERPRISE DATA STRATEGY & IMPLEMENTATION

Build a strategic data foundation that transforms information into competitive advantage and business growth.

DIGITAL PRODUCT STRATEGY & ENGINEERING

Accelerate digital innovation through modern methodologies, cloud-native architectures, and continuous delivery practices.

SCALED DELIVERY EXCELLENCE

Ensure successful implementations through comprehensive quality assurance, risk management, and delivery optimisation practices.

AI STRATEGY & VALUE REALISATION

Maximise your AI investments. Our strategies help you identify, implement, and scale AI initiatives for significant ROI across your enterprise.

AGENTIC WORKFLOW DESIGN

Leverage AI-powered autonomous systems that reduce operational costs, accelerate process cycle times, and eliminate manual bottlenecks.

TECHNOLOGY MODERNISATION

Transform legacy systems into modern, cloud-native platforms to drive business growth and innovation.

SERVICE MODEL INNOVATION

Transform traditional service delivery through digital-first customer experiences, operational redesign, and technology integration.



Shaping the future of data, technology, and marketing

Adobe

aws

salesforce

Microsoft

Google Cloud

PEGA

Acquia

data
iku

TEALIUM

databricks

SITECORE

braze

Fivetran

mparticle

MAGELL
ALLIANCE

BIGCOMMERCE

snapLogic

elasticpath

Optimizely

screendragon

TREASURE
DATA

commercetools

snowflake



PUBLIC SECTOR

Trusted by
the world's
leading brands



Department
for Work &
Pensions



HM Revenue
& Customs



Medicines &
Healthcare products
Regulatory Agency



Ministry
of Defence



HUMBERSIDE
POLICE



CANCER
RESEARCH
UK



ACRO
Criminal Records Office



Met Office



Government of
JERSEY

GAMBLING
COMMISSION



England

NSPCC



How Credera is different

Connected growth, powered by Omnicom

Marketing ambition and technical execution rarely align on their own, yet growth demands both. As Omnicom's transformation consultancy, we close that gap, turning data and ideas into competitive advantage so your brand can further connect, convert, and endure.

Tech and marketing, working as one

Broken customer experiences don't happen by accident; they begin backstage with disconnected people, processes, and tech. By aligning these from the start, we seal the cracks early, driving operational excellence so every interaction feels effortless and on-brand.

From proof of concept, to proof of value

Digital transformations collapse chasing quick wins or artificial intelligence (AI) pilots that never scale to impact. We help leaders deliver enterprise-ready AI and systems: trusted, governed, and human-centered. Our iterative approach accelerates outcomes while reducing risk and building trust.

Lasting change, built together

Too many transformations implode under complexity, fractured leadership, cost overruns, or ignored front-line input. At Credera, we don't hand over transformation; we co-create it. Together, we move strategy into action and deliver outcomes that land early and last.



Our Suite of Services

DATA & AI

- AI Industrialisation & Enterprise Deployment
- AI Maturity and Readiness Assessment
- AI-Enhanced Software Engineering
- Artificial Intelligence (AI) Acceleration & Prototyping
- Data Product Engineering & Delivery
- AWS Data Platform Engineering
- Azure Data Platform Engineering
- Cloud Data Transformation
- Data Platform Governance, Privacy & Ethics
- Data Analytics Transformation
- Data & Analytics Maturity Assessment
- Data Engineering & Pipeline Delivery
- Data Management Capability Assessment
- Data Mesh Architecture & Transformation
- Data Migration & Legacy Decommissioning
- Cloud Data Platform Design & Implementation
- Enterprise Data & Analytics Strategy
- Data Visualisation & BI Dashboards
- Data Warehouse & Lakehouse Modernisation
- GCP Data Platform Engineering
- Machine Learning Model (MLOPs) Development & Deployment
- Real-Time & Streaming Analytics Platform Development

DATA & AI

- Automated Pipeline Delivery & Operations (DataOps)
- Advanced Analytics Delivery & Insights
- Microsoft Fabric Data & Analytics Services
- AWS Data Zone & Lake Formation Services
- Enterprise Data Capability Review
- Customer & Marketing Data Strategy
- Artificial Intelligence Platform Development & Operations
- Agentic Workplace/Process Automation (AI & RPA)
- Artificial Intelligence (AI) Data Readiness & Governance
- Data & Analytics Operating Model Design
- AI Strategy & Advisory Services

SOFTWARE ENGINEERING

- Cloud Application Modernisation
- Cloud/ Platform Engineering & Secure Delivery
- IT Estate Assessment & Cloud Readiness Review
- Integration Architecture & API Platforms
- Solution Architecture Services
- Architecture Operating Model Design
- Architecture Governance & Assurance
- Low-Code Cloud Delivery
- Full-Stack Digital Product Engineering
- Site Reliability Engineering (SRE) Enablement
- Cloud-Native Software Engineering
- DevOps/DevSecOps Transformation & Enablement

CLOUD

- Cloud Architecture & Solution Design
- Cloud Well-Architected Review/Health Check (AWS, Azure, GCP)
- Digital & Cloud Operations Enablement
- Cloud-Native Architecture & Modernisation
- Network Architecture & Cloud Migration Support
- Cloud Operating Model & Org Design
- Cloud & Data Centre Migration Services
- AWS Cloud Consulting & Modernisation
- Azure Cloud Consulting & Modernisation
- Google Cloud Consulting & Modernisation
- Cloud Service Management & Operations Transformation
- Cloud Strategy, Business Case & Roadmap
- Cloud Design Authority & Assurance Services
- Cloud FinOps & Cost Optimisation
- Cloud Governance, Risk & Compliance (GRC)
- Multi-Cloud Architecture & Implementation
- Private & Hybrid Cloud Implementation



Our Suite of Services

ADOBE

- Adobe Experience Cloud Platform Solution
- Adobe Experience Manager - Websites Implementation
- Adobe Experience Manager - Health Check / Audits
- CMS Bridge - Adobe Experience Manager Content Migration tool
- Content Supply Chain
- Adobe Analytics to Customer Journey Analytics Migration
- Google Analytics Universal to Customer Journey Analytics Migration
- Implementing Real-time CDP
- Implementing Adobe Journey Orchestration
- Adobe Target Run-and-Operate Personalisation
- Adobe WebSDK First Party Data Preservation

PEGA

- Pega Cloud Support & Managed Services
- Pega Intelligent Automation Implementation
- Pega Digital Experience Design
- Pega CRM Implementation & Optimisation
- Pega Customer Decisioning & Engagement
- Pega Modernisation, Migration & Platform Upgrade
- Legacy Application Transformation using AI

PROGRAMME DELIVERY

- User Research & Total Experience Strategy
- Agile Delivery & Programme Leadership
- Agile Transformation & Ways of Working
- Cloud Business Case & HMT Green Book Support
- User Experience (UX) Design & Prototyping
- Service Design & Journey Mapping
- Digital & Technology Business Strategy
- Change Management & Communications
- Innovation Operating Model & Governance
- Cloud Programme & Project Management
- Cloud Service & Vendor Transition Management
- Delivery Assurance & Programme Health Checks
- PMO as a Service (Portfolio & Programme)
- Portfolio & Programme Management
- Cloud, Digital and Data Delivery Partner Services
- Technology Sourcing & Managed Procurement Services
- SaaS Application Migration
- Testing & Quality Assurance (QA)
- Business Analysis Services
- Operating Model Design & Transformation
- Scaling Innovation Pipelines & Portfolios
- Innovation Capability & Maturity Assessment
- Digital Service Delivery: Discovery, Alpha and Beta

MARTECH

- CRM Strategy, Design & Implementation
- Marketing Cloud Maturity Assessment
- Marketing Cloud Implementation
- Marketing Cloud Optimisation
- Marketing Cloud Strategy & Roadmap
- Customer 360 / Single Customer View Build
- Content Management System Implementation
- Enterprise Content Management Solutions
- Customer Data Platform Implementation
- SEO, GEO & Organic Performance Optimisation
- MarTech Operating Model & Governance

SALESFORCE

- Salesforce Marketing & CRM Implementation Services
- Salesforce Marketing & CRM Managed Support Services
- Salesforce Health Checks & Optimisation Assessments
- Salesforce Data Services
- Salesforce AgentForce and AI



CRM Strategy, Design & Implementation

Credera helps define and implement your CRM strategy via our marketing, technology, AI, and data transformation expertise. Our analysis will identify the current user experience, technical and operating model gaps, preventing the delivery of desired customer/citizen experiences, and produce a plan for how to close those gaps for maximum value.

Features

1. CRM capability, data and operating model assessment
2. Technical and operational gap analysis
3. CRM journey mapping and prioritised transformation roadmap
4. CRM and CDP platform evaluation and selection
5. Authoritative, data-led case for change
6. First-party data and AI maturity workshops
7. Enterprise CRM design and implementation
8. Consent management and compliant data strategy
9. First-party data activation and optimisation
10. Certified CRM/CDP experts: Adobe, Salesforce, Dynamics, HubSpot, Tealium, Treasure Data

Benefits

1. Sequenced roadmap of initiatives unlocking capabilities and business value
2. Prioritised CRM strategy optimising cost, effort, and ROI
3. Best-practice programme management reducing risk through predictable delivery
4. Agile organisational design driving faster change adoption
5. Improved user experience across advertising, content, service and agentic channels
6. Connected data for smarter, faster AI ready decision-making
7. Enhanced media and marketing efficiency and effectiveness
8. Higher CRM adoption and sustained user productivity
9. Continuous optimisation for long-term CRM performance



CRM Strategy, Design & Implementation

Service Definition

OUR PERSPECTIVE

- We believe that the core of any successful CRM strategy lies in deep understanding of customer behaviours, preferences and needs.
- We often see clients rush into implementation without thoroughly defining the business requirements or understanding how the CRM should align with broader business strategies.
- We also see organisations fail to account for the change management required to ensure successful adoption and the creation of overly customised systems that are difficult to maintain, upgrade or integrate with other systems.

PURPOSE & OBJECTIVES

- To design and implement a CRM system that enhances the interaction between a business and its customers.
- Integrate the CRM system with existing business processes to streamline operations, improve data flow and enhance communication.
- Utilise CRM data to gain insights into customer behaviour and preferences, supporting more informed business decisions.

OUR APPROACH

- We conduct comprehensive assessments of existing customer interaction systems and business processes, enabling us to develop a tailored CRM strategy that aligns with business objectives and addresses specific pain points.
- We work collaboratively with teams across different departments to ensure seamless integration into existing workflows, helping to foster buy-in and allow value to be gained from the system as early as possible.

OUR CAPABILITIES

- We possess extensive experience across various CRM/CDP platforms, such as Salesforce, Adobe Dynamics, Tealium, Treasure Data and HubSpot.
- We excel in integrating CRM systems with existing data structures and providing advanced analytics capabilities, ensuring actionable insights are gained from customer data, driving improved decision making and personalised customer interactions.
- Our approach puts a focus on change management and user adoption, including training programmes and ongoing support to drive user adoption rates. This is critical for ensuring ROI.

OUR EXPERIENCE

- Credera was engaged by a leading pharmaceuticals company to assess its readiness to develop internal consumer marketing capabilities.
- For a leading financial services firm Credera was engaged to provide improved stability, as advertising campaigns were executed by a variety of partners and platforms and lacked consistency.



Credera Operational Framework

Our operating framework is designed to uphold the highest standard of excellence across all aspects of our engagements. We ensure superior quality assurance through performance evaluations and integrated client feedback. Our account management processes are built on a deep understanding of our clients' needs, ensuring a personalised service and sustained engagement. Our delivery methodologies are rooted in efficiency and adaptability, utilising our deep experience and best practices to achieve timely and successful outcomes.

We adhere to strict standards and policies to maintain integrity and reliability, whilst our commitment to ecosystem collaboration enhances our ability to leverage diverse insights and expertise across industries.

Central to our approach are our core values: ***Humility, Tenacity, Excellence, Integrity and People First***, which guide our every decision, underscoring our dedication to ethical business practices and client service.





Additional Service Information

PRICING

This service is priced in accordance with the rate card provided and can be modelled using a range of commercial approaches, e.g. time & materials, fixed price, risk/reward and velocity-based, etc. Please refer to our pricing document for more information.

ORDERING/ INVOICING

Unless otherwise agreed in the proposal, all fees associated with the engagement will be invoiced monthly in arrears. Invoices shall be paid by the client within thirty (30) days of the date of the invoice.

ONBOARDING/ OFFBARDING

Credera's cloud support services can be ordered by contacting our team via the information given in the 'Contact Us' section of this document. Clients can terminate their engagement with us with 30 days' notice.

CONSUMER RESPONSIBILITIES

Consumer responsibilities are closely aligned with the specific requirements of the engagement. As such, these responsibilities must be discussed and agreed upon with the customer before the engagement begins and outlined in the call-off contract/ order form.

TECHNICAL REQUIREMENTS

The technical requirements and dependencies for the services offered under G-Cloud 15 are tailored to each call-off. It is essential to discuss and agree on these details with the customer before the engagement commences.

SERVICE CONSTRAINTS

There are no constraints to this service. We work collaboratively with our clients to identify their needs.

TRAINING

Credera strives to facilitate a seamless transfer of knowledge and skills from our consultants to our clients' teams, ensuring an effective and beneficial learning experience.



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The power and weight of a strong consultancy with a perfect blend of team effort culture, embedded into the client organisation to drive successful outcomes.

Dan Parry
Assistant Director





Contact Us

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