

ServiceNow – Customer Relationship Management (CRM)

Service Definition Document

Sopra Steria



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1 About Sopra Steria

1.1 Overview

About Sopra Steria

Sopra Steria, a major Tech player in Europe with 50,000 employees in nearly 30 countries, is recognised for its consulting, digital services and solutions. It helps its clients drive their digital transformation and obtain tangible and sustainable benefits. The Group provides end-to-end solutions to make large companies and organisations more competitive by combining in-depth knowledge of a wide range of business sectors and innovative technologies with a collaborative approach. Sopra Steria places people at the heart of everything it does and is committed to putting digital to work for its clients in order to build a positive future for all. In 2024, the Group generated revenues of €5.8 billion.

The world is how we shape it

Sopra Steria (SOP) is listed on Euronext Paris (Compartment A) – ISIN: FR0000050809 For more information, visit us at www.soprasteria.com

50,000

employees

€5.8bn

2024 revenue

Top 5

European digital
services companies

In nearly

30

countries



1.2 Our Cloud Capability

Sopra Steria Cloud Practice brings together leading digital, cloud and engineering expertise to accelerate transformation for our clients.

- Delivering comprehensive digital and cloud transformation, including strategic consulting, change management, large-scale migration, application modernisation, next-generation development and secure, optimised operations
- Integrating deep capability across applications, data, infrastructure, cloud platforms and security, supported by industrialised assets to enable solutions across Private, Public, Hybrid and Sovereign Cloud environments
- Using an end-to-end cloud delivery model that integrates business, engineering, security and operations, ensuring continuous innovation, strong governance, and measurable business value throughout the full cloud lifecycle.

1.3 Our Credentials

Capacity

More than 15,000 cloud experts in 30 countries
(Vision, Ops, Design, Scale)

Market recognitions

- Large account (best category>\$250m) in the "Public Sector Industry Cloud Landscape" (Forrester)
- Leader "Cloud public in Europe" & "Next Gen Private & Hybrid Cloud" (ISG)
- Leader "Cloud Infra Brokerage" (NelsonHall)
- Best in Class "Azure" & "SAP" & "Service Now" (PAC Radar)
- Leader "Cloud Native Application" & "Application Transformation Services" (Quadrant)
- Major Contender "Cloud Services" & "Cloud Native Applications" & "Services on AWS Azure & CGP" (Everest)

Key partners



Main market recognitions

2nd in IT Services in France and 10th in EMEA*

Cybersecurity	Digital	AI	IT for Green	Cloud			
• Leader "Cyber resiliency services" (NelsonHall) • Leader "cybersecurity" in France & Germany (ISG) • Top 5 "cybersecurity" in France (Markess)	• Leader "Application Transformation Services" (Quadrant) • Leader "Digital Banking" (NelsonHall) • Leader "Digital Banking Services" (ISG) • Major Contender "Digital twin Services" (Everest) • Innovator "Digital Manufacturing" (NelsonHall)	• Leader AI Services & Gen AI (PAC Innovation Radar) • Leader AI Services (Quadrant) • Leader "Intelligence Process Automation" (Quadrant) • Major player "European Professional Services for Data-Drive" (IDC) • Major contenders "AI services" & "Intelligent Process Automation services" (Everest)	• Leader "ESG for Banking Services" (NelsonHall) • Best in class "consulting and digital services for sustainable development" (PAC Innovation Radar) • Major Contender "NetZero Consulting Services" (Everest)	• Large account (best category>\$250m) in the "Public Sector Industry Cloud Landscape" (Forrester) • Leader "Cloud Infra Brokerage" (NelsonHall) • Best in Class "Azure" & "SAP" & "Service Now" (PAC Radar) • Leader "Cloud Native Application" & "Application Transformation Services" (Quadrant) • Leader "Cloud public in Europe" & "Next Gen Private & Hybrid Cloud" (ISG) • Major Contender "Cloud Services" & "Cloud Native Applications" & "Services on AWS Azure & CGP" (Everest)			
							

* Source PAC 2024

2 Service Overview

2.1 Service Description

Sopra Steria Group, a major player in the European tech sector in nearly 30 countries, is recognised for its consulting, digital services and software development. It helps its clients drive their digital transformation and obtain tangible and sustainable benefits. The Group provides end-to-end solutions to make large companies and organisations more competitive by combining in-depth knowledge of a wide range of business sectors and innovative technologies with a fully collaborative approach. Sopra Steria places people at the heart of everything it does and is committed to putting digital to work for its clients in order to build a positive future for all. The world is how we shape it.

We are a ServiceNow Elite Partner who provides licences, consultancy, design, implementation and support for all ServiceNow Applications across the entire platform which is supplemented by extensive experience implementing on-premises solutions for secure customers.

Customer Relationship Management (CRM) enhances customer engagement, sales and order management and field service delivery using ServiceNow. The service covers Customer Service Management (CSM), Sales and Order Management (SOM), and Field Service Management (FSM). CRM supports end-to-end processes across customer interactions, the lead-to-cash lifecycle and field service operations. Our team is able to leverage the citizen Service Portal and Now Assist to support self-service capabilities, intelligent guidance, automated workflows and operational visibility. We help organisations improve efficiency, resolution speed and customer satisfaction.

ServiceNow Module	Acronym
Customer Service Management	CSM
Sales and Order Management	SOM
Field Service Management	FSM

We cover the following industries:

- Education
- Government
- Aerospace, Defence and Security
- Retail and Hospitality
- Telecom Media Technology
- Energy and Utilities
- Healthcare and Life Sciences
- Service Provider
- Transportation and Logistics
- Financial Services
- Manufacturing

When you start working with Sopra Steria we ensure low-risk, successful delivery within time and budget by implementing robust governance processes. This involves establishing governance at technical, operational, and tactical levels, assigning appropriate roles and responsibilities to ensure effective management throughout the ServiceNow implementation process.

Our UK-based ServiceNow Practice will support, maintain and grow your enterprise capabilities, thus allowing you to be self-sufficient and drive ongoing value through the platform and subsequently accelerating your businesses time to value.

We strongly encourage utilising the platform's **"Out of the Box"** features, enabling you to harness future roadmap

capabilities and supportability, without the risks associated with platform customisation.

OCM (Organisational Change Management) is the fulcrum of a successful delivery when collaborating with Sopra Steria, winning the hearts and minds of users across the platform by providing timely, clear, and effective knowledge transfer and training. Ensuring users understand and can effectively use and support the platform is essential for driving adoption and meeting your business case needs and requirements.

Sopra Steria also provide a Managed Service offering as and when required by customers, covering the following:

- 1st, 2nd and 3rd Line Support
- Platform Management
- System Administration
- Development and application Enhancements

The ServiceNow Practice at Sopra Steria will be focussing on Service Improvement and the operational responsibility of your ServiceNow Platform enabling your business to focus on furthering innovation and fuelling your digital, business and operational transformation.

2.2 Features

- Manage customer engagement across sales, orders and field services
- Automate routine tasks and provide AI-assisted guidance to agents
- Track leads, opportunities and engagements efficiently
- Manage quotes, orders and fulfilment across the product lifecycle
- Optimise work order creation, assignment and field service execution
- Schedule and dispatch field engineers dynamically to maximise efficiency
- Omnichannel support across web, phone, chat, email, social media
- Consolidate customer records and insights to support decision-making
- Utilise end-to-end digital playbooks for call centre agents
- Citizen-facing Service Portal with modular interface for self-service and workflows

2.3 Benefits

- Improve customer satisfaction through faster issue resolution and responses
- Increase agent productivity with consolidated workflows and actionable insights
- Streamline sales processes from lead to order fulfilment efficiently
- Enhance field service efficiency with optimal scheduling and dispatch
- Reduce operational risk with automation and AI-guided decision-making
- Enable self-service, deflecting routine queries and reducing workload
- Provide real-time visibility across teams, processes and customers
- Support revenue growth with faster quote capture and fulfilment
- Optimise engineers and resource utilisation across multiple teams
- Inform management decisions with analytics, reporting and performance metrics

2.4 Our Approach

Sopra Steria is proud to be members of the Management Consulting Association (MCA). An essential requirement of

MCA membership is the ability to demonstrate our commitment to the Principles of the MCA's Consulting Excellence, a ground-breaking scheme that celebrates consulting's value and commits MCA members to the highest standards of Ethical Behaviour, Client Service and Value, and Professional Development.

Sopra Steria's ServiceNow customers expect their platform investments to yield success and align with their business objectives.

To accomplish this, we commit to meeting our customers' internal demands and requirements while adhering to agreed-upon timelines and budgets, all while minimising risk to the project. To tackle these challenges effectively, we will leverage an adaptive framework that fosters repeatability and embraces the mantra: **"One Platform, One Architecture, One Data Model"**.

Sopra Steria uses Now Create, a delivery approach widely acknowledged as industry best practice. By utilising this framework approach with core components, we deliver outstanding services to customers that are standardised, repeatable and scalable to meet the global demand of the largest and complex of clients.

Using Now Create ensures consistent deployment success for every Sopra Steria ServiceNow customer.

Now Create stems from thousands of successful ServiceNow implementations worldwide. It encompasses several core components, granting access to structured processes and best-practice assets that enhance quality and predictability, leading to quicker time-to-value. By eliminating uncertainty, it empowers you to realise the exceptional business outcomes you envision.

The Now Create core hybrid waterfall methodology includes sequential project phases and exit gates as the foundation for ServiceNow projects.

There are six project phases applied across all ServiceNow projects:

- **Get Started:** Define project vision, scope and objectives; identify key stakeholders and establish governance; confirm resources, roles, and responsibilities; begin Organisational Change Management (OCM) and testing strategy planning
- **Initiate:** Understand the business objectives; establish program governance; establish the project team; formally kick-off the project
- **Plan:** Conduct process, platform, and integration workshops; define, review and prioritise the product backlog; release planning; finalize the project timeline; document the test strategy; setup the environment
- **Execute:** Run agile scrum cycles; define support processes and hypercare approach; execute communications and awareness roadshows; plan for system and user acceptance testing
- **Deliver:** System testing and user acceptance testing; go-live planning; operational readiness; training; go-live
- **Close:** Operational handover; hypercare support; lessons learned; measure value and champion success; formally close the project

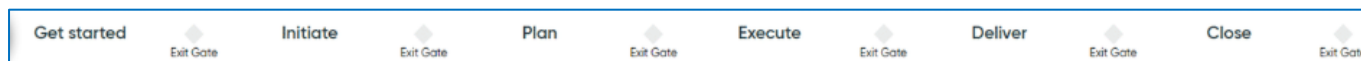
The Now Create methodology and associated workstreams, processes, tasks, templates and assets are organised into Success Packs based on specific outcomes for ServiceNow products.

Beyond the step-by-step guidance, the Success Packs also provide contextual recommendations and other capabilities to help you achieve your desired outcome.

In order to deliver consistent engagements, we will utilise the core platform technology and applications such as:

- Project and Portfolio Management
- Agile Development
- Test Management Components from the Strategic Portfolio Management (SPM) Suite

The aforementioned elements serve as the foundation for all customer engagements, populated within common data that embodies the best practices for ServiceNow implementation.



At the conclusion of each phase, we will seek formal approval from the customer before proceeding to the next stage (Exit Gate).

Phase end milestones are denoted below:

Phase Name	Milestone
Get Started	Defining project vision, scope and objectives
Initiate	Understanding the business objectives
Plan	Conducting process, platform and integration workshops
Execute	Running agile scrum cycles
Deliver	System testing and user acceptance testing and go-live
Close	Operational handover and formal closure of the project

We are committed to employing an agile implementation methodology to ensure the development and delivery of our customers' ServiceNow solutions are efficient, adaptive and successful.

Agile methodologies break the project into smaller increments called sprints. Each sprint focuses on delivering a specific sub-set of features or functionalities which work towards delivering a customer's full functional requirements. The delivery approach is iterative, with each phase building upon the previous one for optimal ServiceNow solution implementation.

2.5 Inputs

We would expect the following inputs from you as part of this service:

- Corporate Sponsorship (Executive Sponsor)
- Timely access to Stakeholders and key users to operate jointly with us, and who can provide input to the to-be design and review and approved developed deliverables.
- Key skills and capabilities
- Access to information and documentation including as-is processes and success metrics
- Client Resources include Technical Resources and Subject Matter Experts (SME)
- Understanding of ways of working and overarching goals
- Current Tooling Landscape
- Current Tooling Architecture
- IT Tooling Strategy
- Enterprise Level tooling Strategy

This is a high-level list and is not exhaustive.

2.6 Outputs & Deliverables

Some of the outputs and deliverables generated from the service are identified below:

- Get Started
 - Define project vision, scope and objectives
 - Identify key stakeholders and establish governance

- Confirm resources, roles, and responsibilities
- Begin Organisational Change Management (OCM) and testing strategy planning
- Initiate
 - Understand the business objectives
 - Establish program governance
 - Establish the project team
 - Formally kick-off the project
- Plan
 - Conduct process, platform and integration workshops
 - Define, review and prioritise the product backlog
 - Release planning
 - Finalise the project timeline
 - Document the test strategy
 - Setup the environment
- Execute
 - Run agile scrum cycles
 - Define support processes and hypercare approach
 - Execute communications and awareness roadshows
 - Plan for system and user acceptance testing
- Deliver
 - System testing and user acceptance testing
 - Go-live planning
 - Operational readiness
 - Training
 - Go-live
- Close
 - Operational handover
 - Hypercare support
 - Lessons learned
 - Measure value and champion success
 - Formally close the project

This is a high-level list and is not exhaustive.

2.7 Certifications & Skills

As an Elite Partner of ServiceNow, Sopra Steria provides the following differentiated capabilities:

- 100+ People with Presales Accreditation: Certified ServiceNow staff who determine the appropriate products to introduce as a solution
- 100+ People with Sales Accreditation: Sales staff who understand the value of the Now Platform and are certified ServiceNow experts

- 300+ People with Delivery Accreditation: Certified implementation specialists with industry experience and proven knowledge on the Now Platform
- 19x CTA – Certified Technical Architect and 1x CMA – Certified Master Architect capability, supplemented with a wide range of products to support all business and organisations of any size and complexity.
- Business Change and OCM (Operational Change Management)
- Majority UK Security Vetted individuals for higher classification engagements
- Average CSAT score of 4.74 out of 5

This is a high-level list and is not exhaustive.

3 Pricing

Please refer to the Pricing Document for this Service.

4 Next Steps

4.1 Contact

Please contact us if you would like to know more about any of our listings on G-Cloud.

Email: sector-support@soprasteria.com

As all of our G-Cloud enquiries initially come into a single contact, please remember to tell us:

- Your name, your organisation name and contact details
- Which service you are enquiring about
- A brief summary of your requirements or problem statements that you would like support to address.

4.2 More Information

More information about our services and capabilities can be found on our website [here](#).

