G-CLOUD 15 FRAMEWORK

SERVICE DEFINITION
Gauri – Salesforce CRM Advisory, Implementation and Support Services
Cloud Support

ISSUE 1

Company Overview

Gauri specialises in providing unrivalled Customer Engagement and Insight solutions on market leading platforms including SAP C/4HANA, Salesforce.

We offer our clients exceptional value for money and our proactive, collaborative development approach delivers the highest quality technology solutions enabling our clients to operate effectively, adapt with agility and achieve sustainable growth.

We are passionate about meeting the needs of our clients through building effective and trusted partnerships, which has enabled us to achieve a 95% client retention rate. We operate with complete commercial integrity and build solutions that enable our clients to maximise their success.

The Gauri Difference

Gauri is recognised for its expertise in customer engagement and delivering process improvements and technology enhancement. Our extensive business experience across both private and public sectors gives us the industry knowledge to deliver joined up customer engagement solutions across sales, marketing, service, field service, social communications, grants managements and e-commerce. To complement these processes, we also offer Predictive Analytics capabilities providing our clients with real-time business insights. Our integration practise is highly specialised in delivering integrated platforms across Cloud and On-premise from multiple platform vendors such as SAP, Salesforce, Talend and Mulesoft, providing a genuine 360 degree view of your customers or citizens.

We provide assurance in delivery including:

- Guaranteed delivery time line.
- Zero P1 incident post Go-Live.
- Reduced technical debt by following Best Practice.
- 'Right Shore Model': Right People, Right Time, Right Place.
- Long serving, highly motivated and talented consulting team.

Innovative commercials including:

- Fixed price with transparent resource loading and rate card.
- Time and Material agreements with a fixed price ceiling.
- A risk tolerance loading well below the market average.

Our Ethos:

- We strive to make our customers self-sufficient.
- We work with our customers and not just for them, to deliver their vision.
- We strive to build partnerships based on trust, transparency and flexibility.

Our Environment Policy

Gauri Ltd. is committed to continuous improvement of its Environmental Management System (EMS), which includes waste minimisation, reduction in pollution, and compliance with all relevant environmental legislation and regulations of the United Kingdom (UK). The company will meet or exceed the environmental requirements of other organizations to which Gauri Ltd. subscribes.

Certifications

Gauri has a following certifications:

- ISO 9001:2015 (Quality)
- ISO 14001:2015 (Environmental)

Don’t just take our word for it

Gauri has clients across a diverse range of industries, including the Public Sector, Retail, Wholesale, Distribution, Consumer Goods and Manufacturing. We maintain an exceptionally high rate of client retention with customers such as The National Lottery Community Fund, Arco, MOSL, Openfield, Roper Rhodes, CMS Distribution, Stelrad Radiators and Groupe Atlantic UK. We are committed to client satisfaction and ensuring flawless project execution, on time and to budget.

Service Description

The following section provides an overview of our "Gauri Salesforce CRM Advisory, Implementation and Support Services" and our agile based implementation approach. In addition to this, we can also provide a range of consultancy services such as Quality Assurance, Solution Architecture, Audit and Training.

An overview of the G-Cloud Service

Service Overview

Our Cloud based business solutions energise and empower brands to engage with their customers with realtime information and collaboration. As the world grows smaller and more complicated, technology plays an important role and enables individuals to drive their vision while also helping organisations to manage their end-to-end business processes. Our cloud version of the Customer Success platform from Salesforce provides access to the sales, service, marketing and community functionality, can empower organisations to engage with their customers, prospects and partners collaboratively and ultimately grow their customer footprint**.** Our reporting suite and accelerators built on Salesforce provide deep insights into business performance at management and operational level. Our service add on accelerator allows Salesforce to easily integrate with SAP ECC for Master data and service processes like Service contracts, notifications and Inventory management.

Salesforce customer success platform:

Salesforce is one of the leading platforms in the world of Customer Relationship Management, providing a range of features in Sales, Service, Marketing, Field Services and Community.

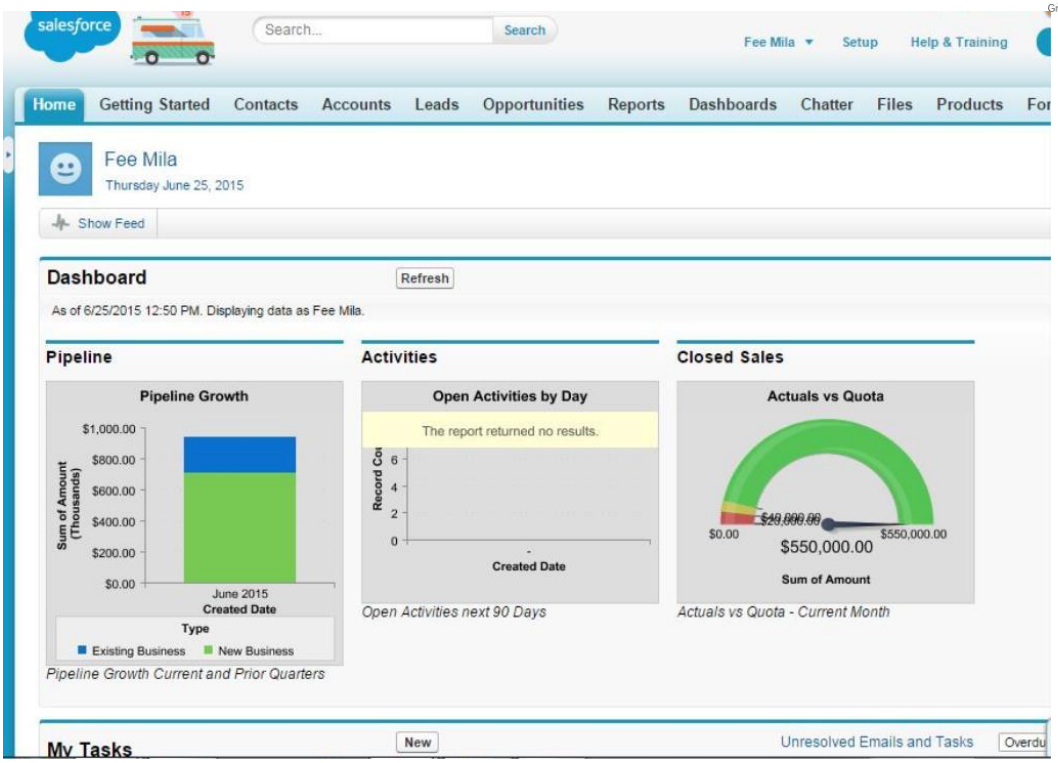
Sales Cloud:

Sales cloud helps sales teams grow their accounts faster, find new customers faster and close deals faster, from anywhere.

Key features of the Sales cloud include:

- Account and contact management
- Opportunity management
- Lead management
- Sales data
- Outlook Integration
- Mobile Active
- Workflow and approvals
- Quotations
- CPQ – Configure, price and quote
- Sales Forecasting
- Files sync and share
- Reports and dashboards
- Social media integration

Sales Manager dashboard



Pipeline Growth Current and Prior Quarters

Open Activities next 90 Days

Actuals vs Quota - Current Month

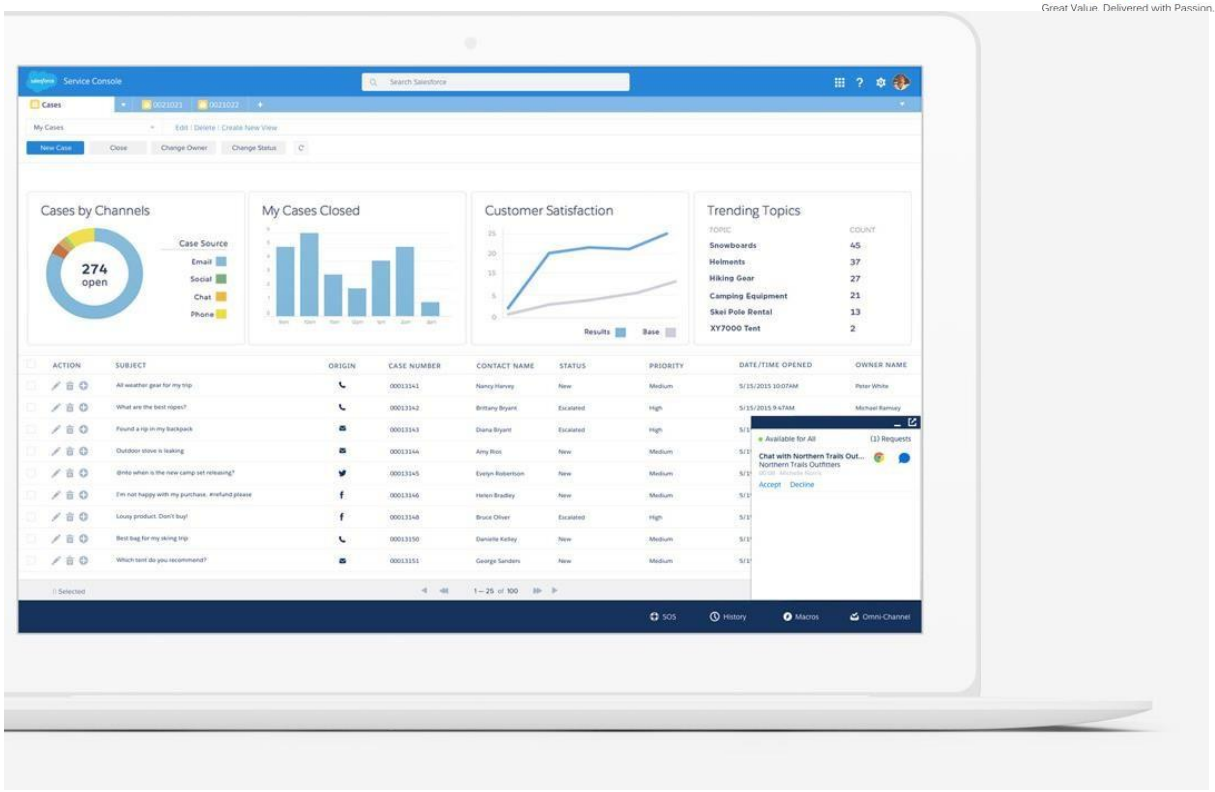
Service Cloud:

The Service Cloud is a modern intelligent customer-centric solution; enhancing the service experience by allowing faster than ever resolution of customer issues in an extremely personalised way.

Key features of the Service cloud include:

- Personalised care – providing customer information on the fly
- Diversity of channels for case handling & support
- Centralised console for multi-case administration at once & faster resolution
- Hawk eye view of your agents' availability via the Supervisor Console
- Field Service execution on your fingertips via mobility
- Extensive knowledge base for customer self-service via communities
- Integration with back-office applications
- Comprehensive real-time reporting & analytics

Customer Service representative dashboard



Field Service Resource planning and optimisation tool

Example:

Before running the service scheduling optimizer:

- 62 scheduled hours
- 24 minutes average travel
- 51 scheduled jobs



After running the service scheduling optimizer:

- 69.5 scheduled hours
- 15 minutes average travel
- 56 scheduled jobs

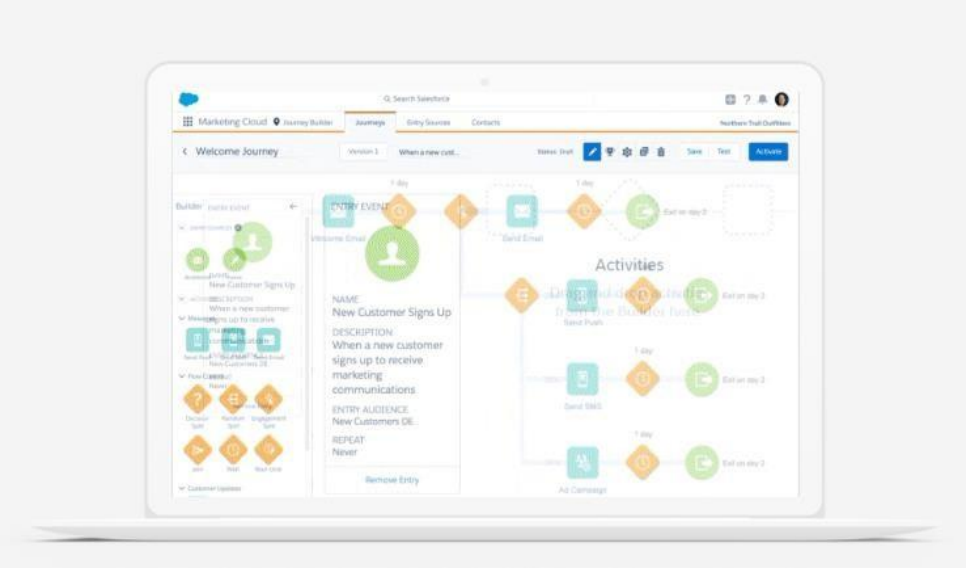


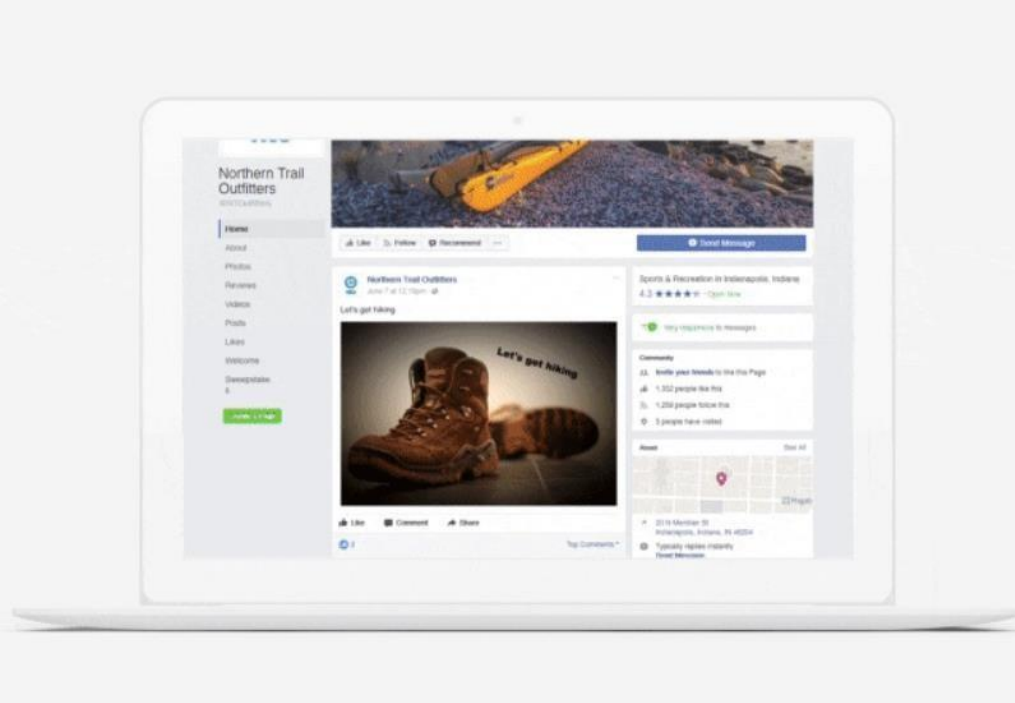
Marketing Cloud:

The Marketing allows to engage with your Customers with the right message, in right tone, at the right time.

Key features of the marketing cloud include:

- Be consumer centric
- Market smarter with AI
- Connect every interaction
- Manage both businesses and consumers using single platform
- Pre-built templates, streamlined message flows and mobile apps to easily create and execute cross channel campaigns
- B2C Journey management, Email Marketing, Social Media Marketing, Audience Studio, Digital Advertising and B2B Marketing Automation



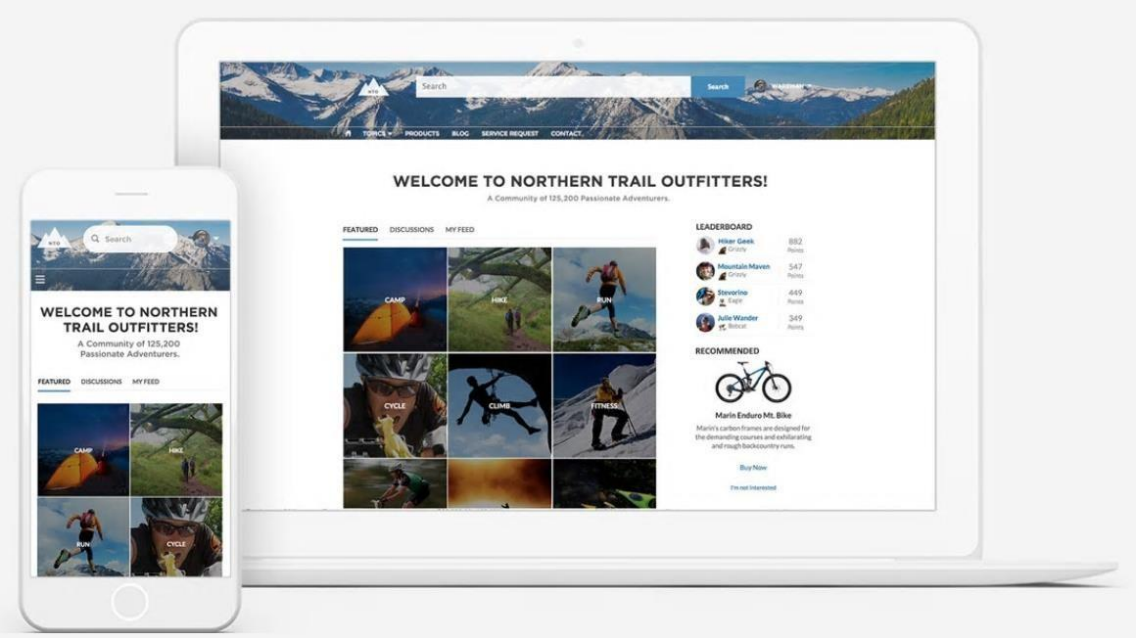


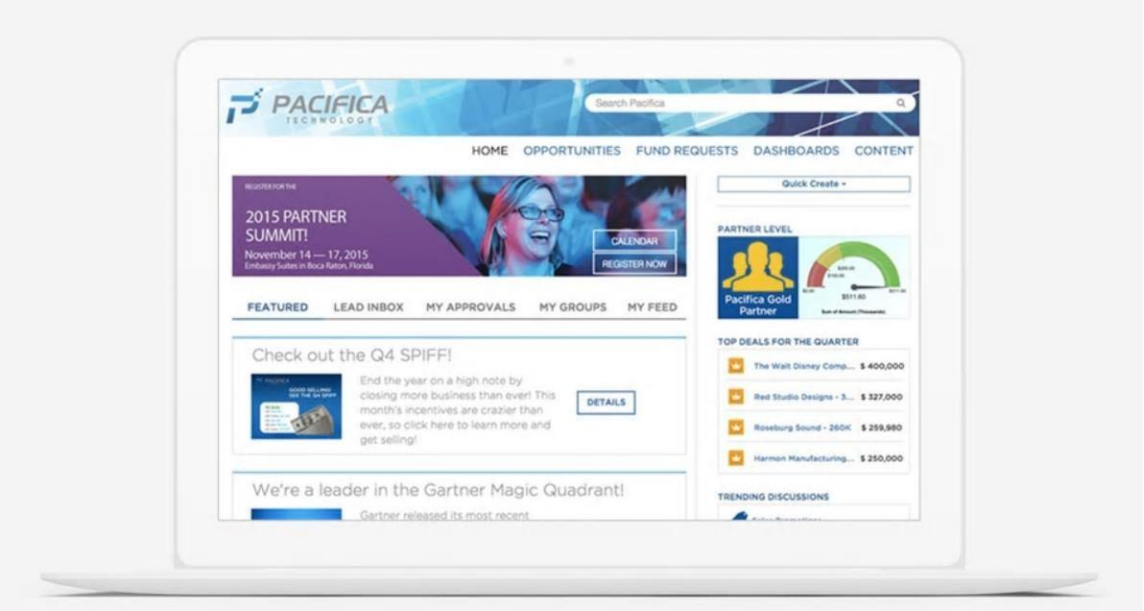
Community Cloud:

The community Cloud allows CRM powered experience for all your partners, accounts and customers to think outside the box.

Key features of the community cloud include:

- Build Community
- Connect with your Customers
- Grow Partner Sales
- Empower your Employees

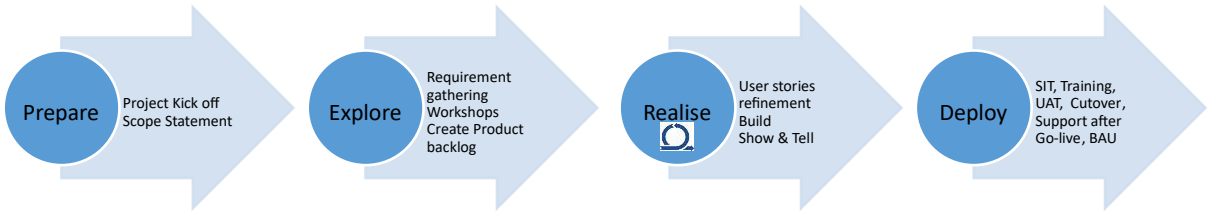




Implementation Methodology

Depending on the project, we follow one of the below implementation methodologies:

A. Hybrid Methodology (Waterfall with Agile: Scrum Framework):

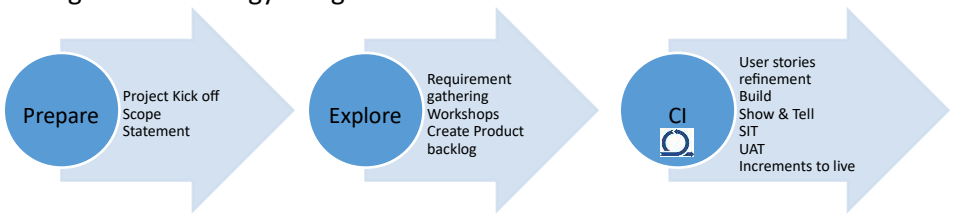


It has the following steps:

1. Prepare
    a. Project Kick-Off
    b. Scope Statement
2. Explore
    a. Requirement gathering Workshops
    b. Determine all configuration values
    c. Create a Product backlog
3. Realise (executed using Scum framework)
    a. User Stories Refinement
    b. Configuration/ Development
    c. Show & Tell
    d. Sprint Retrospect
    e. Test system Preparation
4. SIT Execution (with and without migrated data)
5. Train the Trainer
6. UAT
7. Cutover

8. Go-live
9. Post go-live Support
10. BAU

B. Agile methodology using Scrum framework:



It has the following steps:

1. Prepare
    a. Prepare Project
    b. Project Kick-Off
    c. Scope Statement
2. Explore
    a. Requirement gathering Workshops
    b. Determine all configuration values
    c. Create a Product backlog
3. Continuous increments
    a. User Stories Refinement
    b. Configuration/ Development
    c. Show & Tell
    d. Sprint Retrospect
    e. SIT testing
    f. UAT
    g. Send the increments to Production

To ensure project is on track, our project manager will share weekly progress report. Our project manager will also work with client project manager for ensuring that Change Management is been taken care from early phase of project. Issues, change log and risk registers will be maintained to manage the above items with a clear focus on effective communication and transparency.

Back Up & Restore

Redundancy and Scalability

The service is highly scalable and redundant, allowing for fluctuation in demand and expansion of users while greatly reducing the threat of long-term outages. Load-balanced networks, pools of application servers, and clustered databases are some of features of our design. The above is provided by Software vendor.

Disaster Recovery

The service is based on a primary and secondary model whereby customer data is stored in 2 locations and replicated over secure network links. This enables improved service availability around maintenance and disaster recovery. The above is provided by Software vendor.

Backup

In addition to vendor provided disaster-recovery capabilities, customer data is also backed up both within the local and remote data centre in region. Backups are not transported away from the data centres, reducing the risk of loss.

Restore

If a user deletes some information, e.g. a single record, the system provides a “Recycle Bin” where all deleted records will reside for at least 15 days before being deleted from the online system. In this way, the user or an administrator can “un-delete” or restore records from the recycle bin during this 15-day window. Additionally, the security model supports CRUD (Create, Read, Update or Delete) record level security so the customer administrator(s) can set up user profiles controlling uniquely whether a user can Create, Read, Update or Delete a record.

For our Insight services, our Visualisation tool consumes data from various data sources to build reports and Data visualisation. The tool by itself doesn't produce any data - but if there is any restore requirement, data can be re-extracted from various data sources.

On-boarding processes/scope etc.

We follow a defined process for on-boarding new clients to ensure that they have the assurance of our help, whilst at the same time remain in control of the cloud services which are often at the core of their business.

Our buying process is very simple, customers can call (01522 243123) or email (info@gauri.com) us and our sales team will connect with the customer with for further details. As a process, we would request customer to have a high-level requirement ready so that our sales team can fast track the demo and implementation process. We recommend having face to face meeting with our Solution Architect & Sales team where we can do our demonstration of solution and to clarify any open requirements.

We provide a high-level project plan with implementation cost and timelines after the requirements has been finalised. Once the project plan is approved and license procurement contract has been signed we start the resource on boarding to project.

Our is a SaaS (Software as a Service) solution and users access the tools via a web browser. Therefore, no software or hardware deployment is necessary. Implementation takes the form of assigning usernames and passwords to staff. The service provides many configuration options, including integration with custom applications

User enablement is a critical element of this offering and contributes to our solution receiving extremely high scores for benefits realisation. Onboarding starts with the many free, bite size training videos available from the software vendors’ website with support from the account team and with the vibrant software vendors’ user community

Off-boarding processes/scope etc.

As part of project completion, we provide the high-level design document along with solution document with enhancement details. We provide the Administrator training to the customer’s super users as part of the project implementation cycle, so that after project completion they can manage the system themselves.

Off-boarding from the service is as simple as exporting and downloading your data if you choose to do so. We provide your data in an industry standard readable format to make it as easy as possible for you to migrate to another service if you wish to do so.

Service management details

"Gauri Customer Engagement and Insight Services" solution is based on the SAAS principles, which requires clients to follow best practises. Solution allows for UI personalisation and value configuration. However, brand new features and functionalities cannot be easily incorporated as the solution is cloud based.

Our Cloud solution comes with standard software vendors' SLA for performance and system availability. The solution has a calendar which will always shows the planned outages (which are performed during non-business hours).

System will provide at least 8 hours' electronic notice for any Planned downtime and this will typical carried out during the weekend hours.

We also provide additional support for clients on regression test for upgrades as Time & Material. But this is an optional service for customer based on solution complexity.

Training

Our approach to training is to follow 'Train the Trainer', in which we train super users on the system functionality, system administration along with training on creation of new reports and Dashboard. We provide these trainings to super users, which can be face-to-face or remotely.

Ordering and invoicing process

We expect customer to sign a SOW (Statement of Work), which will be created on back of our meeting with business and high-level project plan. This SOW will cover the project deliverables & various milestones during the phase of project. Invoicing can be either milestone linked or on a Time & Material basis. We have 30-day payment terms from Invoice date.

Customer can make the payments through Cheque, Demand Draft or Bank transfer.

Termination terms

Please refer to section 10 "TERMINATION" of our "Terms and Conditions" document.

Data processing & storage location

Our Solution is SaaS based and the data is stored in respective Software vendors' data centres. The Data usage will be based on license compliance from respective Software Vendors like Salesforce. We as a service partner will provide services based on the license customers subscribe to.

Data restoration / service migration

Our solution has a restoration point, using which we can roll back to a specific restoration point. But we don't anticipate this for our solutions, as we have options to rectify the data by either reloading the data source again, which will overwrite or refresh the system to original configuration point.

Customer responsibilities

We expect the following from customers during the full life cycle of project:

- Availability of Project Stakeholders
- Scope Freeze
- Super Users Availability
- License Subscriptions in advance for project start
- Data Extraction & Cleansing from legacy system(s)

- Data transformation into our predefined file formats
- Access for our team to your new cloud systems
- Documented System requirements

Technical requirements (service dependencies and detailed technical interfaces, e.g. client-side requirements, bandwidth/latency requirements etc.)

Depending on the individual project requirements (sales, services, analytics and visualisation), the technical requirements could vary. List below is broad level indicative information which could be used as a reference:

● Hardware Requirements

Intel Core 2 Duo (2.4 GHz with a 1066 megahertz {MHz} front-side bus) or better

Memory 32/64-bit OS: 4 gigabytes (GB) or more ● Network Requirements by number of users:

Small, trial: 1 Mbps

Medium, 50 users: 2 Mbps

Large, 100 users: 4 Mbps

Extra-large, 250 users: 10 Mbps

XXL, 500 users: 20 Mbps minimum Latency:

200ms or better

Browsers

Our Solution can be accessed on following browser:

- Microsoft Internet Explorer® 11
- Google Chrome™ 46
- Apple Safari® 8
- Firefox™ 40

Our solution can also be accessed using a dedicated apps to support on various devices

- iPad Mini 2 with iOS 8 and above
- iPhone® 6 with iOS 8 and above
- Android™ Tablet with Android 4.4.2 and higher **Details of any trial service available.**

N/A

Use Cases / Case Studies

Our case studies are available from our website https://www.gauri.com

Some of our Clients

Our clients and partners are:















Contact details

Gauri Ltd, 01522 243121 (Office), Digital.marketplace.uk@gauri.com