

HaloCRM

G-Cloud Service Definition



COMPANY OVERVIEW

Who are HaloCRM?



HaloCRM is a privately owned and run company that offers Customer Relationship Management (CRM) software. It has been carefully developed since 1994, meaning that we have over 30 years of expertise in the industry. This allows us to offer highly competitive software, fuelled by constant innovation to meet the needs of an evolving market. The product has been developed to fit organizations of any size and from any industry, but with keen focus on the public sector and their requirements. In fact, 46% of our customer base is the made up of public sector clients, making our insight unique amongst CRM providers.



Value Proposition

We pride ourselves on being a proactive company that listens to service and solution feedback from all customers, whilst responding to a dense and security conscious marketplace. The software provides an extensive, feature rich application, strong security accreditation, all at a competitive price with first-class support from experts in all departments. Furthermore, HaloCRM is trusted by a global customer base, with over 100,000 customers from 50+ countries using HaloCRM in a variety of languages including English, Spanish, French, Italian, Welsh and more.

Locations

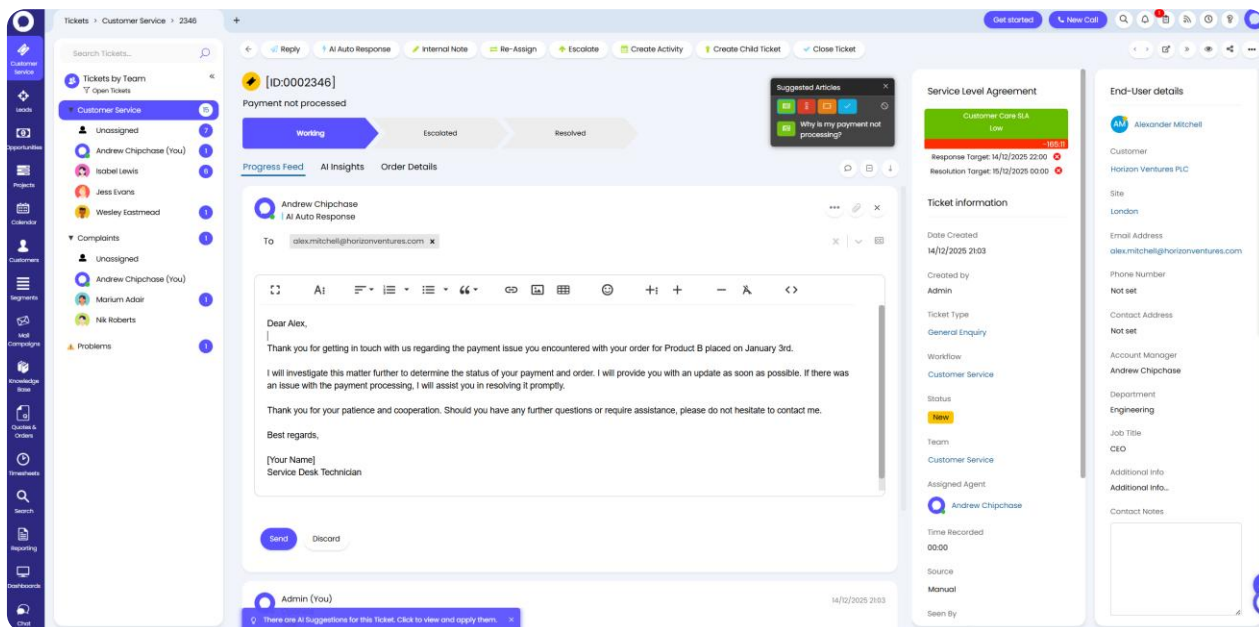


HaloCRM is a global company with a global mindset, offering a 24-hour support system due to our worldwide time-zone coverage. With offices in Suffolk (UK), Bellingham (USA), Orlando (USA) and Melbourne (Australia) we can support you wholly during the working week.

KEY FEATURES

Omnichannel Support

HaloCRM is a centralised hub for all customer communications. Customer enquiries can be ingested via email, phone calls, our new web widget, Facebook, live chat and even via our AI chatbot! These are then displayed in the agent workspace, with context and customer journey information always at your agent's fingertips to allow them to give the best personalised service possible. Store B2B and/or B2C contact information in our new contacts database, storing contacts social media tags and more.

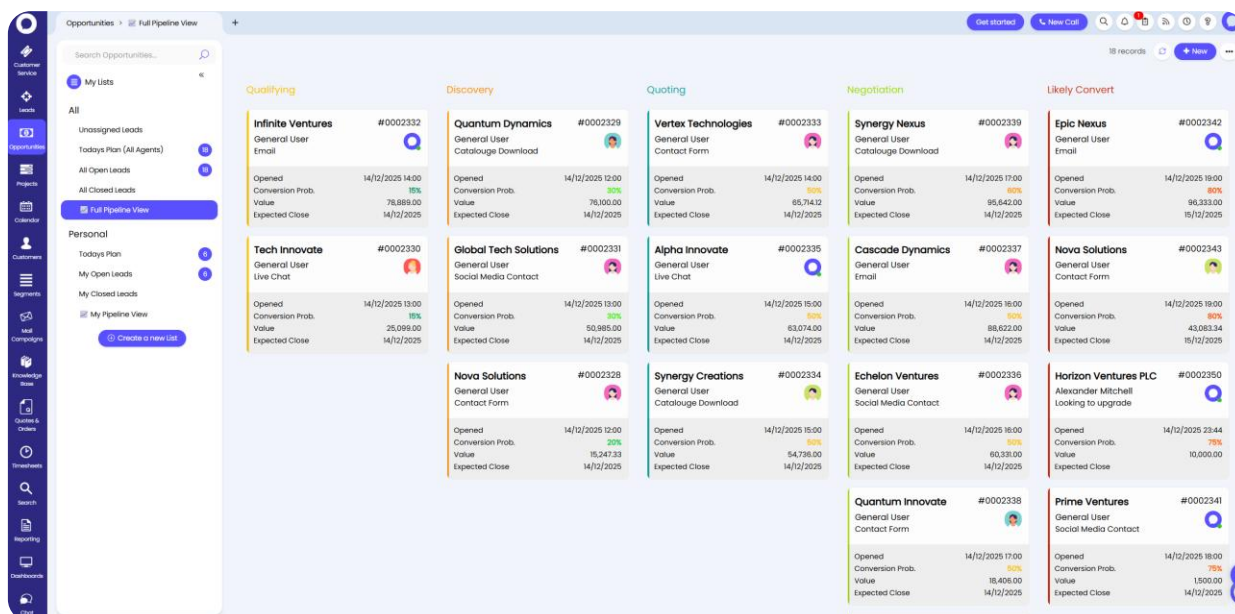


The HaloCRM self-service portal can be wholly white labelled and it's configuration is completely codeless. Options for customers can be altered in a drag and drop editor, with buttons like case logging, multi-department service catalogue, booking forms, integrated knowledge base and operational service status pages configured out-of-the-box. User experience is driven by our virtual agent, and our Google-style search bar which allows users to search through all core entities using a single phrase or question.

KEY FEATURES

Opportunity Management

With powerful out-of-the-box workflows and easy drag-and-drop configuration, HaloCRM can handle it all. Halo can help you close deals faster, engage more customers and grow revenue with the most complete CRM solution. The contact management system is intuitive and easy to navigate just like every other area with an unlimited number of custom fields being tracked from any source. These contact lists that are created are easy to filter either with just a one click in the column title or by creating a sub-list with multiple filters. Multiple pipeline views can be created and filtered based on any criteria, whether that's product type, customer category or conversion probability.

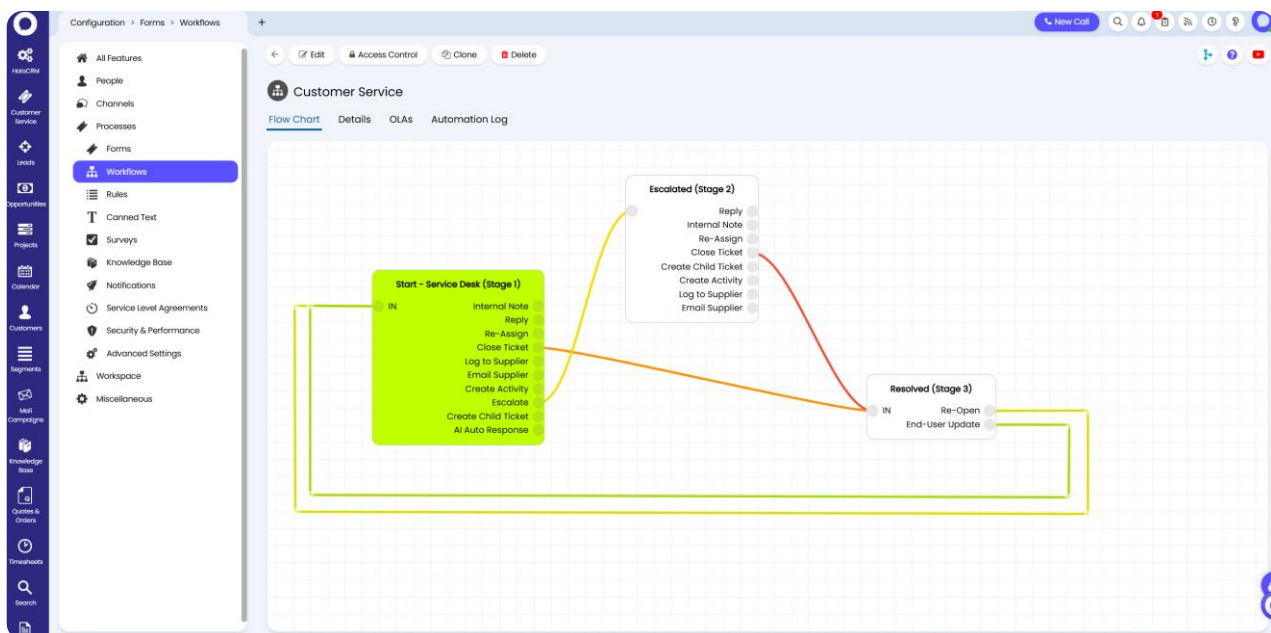


HaloCRM's lead and opportunity management areas work seamlessly with the Marketing and Customer Service modules of our all-inclusive CRM making customer journey mapping much easier. When viewing customer/contacts, one page can show you all their opportunities, campaigns, contacts and general activity for a truly collaborative CRM.

KEY FEATURES

Automation

HaloCRM's automation engine will streamline your operations by eliminating unnecessary manual process. This includes ensuring manual task allocation is a thing of the past through automatic task routing, sending automatic notifications through a variety of channels (such as email or SMS), and even automatically escalating tickets based on rulesets of your own design. The system can even automatically prioritise and allocate records based on enquiry content, ensuring the most important enquiries are always seen to first.

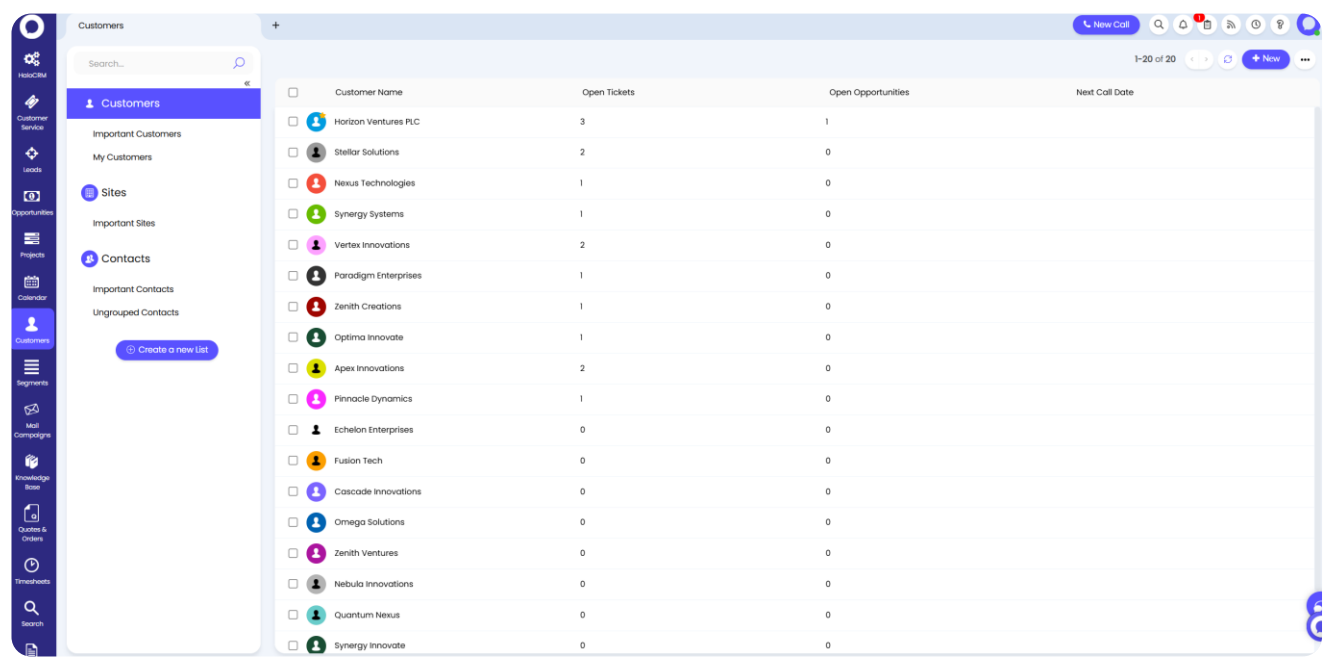


The HaloCRM automation engine also facilitates orchestration outside of the system. This allows work items to be automatically fulfilled, such as the creation of customers in accounting tools, or granting access to a shared drive from a service request made on our self-service portal. We offer out-of-the-box integration with orchestration tools like Microsoft Orchestrator, Powershell and Azure Automate to carry these processes out, and have a bank of scripts your organisation are welcome to leverage should you desire.

KEY FEATURES

Templates

In addition to workflows and automations, templates can also be used to control a specific process that must be adhere to across all departments and processes. For example, automatically creating child tasks from a completed sale, allowing for the seamless transition of information from sales teams to the creation of new customer records for the customer support team. The creation of these child tasks can be controlled by creation rules set within the template which ensure tasks are created at the right time and only in the correct circumstances.



☐	Customer Name	Open Tickets	Open Opportunities	Next Call Date
☐	Horizon Ventures PLC	3	1	
☐	Stellar Solutions	2	0	
☐	Nexus Technologies	1	0	
☐	Synergy Systems	1	0	
☐	Vertex Innovations	2	0	
☐	Paradigm Enterprises	1	0	
☐	Zenith Creations	1	0	
☐	Optima Innovate	1	0	
☐	Apex Innovations	2	0	
☐	Pinnacle Dynamics	1	0	
☐	Echelon Enterprises	0	0	
☐	Fusion Tech	0	0	
☐	Cascade Innovations	0	0	
☐	Omega Solutions	0	0	
☐	Zenith Ventures	0	0	
☐	Nebula Innovations	0	0	
☐	Quantum Nexus	0	0	
☐	Synergy Innovate	0	0	

Templates can also handle any to-do lists that are associated to any processes and ensure these are completed and audited before something is progressed. Creating templates is very simple in HaloCRM, with this process enhanced by the ability to clone existing templates and save ticket records as templates to be applied in the future.

KEY FEATURES

Reporting

HaloCRM's reporting suite comes out-of-the-box with over 800 pre-configured reports and several operational dashboard, giving your organisation the insights they require into productivity and customer happiness. Such as average call handling time, missed call rates, SLA compliance and feedback. We will also give you access to our online reporting repository, filled with reports we have written for our clients as part of our free of charge report writing service.

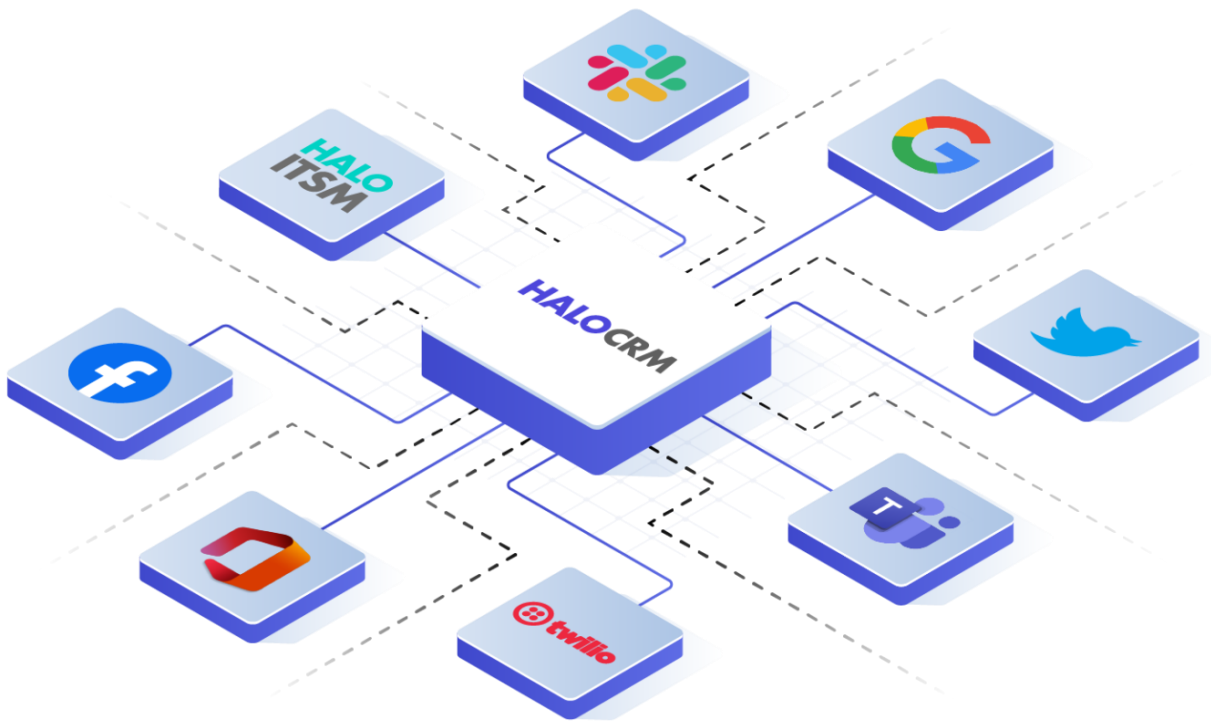


As well as the above, the reporting suite in HaloCRM also includes the ability to seamlessly build graphs as part of the reports – and trendlines can automatically be derived/displayed/exported from those reports simply by ticking a checkbox. Reports in HaloCRM can be easily exported to Excel, printed to pdf or sent via email. You can set up any report to be sent by email on a schedule of your choosing, allowing key data to be in your inbox automatically.

KEY FEATURES

Integrations

HaloCRM is a highly integrated platform, with over 150 integrations already in place. All the systems that your organisation depend upon, such as your telephony system, mailboxes and more, can be seamlessly integrated with HaloCRM at no extra cost.



New suites of integrations are also being added every 3 months with our quarterly release cycle giving your organisation more options to stay connected. The majority of our integrations are listed here: <https://halocrm.io/integrations/>, speak to us if you don't see one of your systems listed.

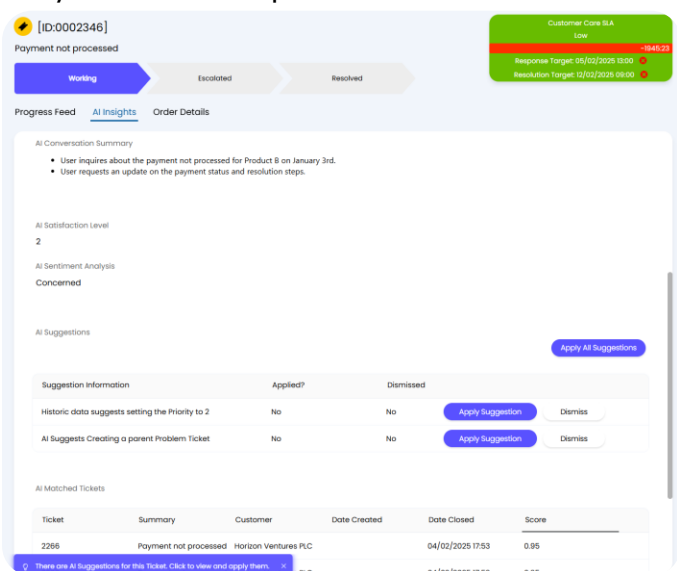
KEY FEATURES

Artificial Intelligence

Take advantage of Artificial Intelligence with HaloCRM and experience the future of Customer Relationship Management today. Automate your processes, gain valuable insights and truly understand your customers with AI to further improve your business.

Optimisation of AI can be seen across a variety of areas and processes within HaloCRM including:

- Case evaluation
- Automated responses to customers
- Virtual Agent
- Report building
- Knowledge base creation
- Emotion detection
- Surveys



Data Source *

Use AI Query Builder

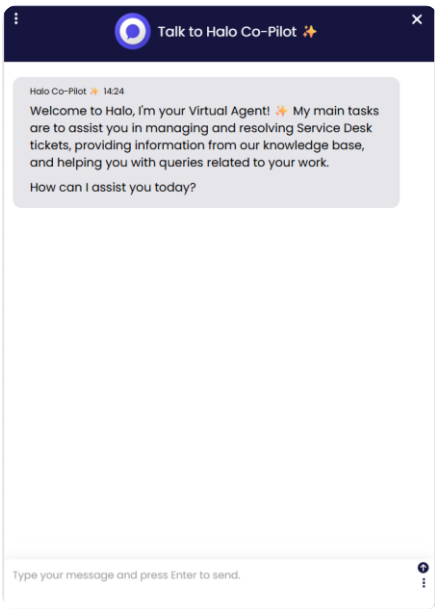
You can add more data sources by selecting Data Sources from the menu, or by downloading more from the Online Repository.

Enter a prompt to give the AI report builder. Ensure you are precise with your prompt and that you explain any user defined values, e.g. the names of Ticket Types. For a more detailed explanation on how to use the AI Report Builder and to view a collection of prompts to get you started, please consult the following guide [here](#).

Generate Report

Enter a prompt to give the AI report builder. Ensure you are precise with your prompt and that you explain any user defined values, e.g. the names of Ticket Types.

Write a query to return the summary and ID of all incident tickets opened this week. 'Incident' is the name of a ticket type.



SECURITY

Information Assurance



HaloCRM hosts Service Data in AWS data centres that have been certified as ISO 27001, PCI DSS Service Provider Level 1, Cyber Essentials certified and SOC 2 compliant. Our AWS infrastructure services have a multitude of physical security measures and internally, our globally distributed infrastructure and security team is on call 24/7 to respond to security alerts and events.

All Communication with HaloCRM UI and API are encrypted via industry standard HTTPS/TLS (TLS 1.2 or higher) over public networks. HTTP Strict Transport Security (HSTS) is also active on all app servers to keep all traffic secure at all points. TLS encrypts and delivers email securely, mitigating eavesdropping between mail servers where peer services support this protocol. Service Data and backups are also encrypted at rest in AWS using AES-256 key encryption. In terms of password security, asset password fields, client secrets and any other sensitive data are all encrypted using X509 Certificates.

AWS Scaling and protection services provide excellent protection along with our use of AWS WAF which identifies and blocks threats. Access to the HaloCRM Network is restricted by need to know basis. Only whitelisted IP addresses can access the network and access is restricted by role. This is regularly audited and monitored and is controlled by our Infrastructure Team. Multi Factor Authentication is also required throughout the network.

SECURITY

Business Continuity

Our Disaster Recovery Plan ensures that services remain available and are easily recoverable in the case of a disaster. This is accomplished using robust network architecture and the use of multiple availability zones at AWS data centres. HaloCRM uses service clustering, network redundancies and failover to eliminate any single points of failure. Strict hourly backup schedule and use of multiple availability zones in each data centre enable us to deliver high level of service availability. Back ups can be restored in event of a region-level outage, with our RTO at 2 hours and RPO at 5 minutes.

HaloCRM maintains a publicly available status page at <https://status.haloservicedesk.com> which includes system availability details, scheduled maintenances and any service incident history.

Network Security

Our network is protected using key AWS security services such as AWS WAF and shield using AWS Managed rule sets which monitor and/or block known malicious traffic and network attacks. All requests are logged and are regularly audited internally. Regular Network security scans give us deep insight for quickly identifying any potential vulnerabilities in the system.

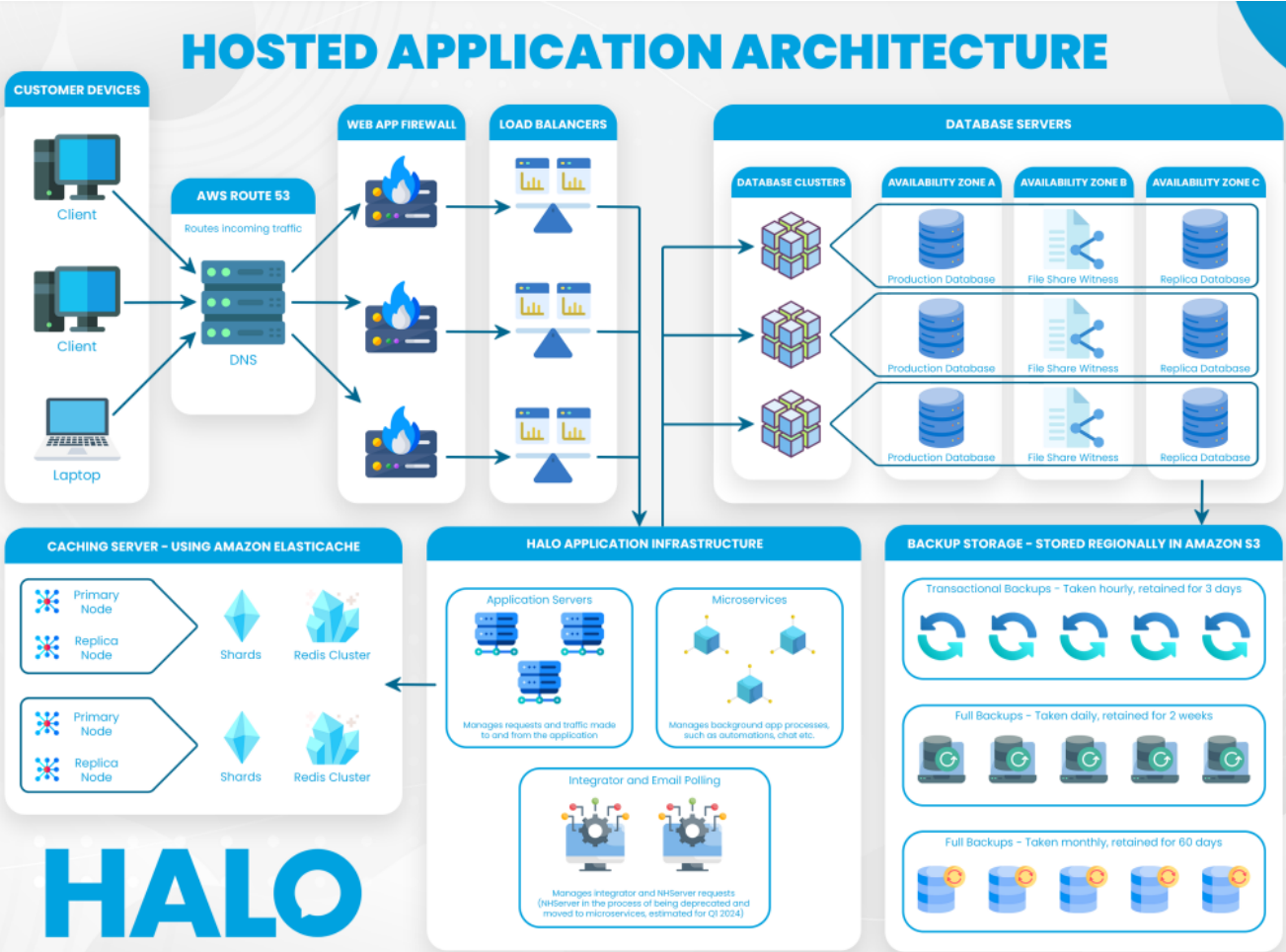
HaloCRM employs third-party security experts to perform a broad penetration test across the network. This is in addition to the internal scanning and testing performed regularly. Service points are constantly monitored to detect anomalous behaviour. Systems are configured to generate alerts if certain values exceed certain thresholds. These are monitored 24/7. Further detail can be found here:

<https://halocrm.io/security/>

SECURITY

System Architecture

Below delineates the standard HaloCRM system design



Trial Availability

Welcome to HALO CRM

HALO CRM[Start Trial](#)

SECURITY

Purchasing Process

HaloCRM have a simple purchasing process, just start by emailing or calling us via the details at the end of this document and tell us a little about what you're looking for. One of our CRM experts will then guide you through an initial discovery call to learn more about your needs, usually in preparation for a technical system demonstration. Commonly prospective clients then go through a referral call with one of our existing customers, some further technical calls to confirm system integration and security, before finally working closely with us to ensure a smooth contract sign-off process.

Outcomes

A better relationship with your CRM provider, which doesn't stop post-sale.

A richer and more intuitive end-user experience, leveraging more than 15 channels.

A deeper understanding of trends and performance for all departments through our in-built reporting function and drag and drop dashboards.

Greater control of the configuration of your system, with an intuitive, low/no code UI.

Mature adoption of AI, through case evaluations, automated responses, reporting building, Virtual Agent and more.

LICENSING

HaloCRM operates with a simple, all-inclusive model when charging for procurement of the software. We do not charge for contacts, storage or functionality in a modular structure, instead we will only charge you for the number of agent licences you require. No tiered-plans or locked-away features, just all-inclusive CRM.

The per-license cost will decrease with economies of scale as the number of licenses you require increases. This is true throughout the duration of your contract with us, not just when initially purchasing the platform, giving our clients an incentive to grow and bring other teams into the platform. All prices listed exclude VAT and are preferential for the G-Cloud 15 Digital Marketplace and can be offered on single or multi-year contracts.

Agent Count	Named License Cost Per Month	Concurrent Licence Cost Per Month
<25	£45	£90
25-49	£41	£82
50-99	£39	£78
100-249	£35	£70
250-499	£29	£58
500+	£20	£40

PROFESSIONAL SERVICES

The HaloCRM support and customer experience departments are ready to help you get the most out of the platform, using their experience working with other clients in your sector, across the globe.

To guide our customers through the migration process we offer a variety of setup bundles to help you get off to the best start with HaloCRM in a one-off cost. Our onboarding approach differs from our competitors in that we use all stages of the process as a training opportunity, allowing your organisation to gain a 360° view of the system and learn HaloCRM best practices. This also means the future time and financial resource required to administer and expand the system is minimal.

Our onboarding approach follows 8 core steps; Discovery, Design, Build, Training, Testing, Go Live, Hypercare, Project Review. These steps ensure a risk free, low impact migration path for all our new clients, with the agent and customer experience at the heart of the build.

STEP 01 Discovery

Pre-sale discussion(s) to confirm exact requirements and scope the project.



STEP 02 Design

Pre and post-sales discussions to give both parties clarity on how the final build will look.



STEP 03 Build

Configuration of the system in accordance with the design plan.



STEP 04 Training

Administrator and service agent training seminars.



STEP 05 Testing

Final checks to ensure all processes and configuration are ready to go.



STEP 06 Go Live

Launch day! Start using HaloCRM, fully supported by your in-house consultant.



STEP 07 Hypercare

Early support with your use of the software, ensuring those crucial first weeks are plain sailing.



STEP 08 Review

A meeting with all key stakeholders from your organisation and



PROFESSIONAL SERVICES



Discovery

The discovery stage is the bridge between pre- and post-sales. This phase of the implementation involves solidifying the deliverables agreed in the sales process, confirming timelines (if not wholly confirmed during the sales phase) and gathering the relevant resources to make the project a success.

Ultimately, this phase should give us a draft configuration document which maps the path ahead to the design stage.



Design

The design stage allows us to work closely with your organisation to break down the core processes and adapt our product to your organisation's needs. This is carried out in a workshop style approach, focused on each process individually. This phase will conclude with a final configuration document, which can be used to progress to the build stage.



Build

Based on the consultancy package you've chosen, the build phase of this project will be executed by your team, our team, or a combination of the two. Regardless of the plan chosen, we highly recommend a collaborative approach is taken, to ensure the whole onboarding project is treated as a training process. Rather than just configuring the system and leaving you to guess what changes we have made, all sessions associated with the above deliverables will take place in workshops. Your team will see all changes being made, and explanations on the purpose of features, functions and their associated settings will be dissected to ensure full comprehension.

PROFESSIONAL SERVICES



Training

This phase encompasses any specific administrator training sessions, and training of your technicians. These are dedicated sessions to tie up any loose ends and ensure all your technicians are in the loop with how to use their new system. These can be recorded and retained if desired. We will also put together a full user guide, tailored to your system's configuration, should you desire.



UAT

The UAT phase is in place to ensure that the final build matches the deliverables agreed in the discovery phase. It is also a great space to get your technicians stuck into the software in earnest, and actively engage with their new system. Your technicians will assist in the testing of all the processes in the tool, gaining confidence in how to use the system at the same time. We recommend a few sample cases are pushed through HaloCRM and the incumbent system simultaneously, to confirm there is no loss in functionality and to see how time is actively being saved with the new system in place.



Go Live

The launch of your new HaloCRM system will take place on an agreed time and date, and we can support you remotely or on-site depending on the agreement made in the discovery stage. We like to take a hands-on approach during this phase, ensuring the initial launch of the platform is a total success and is carried out in a manner that is as risk-free as possible.

PROFESSIONAL SERVICES



Hypercare

Hypercare ensure your team get the best possible assistance in the early stages of using your platform. This is more tailored and has a tighter agreement in place for response and resolution times than our BAU service, ensuring your organisation is holistically supported during this crucial early period.



Review

Following the successful deployment of your new system, we will have a review session internally, and with your organisation, to celebrate the successes and learn from any points of improvement from your implementation project. This will be carried out with yourselves, your Customer Success Manager and your assigned project lead. Any areas for improvement will have action plans placed against them, to ensure remedial action is taken quickly and effectively.

PROFESSIONAL SERVICES

Please see the below HaloCRM professional services packages, including pricing and the services included. It is important to note that all the below option include extra project management time outside of the delineated meetings:

	Simple £5,000	Premium £16,000	Enterprise From £29,000
HaloCRM Consultant	Included	Included	Included
Timeframe	8 Weeks	16 Weeks	Tailored
Meetings Per Week	2x 1 Hour Sessions	3x 1 Hour Sessions	Tailored Plan
Delivery	Remote	Remote	On Site Option
Configuration Ownership	Client	Collaborative	HaloCRM
Project Management	Basic Implementation Plan	Standard Implementation Plan	Tailored Implementation Plan
Training Package	2x 1 Hour Sessions	4x 1 Hour Sessions	Tailored with Personalised "User Guide"

Extra weeks can be purchased at a rate of £700 + VAT per week.

SERVICE LEVEL

We have no tiered SLA offerings, just incredible customer service no matter your size or “value”:

Incident SLA	Response SLA	Resolution SLA
Priority 1 (Critical)	15 Min	2 Hours
Priority 2 (High)	1 Hour	8 Hours
Priority 3 (Medium)	2 Hours	16 Hours
Priority 4 (Low)	4 Hours	40 Hours

Request SLA	Response SLA	Resolution SLA
Priority 1 (Critical)	15 Mins	1 Hour
Priority 2 (High)	1 Hour	4 Hours
Priority 3 (Medium)	2 Hours	16 Hours
Priority 4 (Low)	2 Hours	40 Hours

Definitions:

- Critical = No access to the system or unable to use the system.
- High = Impacting day to day use and functionality.
- Medium = Impacting system functions but workaround possible.
- Low = Low impact for specific non-critical action.

SERVICE LEVEL

Customer Responsibilities



As with any CRM software, there is a level of customer responsibility that our clients must undertake. While we do everything in our power to guarantee customer security and have an impressive background of maintaining a safe and secure platform, users must be prepared to safeguard their own instance of HaloCRM. This includes the use of strong passwords, which are changed on a regular basis and where possible using HaloCRM's multi-factor authentication functionality. Furthermore, our customers are responsible for the general admin of their own HaloCRM instances. To facilitate this, we provide our customers with extensive training and configuration assistance courtesy of our highly trained consultancy team during the on-boarding process. We then have a dedicated account management and support team ready to help clients with any questions they have regarding configuring the system once they have gone live with HaloCRM. This approach gives our customers the freedom to configure and maintain the system in the way they wish, but in a highly supportive environment.

Customer Success



Your organisation will be given a dedicated customer success manager who will carry out monthly meetings with your team at a minimum. Our customer success managers are measured directly by client happiness and retention rates. We believe the open and honest communication lines we have between our success managers and our clients is what makes our retention rates so high. Clients feel comfortable coming to their success managers with any concerns or issues, because they know they will receive honest and timely responses which will genuinely resolve their issues. We recommend you discuss this with one of our existing customers.

SERVICE LEVEL

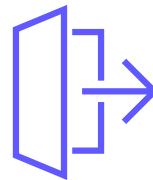
Support Team and Request Team



Our entire support team are educated to a minimum of degree level in a related field and are highly trained in every aspect of HaloCRM, including it's development. This ensures that when you get in touch your query will be resolved efficiently by an expert, not read from a script in a call centre. As all of our customers receive the highest level of support regardless of their size or revenue, our support system stays flexible and allows all problems to be triaged on severity, getting to the best person to resolve your query quickly and accurately. Support is available 24x7 for uptime issues, and 24x5 for configuration assistance.

We also offer a report writing service within your license cost. Any report that takes one of our expert consultants less than 1 hour to write is included free of charge!

Termination and Offboarding



HaloCRM or the customer in question can terminate the service. It is the responsibility of the customer to notify HaloCRM in writing of their intent to terminate their contract 60 days before their contract expiry date. This is stipulated in our terms and conditions available on our G-Cloud listing. Once the service is terminated, your data will be kept for 3 months or in line with the period agreed in the original contract. Once this period passes, your data will be deleted and will no longer be able to be retrieved.

SERVICE LEVEL

System Development and Upgrades



HaloCRM is fully developed in-house by our expert team. This means that as a company we have full granular control over our own roadmap and are uniquely positioned to genuinely listen to customer feedback and implement their ideas into the platform. This also means we can continuously provide fast version releases with new functionality, so our customers can expect new features and functions in beta versions at a minimum of once a month. You can view our online roadmap here: <https://halocrm.io/roadmap/>.

Upgrades are completed out of hours and completed with no downtime, with no retrofitting of code. HaloCRM uses a blue-green deployment strategy for making changes to the production environment which stops any downtime from occurring and provides us the option to roll-back without impacting our customers. New versions of the system are released quarterly, including new features and larger scale changes to make the system even more secure. Beta versions are released every two weeks, we usually recommend these are used in sandbox environments only.

TRUSTED BY GLOBAL BRANDS

At HaloCRM our solution powers organisations across the globe, driving efficient customer management and enabling our clients to deliver exceptional service levels. HaloCRM is a leading out-of-the-box platform, enhanced by flexible configuration and development delivered by our experienced team in partnership with our clients. Our partners benefit from the commitment and responsiveness that is the mark of our agile team. With a wealth of experience implementing our solution in the public sector, we are confident in our ability to deliver your project on time and to the highest standards. HaloCRM is the ideal partner for this project, and we thoroughly look forward to working with you.



Get In Touch

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