

HaloCRM

G-Cloud 15 (RM1557.15)

Service Definition - ArvatoConnect

Company overview

ArvatoConnect is 100% owned by Bertelsmann SE & Co. KGaA, the ultimate parent company of Bertelsmann Group a global, financially stable company. In 2024 the group's businesses, with over 145k employees, generated revenues of €18.7 billion and €3.2 billion EBITDA globally. Bertelsmann, provide the business with long term stability, investment and also global partnership opportunities. This enables ArvatoConnect to support the UK BPO and Outsourced Services market. Bertelsmann's strategic focus is on a fast-growing and high-earning digital, international and diversified Group portfolio. Businesses in which Bertelsmann invests have long-term stable growth, global reach, sustainable business models, high market-entry barriers and scalability.

Within UK public sector we are recognised for providing high quality, complex and compliance heavy solutions, not only as a current and proven provider within both central and local government, but also as part of all of the key frameworks, the mandated route through which the public sector procures BPO and CRM services.

ArvatoConnect is a clear leader in several vertical markets, supporting a number of the world's leading brands, including the challenging and highly competitive automotive space, where we are engaged delivering FCA regulated services.

Our technology partnerships, combined with our deep domain industry expertise have enabled ArvatoConnect to successfully deliver business transformation and digital enablement for our clients, resulting in improved efficiency, reduced cost to serve and, importantly, improved customer satisfaction.

With an embedded culture of partnership supported by a strong, highly experienced leadership team, ArvatoConnect is recognised as one of the leading outsource providers in the outsourcing market. The scope of our services includes –

- BPO and Shared Services.
- Contact Centre Solutions.
- Customer Experience Management.
- Digital Communication Solutions.
- Automation and AI Consultancy and Implementation.
- Financial Services Management (FCA Accredited).

The UK HQ is situated in Datchet (Windsor) Berkshire with sites in Newcastle, East Yorkshire and Swansea. The Swansea site is our principal BPO and Shared Services facility.

Service Description

HaloCRM is a flexible, cloud-based customer relationship platform that enables organisations to manage customer interactions, cases, and enquiries through a single system of record, providing a complete view of each customer's service history.

The platform supports no-code configurable workflows, case management, SLA tracking, automation, and reporting to help teams deliver consistent and timely services. HaloCRM

integrates with contact centre platforms, voice and digital channels, and line-of-business systems, enabling joined-up service delivery across departments.

Built with security, resilience, and compliance in mind, HaloCRM supports role-based access, audit trails, and data governance aligned to public sector requirements. Its rapid deployment and adaptability help public sector organisations improve service quality, increase operational efficiency, and support continuous service improvement while maintaining accountability and transparency.

Halo is a single platform containing three out-of-the-box solutions; CRM, ITSM, and PSA, bundled into a single license with zero hidden fees.

Service Features

- Unified customer records and journey visibility providing complete interaction history
- Case management with configurable workflows and automation
- SLA tracking and alerts ensuring service commitments are met
- Omnichannel case intake from email, web, and integrations
- Branded self-service portal, virtual agent and automatic article suggestions
- Automation rules reducing manual effort and response times
- Knowledgebase supporting consistent, accurate customer responses
- Role-based drill-down dashboards and real-time performance reporting
- Powerful and seamless integration with contact centre and third-party systems
- Multi-language agent and user interfaces - English and Welsh included

Service Benefits

- All-inclusive, non-modular software - no hidden fees or paywalls
- Codeless interface facilitating easy system adoption for multiple departments
- Enables personalised service using unified customer records
- Improves agent productivity by automating repetitive tasks
- Enables data-driven decisions with actionable management insights
- Strengthens brand reputation through improved customer experiences
- Guaranteed 99.95% uptime with industry-leading speed & performance

Onboarding and Offboarding

ArvatoConnect is your flexible and dependable delivery partner for cloud support projects.

Our team work closely with you to ensure the Halo platform is aligned with each of your organisation's systems and goals. We tailor our approach around your organisation's needs, reducing the effort required for mobilisation and ensuring a smooth, efficient start.

ArvatoConnect support new Halo users primarily through consultancy, deployment support, configuration, and ongoing expert guidance. We provide end-to-end project management and delivery, including design (customer journeys, omni-channel flows, integrations, security/RBAC, augmentation, quality, analytics and reporting), build, SAT/UAT and tailored training across roles for rapid enablement.

From day one of onboarding, our teams focus on establishing a clear and agreed project scope, measurable outcomes, strong governance, defined responsibilities, and the right resources. We prioritise knowledge transfer, so your teams are empowered long after the project is complete.

Users will also have access to the Halo library of guides and documentation anytime to get started with learning and expanding their platform knowledge, as well as the Halo support team being available throughout the process.

The following is an example of a typical implementation and deployment plan:

Initial Planning and Preparation

- **Define Objectives:** Identify the goals and objectives for the implementation of HaloCRM. Confirm timelines and relevant resources to make the project a success.
- **Stakeholder Engagement:** Engage key stakeholders and form a project team.
- **Infrastructure Assessment:** Assess current infrastructure and plan for any necessary changes and/or transition plan to new CRM platform.
- **Requirements Gathering:** Identify branding, channels, user groups, service volumes, security (roles, permissions, MFA), data residency, compliance, and any integration needs (Contact Centre platform, SSO)

Process Identification and Solution Design

- **Process Discovery:** Identify core processes (contact flows, queues, workflows, Quality, reporting, dashboards, KPIs) and define AI use cases (virtual agent, intelligent routing, automation, augmentation, analytics). This will be carried out in workshop style approach, focusing on each process individually.
- **Solution Design:** Create detailed documentation of the solution design including AI options, architecture and integrations.
- **Risk Assessment:** Assess and mitigate for operational, technical and compliance risks.

Build and Configuration

- **Build Environment:** Configure HaloCRM environment and core modules, including customer portal, workflows, forms, templates and AI-powered services.
- **Secure Environment:** Configure users, roles, skills and permissions.

- **Integrate Environment:** Setup required integrations (Contact Centre platform, SSO) and data flows.
- **Data Migration:** If transitioning from an existing CRM platform, cleanse and prepare legacy data for migration, migrate customer, case and knowledge data.

Testing and Validation

- **Functional Testing:** Conduct testing to ensure individual components work correctly.
- **Integration Testing:** Perform integration testing to validate end-to-end process functionality.
- **Validation:** Validate workflows, SLAs, reporting and AI-driven journeys.
- **Conduct UAT:** Engage end-users to test the functionality including AI-driven configuration in a controlled environment.
- **Feedback and Refinement:** Collect feedback and make necessary adjustments.

Training and Knowledge Transfer

- **Training:** Deliver role-based training for agents, supervisors and administrators
- **Knowledge Transfer:** Best practice working sessions, provide operational documentation and support processes
- **Pilot:** Run pilot or phased rollout for early users
- **Change Enablement:** Support organisational change and adoption of new HaloCRM platform

Go-Live and Stabilisation

- **Go-Live:** Execute go-live and transition to live operations.
- **Monitor:** Continuously monitor the performance, service levels and AI accuracy.
- **Post-Go-Live Support:** Provide hypercare support to address any issues that arise during the initial phase.

Continuous Improvement (Ongoing)

- **Review:** Review analytics and customer feedback regularly
- **Expand:** Further develop workflows, automation and AI use cases as service matures.
- **Optimisation:** Optimise workflows and configuration post-launch and identify opportunities for further enhancement and service evolution.

Service Management

ArvatoConnect provide a standard support level, 07:00-22:00 7 days a week. A premium support level with extended hours can be discussed on a client-by-client basis.

Service Levels

Class	Response Time	Resolution Time
Priority 1 - Critical	Response within 30 minutes	Resolution target 4 hours
Priority 2 - High	Response within 1 hour	Resolution target 8 hours
Priority 3 - Medium	Response within 4 hours	Resolution target 3 days
Priority 4 - Low	Response within 8 hours	Resolution target 8 days
Priority 5 - Standard	Response within 16 hours	Resolution Target as agreed in response

Information Security

ArvatoConnect delivers services in a way that aligns fully with UK public-sector security, governance and regulatory expectations. Our security model prioritises the protection, confidentiality and integrity of government data, ensuring compliance with all relevant national frameworks, including those required by central government departments, local authorities, and arms-length bodies.

Certifications and Assurance

Our services operate within a robust Information Security Management System that is certified to ISO/IEC 27001:2022, providing a formally audited framework for managing and protecting sensitive public-sector information. ArvatoConnect also holds:

- Cyber Essentials & Cyber Essentials Plus — required for handling UK public-sector data securely.
- PCI DSS – applied only where needed (payments) but governed under the same security controls across our operations.
- ISO 9001:2015 – ensuring consistent quality processes across all engagements.
- TISAX and BSI Customer Service Kitemark (applied where relevant), with the same underlying security governance applied across all client work.
- We also undergo regular IT Health Checks (ITHCs) and vulnerability scanning, supporting wider UK government expectations for annual assurance activity.
- We are regulated by the FCA for our work with an automotive financial Services client, however, where we are certified or regulated in one client area only, we always apply the same principles across our entire business.

We are progressing additional public-sector-relevant certifications including:

- ISO 14001:2015 - Environmental Management
- BSI Kitemark for Inclusive Service
- ISO/IEC 27017:2015 - Information Technology - Cloud Security
- ISO/IEC 42001:2023 - Information Technology - Artificial Intelligence

Security Controls for Public Sector Data

Our security model ensures that our solutions meet the stringent requirements typically set by government buyers, including:

- Strong access control and identity management aligned to least-privilege principles
- Full activity audit trails
- Segregation of development, test and production environments
- UK-based service delivery and data handling (unless otherwise approved by the buyer)
- Alignment with the security requirements set out in the Government Security Classifications (GSC)
- Compliance with relevant departmental and local-authority security policies
- Annual policy reviews and threat-monitoring via our Security Operations Centre (SOC)

Public-Sector-Aligned Incident & Risk Management

ArvatoConnect maintains mature incident-response processes that support public-sector transparency obligations, including early reporting, impact assessment and documented response procedures. All incidents are managed through our ISO 27001-aligned ISMS, and our teams conduct audits, spot checks, and mandatory annual staff training to maintain ongoing security maturity.

Business Continuity

ArvatoConnect's Business Continuity Management System (BCMS) complies with ISO 22301 and is aligned with public-sector continuity expectations, ensuring government services remain operational during disruptions. Each operational site, function and client account has a dedicated Business Continuity Plan (BCP) and Incident Response Plan (IRP), designed to support the specific regulatory and operational needs of public-sector bodies. This includes:

- Validated recovery procedures
- Annual testing
- Multi-site redundancy
- Cross-trained personnel
- Secure access to systems and knowledge bases
- Communications plans suited to public-sector escalation structures

These measures collectively ensure that our Intelligent Automation services remain secure, resilient and fully compliant with the standards expected across central government, local authorities, and regulated public-sector organisations.

Service Pricing

The Skills for the Information Age (SFIA) Definitions and rate card will be used to determine the project cost based on its agreed scope. The SFIA Definitions and rate card document is available within the pricing document section.

Further Information

For further information about this or any of our G-Cloud services, please contact us as follows:

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