

iService Solutions delivering

HaloITSM

G-Cloud Service Definition

HALOITSM

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About iService Solutions

iService Solutions (formerly CRMworks Limited) was founded in 2001 by David Knowles, who formerly led regional and global professional services teams for ITSM vendors such as Bendata, GoldMine Software Corporation and FrontRange Solutions. Our primary focus has always been on global best-of-breed, configurable ITSM (IT Service Management), ESM (Enterprise Service Management), and customer service platforms, together with associated technology including asset discovery and telephony solutions.

Since 2001, we have delivered hundreds of successful projects for both our direct customers, and also a large number of projects outsourced from software vendors. In 2021, we were approached by Halo Service Solutions, and subsequently signed as the first global HaloITSM reseller. Since then, we have worked closely with Halo to both migrate our legacy customers to the HaloITSM platform and to win a large number of new customers, both in the public and private sectors. Our public sector customers include numerous NHS trusts, local authorities, and central government entities such as British Forces Post Office, the Ministry of Justice, and the UK Debt Management Office (an executive agency of HM Treasury).

Our team of expert consultants have experience of deploying hundreds of HaloITSM solutions, both for our own customers, and as a result of Halo outsourcing scores of projects to us over the last 4 years. Our consultants have ITIL certification, and also hold the highest possible level of Halo certification, not only for HaloITSM, but also for Halo's other offerings (HaloCRM and HaloPSA). We also have consultants that hold Security Check (SC) and Non-Police Personnel Vetting (NPPV3) clearances.

Our policy is to build long-term trusted relationships with our customers, and this is underpinned by our ethos of always acting honestly, transparently and honourably in all our customer interactions. As a result, we are honoured have a large number of customers who have been with us for over 20 years, and who have moved through a number of products with us during this time as technology trends and product capabilities have advanced.

iService Solutions are headquartered in Cirencester, UK, with a satellite office in the Netherlands to support our Netherlands, Belgian, and Luxembourg customers.

About Halo Service Solutions

Halo (Halo Service Solutions) have been providing best in class service management software for over 25 years. The system has been carefully developed by Halo's expert in-house team, blending ITIL best practises and feedback from their global customer base together into a feature complete solution that over 100,000 depend on.

HaloITSM is an entirely global company, with a global mindset, headquartered in the UK. They offer a 24-hour support system due to our worldwide time-zone coverage, operating from Suffolk (UK), Washington State (USA) Florida (USA), Dubai (UAE) and Melbourne (Australia). Their customers are from over 50 different countries and use HaloITSM in a variety of languages, including English, Spanish, French, Italian, Welsh and more.

The platform itself is built in the REACT framework, originally developed by Facebook, creating a lightning-fast interface that can keep up with your technicians and that end-users love to use. It also allows us to develop quickly, facilitating quick reactions to changes and innovations in the IT and Enterprise Service Management space. All clients have the opportunity to feed into the HaloITSM roadmap and see solutions to their real-life process issues realised in our low/no code interface.

The HaloITSM product offering is one of the few on the market that rejects the modularisation of software. They do not believe in paywalls, or endless add-ons to achieve your dream service management solution. Instead, simply purchase the number of licenses you require, and gain access to the entire suite of functionality available in HaloITSM.

Halo believe HaloITSM is unmatched in the service management space for configurability, flexibility, speed and customer relations, and we really appreciate your interest in our system.

ITSM Experience

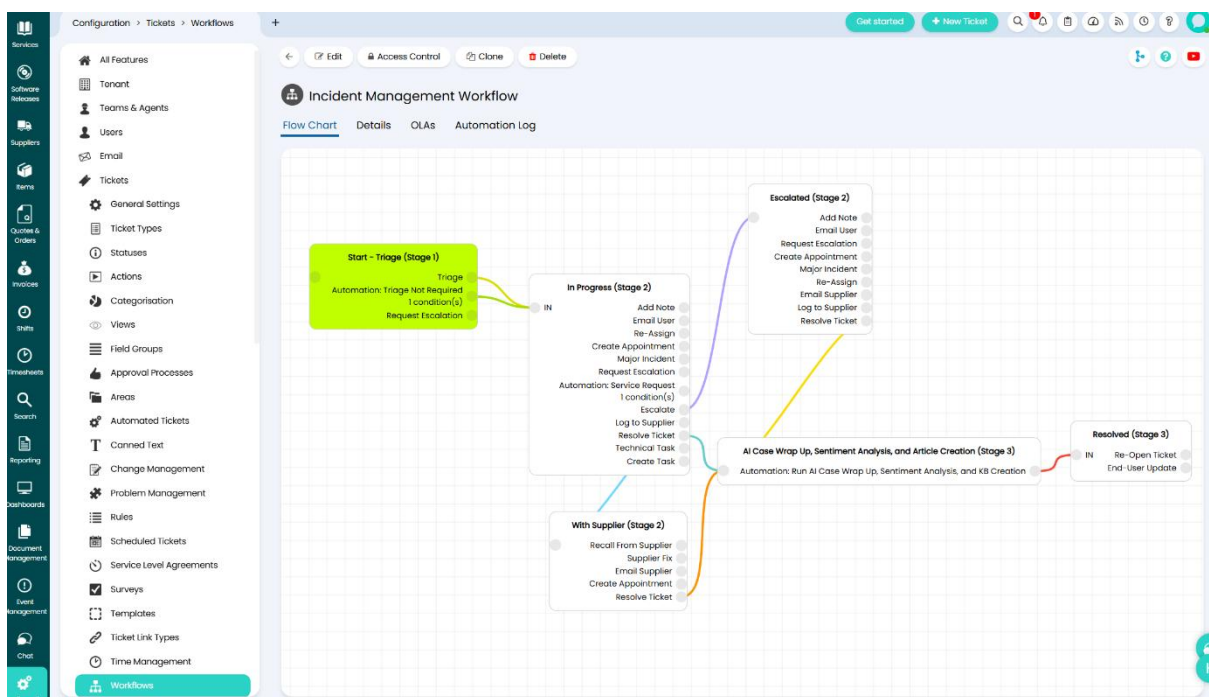
Halo are committed to delivering top-tier service management solutions tailored to meet the unique needs of their diverse clientele. Their experience across diverse sectors underscores their ability to provide high-quality service and support, further information can be found here: <https://usehalo.com/haloitsm/sectors>.

HaloITSM has a wide customer base, with extensive experience implementing the platform for large, enterprise organisations. This has included thousands of implementations in both the private sector and public sector. They understand the high volumes of work enterprise organisations deal with, and the importance of interdepartmental communication through a single centralised IT system. Many successful implementations of HaloITSM across a wide variety of sectors can be seen highlighted in our case studies which are available via the following link: <https://usehalo.com/hub>.

Strategic Priorities

Workflow Management

HaloITSM delivers a modern workflow management platform that replaces legacy ticketing systems with fully interconnected, cross departmental processes suitable for IT, HR and Facilities operations as well as other departments. Its low code workflow designer allows teams to build automated, multi-step workflows with approvals, routing rules, conditional logic and integrations, ensuring requests move smoothly between departments without manual intervention. Knowledge management is embedded directly into each workflow so technicians and operational teams are guided by relevant articles, procedures and troubleshooting steps at the moment they need them. All process areas share the same underlying data model, allowing incidents, investigations, maintenance tasks and operational requests to link together for complete visibility and coordinated execution. This provides customers with a unified environment where workflows become consistent, automated and scalable across the organisation, improving efficiency, accuracy and service quality.



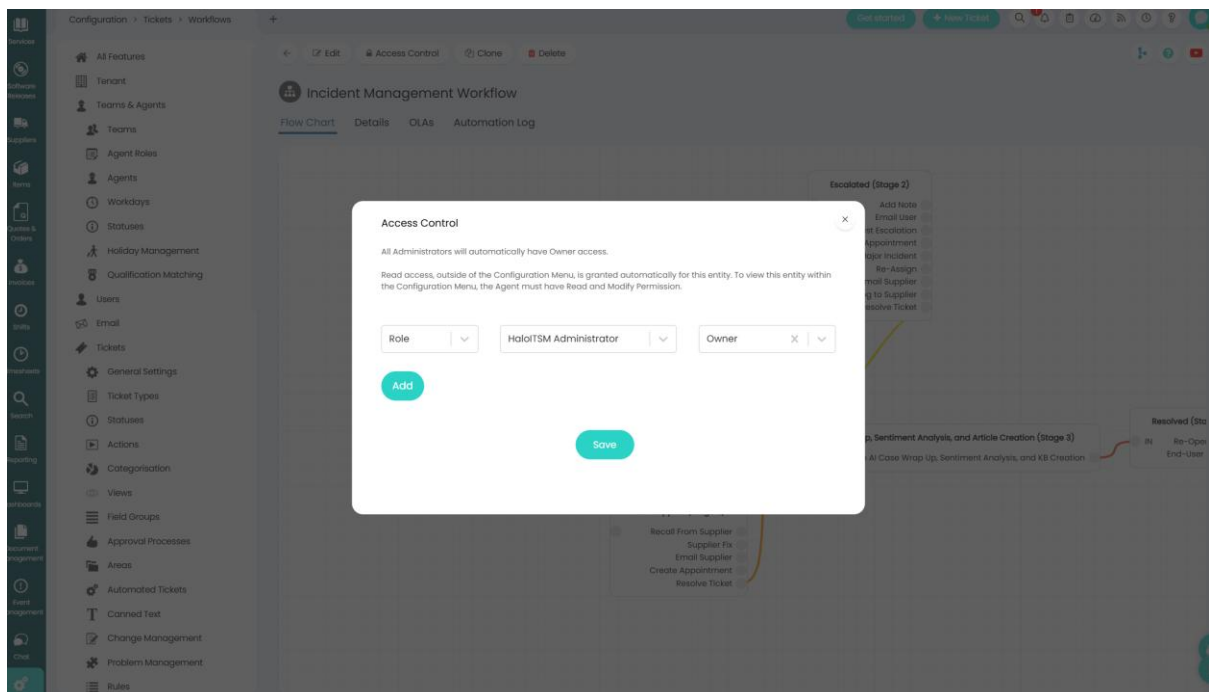
Integration in Strategic Plans

HaloITSM aligns directly with organisation's digital ticketing modernisation goals by providing a unified platform that standardises and automates processes across operations. Halo's low code workflow engine allows both teams to operate within the same consistent framework while still tailoring processes to their unique needs, helping improve SLA performance through automated routing, prioritization, escalations and real time monitoring. The platform enables end to end visibility across all ticket types, ensuring that store level issues, IT service requests and operational tasks are managed with the

same level of governance and efficiency. With a shared service catalogue, integrated knowledge base and cross functional dashboards, teams can harmonize procedures, reduce resolution times and support evolving business requirements without relying on disconnected legacy systems. HaloITSM's extensible design also ensures that these processes can scale and adapt as your operational landscape continues to grow and change.

Cybersecurity & Governance

HaloITSM supports a companies broader security and governance objectives by delivering a platform built on strong access controls, encrypted data handling and comprehensive auditing across all workflows and user actions. Centralised dashboards provide real time visibility into security related metrics, SLA adherence, operational performance and compliance indicators, helping leadership monitor risk and enforce governance standards. Vulnerability management processes can be embedded directly into workflows, allowing teams to log, track, prioritize and remediate security issues with full traceability and automated escalations. Third party risk oversight is strengthened through supplier and contract management modules that track vendor performance, compliance status, review cycles and associated risks. These capabilities work together to ensure that operational workflows not only meet service goals but also reinforce security posture and governance discipline across the organisation.

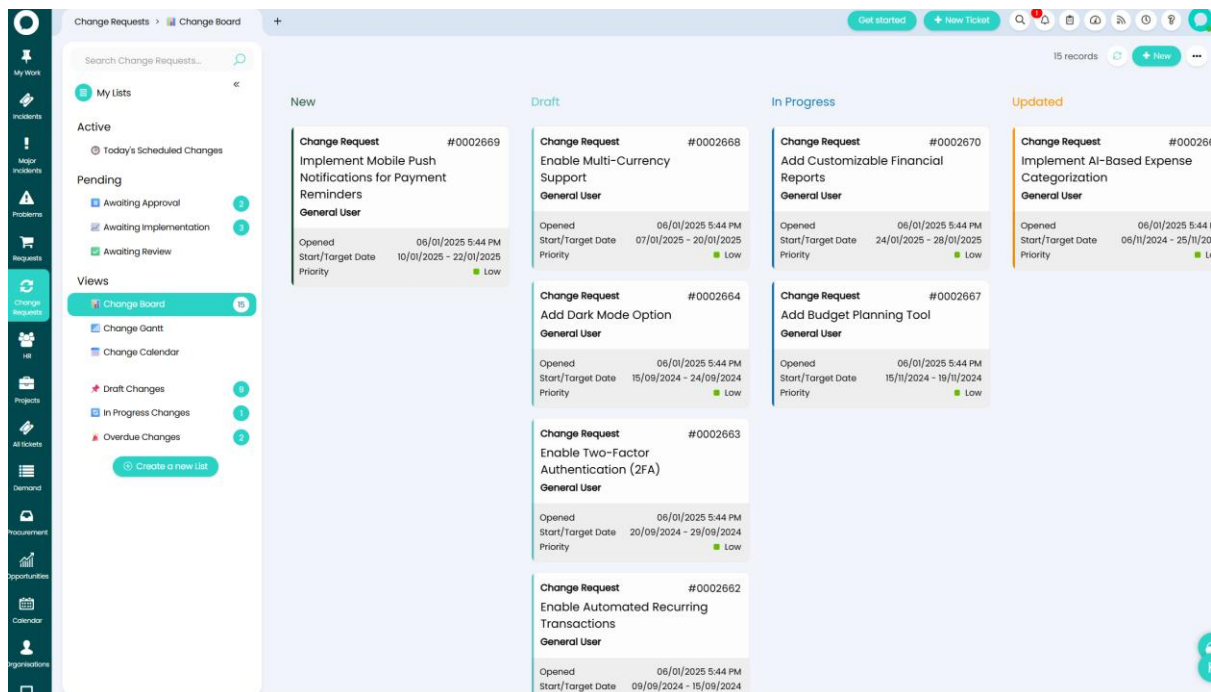


IT Service Management (ITSM)

Incident Management: HaloITSM provides a fully automated incident management process that helps teams track, prioritise and resolve issues quickly using intelligent routing, SLA timers, escalations and real time dashboards. Incidents can be raised through the self-service portal, email, phone, chat or integrations, and technicians benefit from embedded knowledge suggestions and linked asset data to accelerate troubleshooting. This ensures consistent handling of incidents while improving response and resolution times.

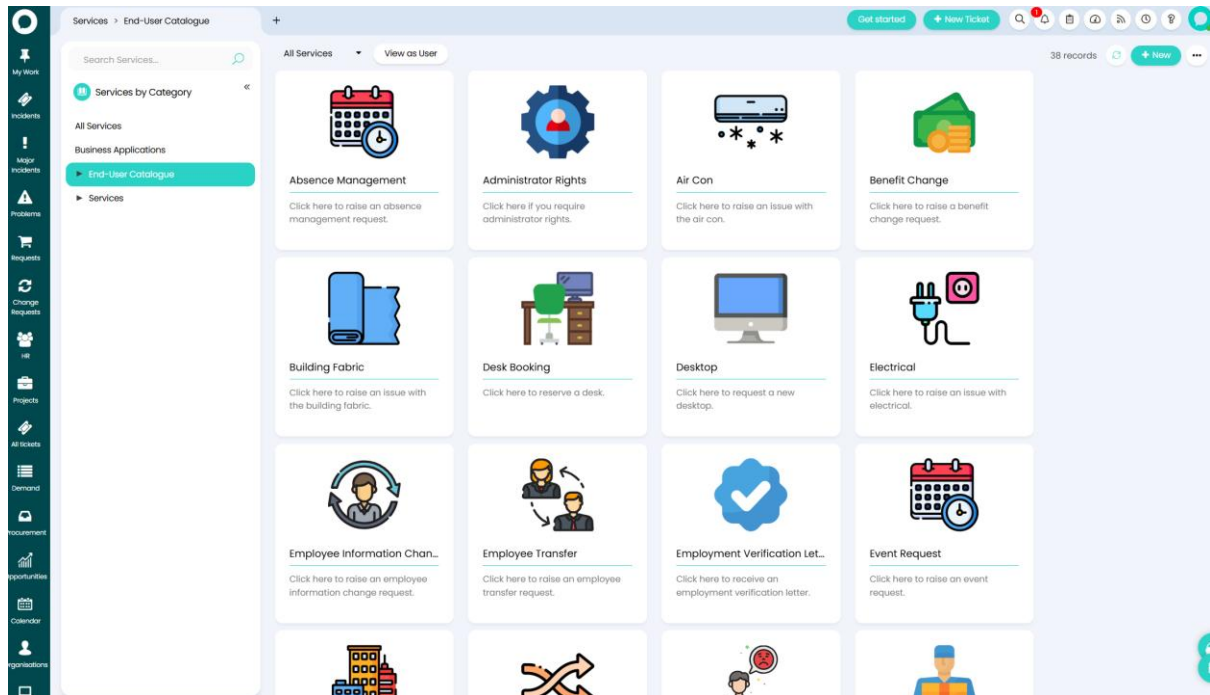
Problem Management: The platform supports a complete problem management lifecycle by linking related incidents, identifying patterns and enabling structured root cause analysis. Problems can be tracked through investigation, diagnosis and permanent fix, with known error records and workarounds published directly into the knowledge base. This helps Customers reduce recurring issues, improve operational stability and maintain better control over systemic problems across the organisation.

Change Management: HaloITSM provides a controlled, risk aware change management process with approval workflows, impact analysis, scheduling, automated validations and comprehensive audit trails. Changes can be categorised, templated and routed according to risk level, ensuring consistent governance while minimising service disruption. Real time dashboards and forward schedules of change help teams plan effectively and maintain visibility.

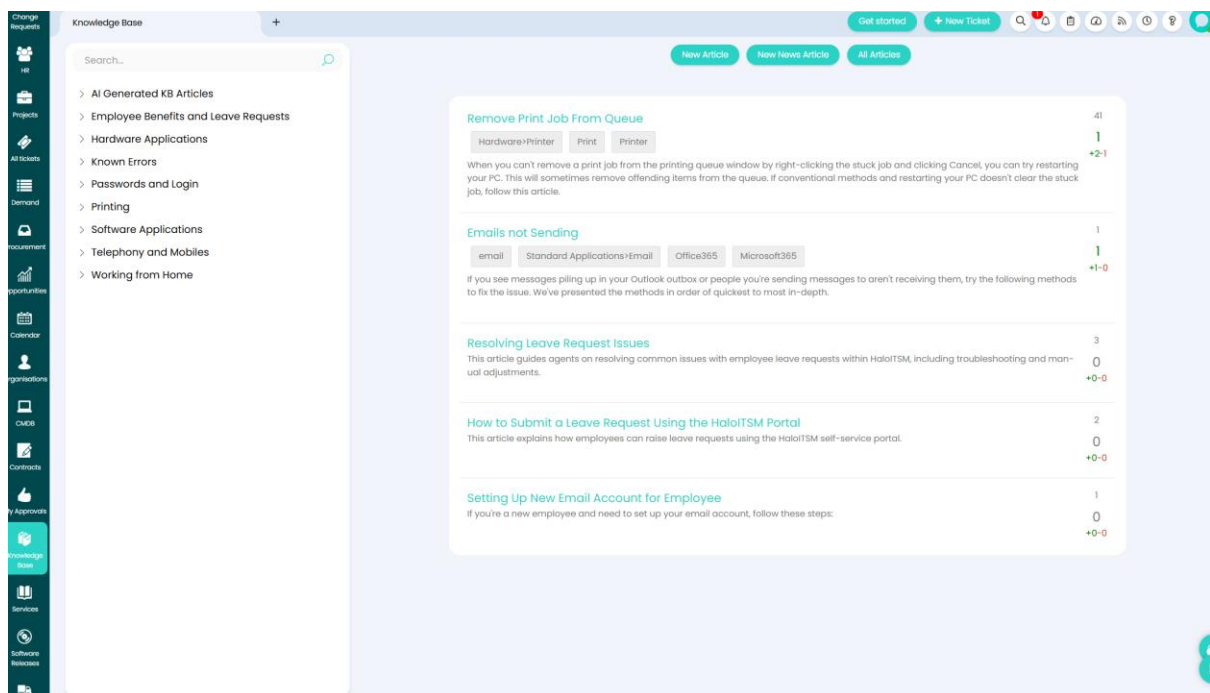


Service Catalogue: The platform includes a configurable service catalogue and self-service portal where users can request IT services, equipment, access and operational support through an intuitive, guided interface. Each catalogue item can be linked to automated workflows, approvals and knowledge articles, enabling faster fulfilment and

reducing manual effort. This creates a consistent experience for users while improving request transparency and efficiency.



Knowledge Management: HaloITSM provides a centralised knowledge base that surfaces articles, procedures and troubleshooting guides directly within incident, request and problem workflows. Articles can be version controlled, reviewed regularly, linked to known errors and published for both agents and end users. By embedding knowledge into every process, the platform improves first contact resolution, shortens training cycles and ensures consistent service delivery across all operational teams.



Workflow Automation

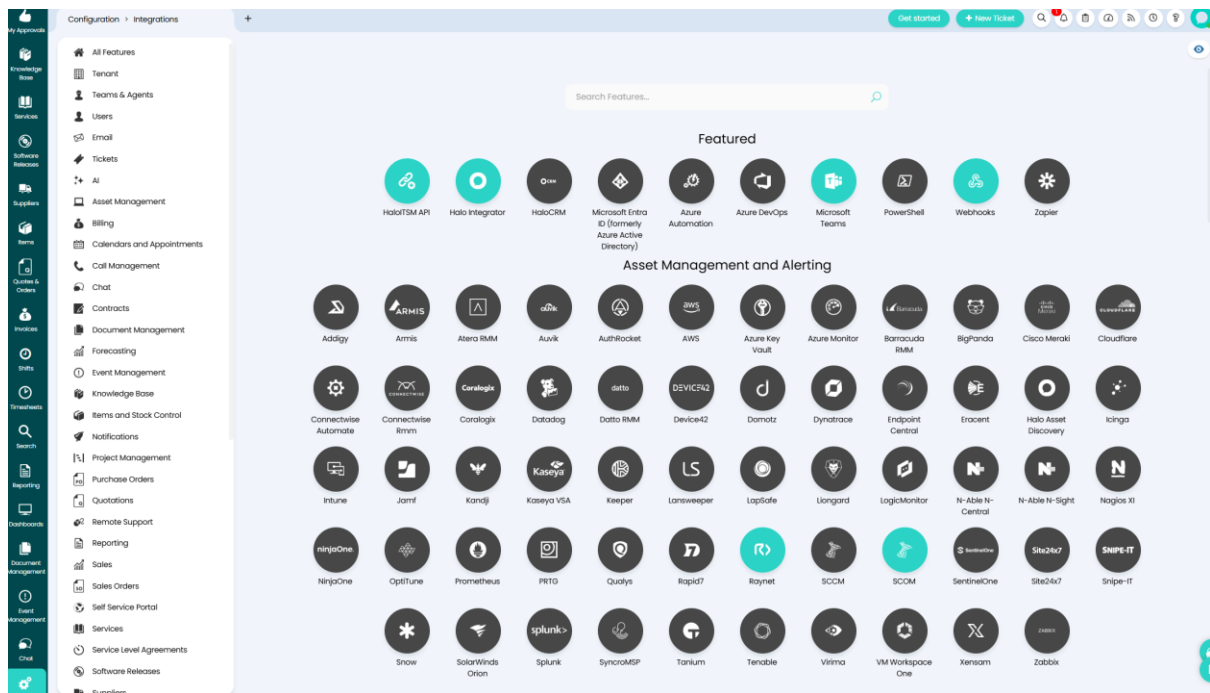
HaloITSM provides a robust automation engine that allows organisations to streamline repetitive tasks and standardise processes across IT, HR, Facilities and other operational teams. Automated workflows can manage routing, approvals, notifications, escalations, record updates, integrations and multi-step processes without requiring manual intervention, helping reduce workload, eliminate human error and improve consistency. These automations also allow departments to operate collaboratively, enabling cross functional processes such as onboarding, equipment provisioning, access management or store incident responses to flow smoothly between teams.

Workflows are configured using an intuitive drag and drop designer that requires no coding, enabling rapid creation, modification and scaling of processes as business needs evolve. Administrators and process owners can build and adjust workflows directly, using conditional logic, branching paths and integrated knowledge suggestions to design sophisticated end to end automation.

Integration Hub

HaloITSM includes a powerful integration hub that enables seamless connectivity with third party applications such as Microsoft Teams, Slack, Jira, Azure AD, Intune and many other enterprise platforms. This allows Customers to unify communication, ticketing, monitoring and operational workflows, ensuring data and activities flow smoothly between systems without manual re-entry. The platform supports bidirectional communication patterns so that updates made in external tools can automatically create or update records in HaloITSM, helping maintain accuracy and consistency across all environments.

With more than 250 pre-built connectors and an extensive Open RESTAPI framework for custom integrations and integration runbooks, HaloITSM provides real time data syncing and event driven triggers that ensure information is always up to date. Integrations can be configured through low code methods, allowing teams to quickly deploy, modify or extend connections as operational needs evolve.



AI & Virtual Agent

HaloITSM delivers advanced artificial intelligence (AI) capabilities designed to transform traditional service management operations, enabling faster responses, smarter insights, and improved user experiences across the service lifecycle. AI features are embedded directly into the platform, supporting both self-service and agent workflows without the need for separate modules or complex integrations. This integrated intelligence expands automation, enhances decision-making, and accelerates outcomes for service teams and end users alike.

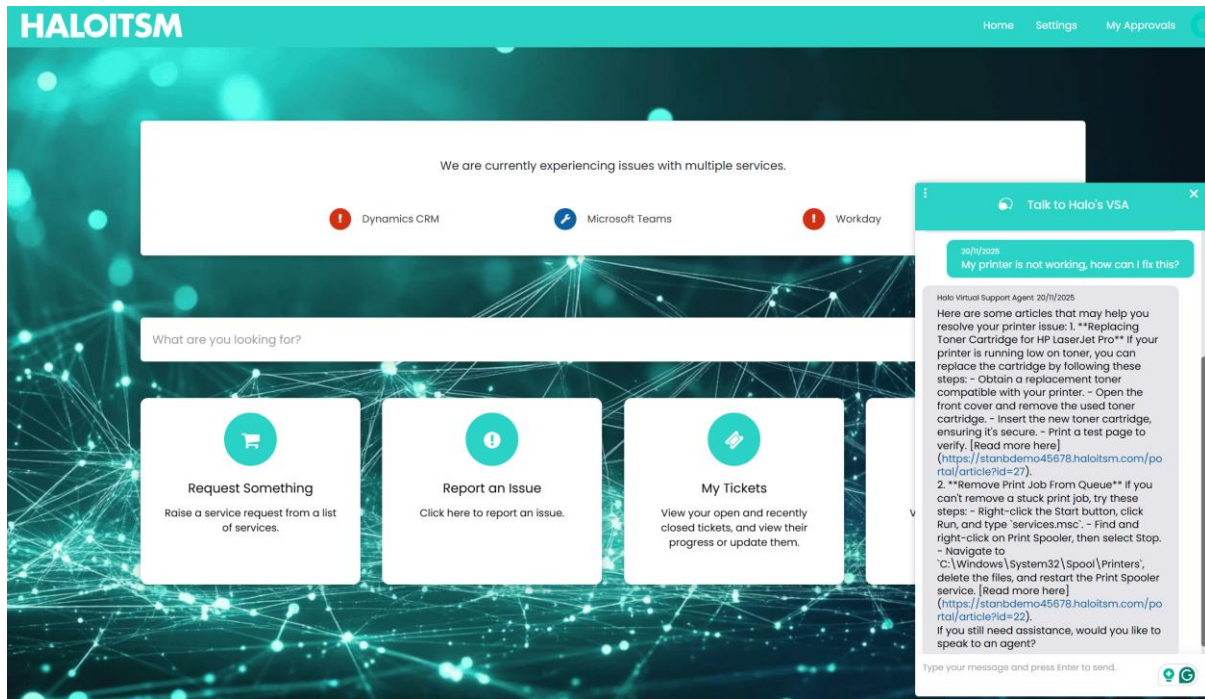
Intelligent Virtual Agent & Conversational Support

At the core of HaloITSM's AI suite is the Virtual Agent, an AI-powered conversational assistant that interacts with users using natural language understanding. The Virtual Agent can:

- Automate routine interactions: Respond to common service requests and frequently asked questions on demand.
- Capture structured information: Gather key details required to process tickets or service requests without technician involvement.
- Guide self-help and troubleshooting: Lead users through contextual problem resolution steps before tickets are raised.
- Seamlessly escalate: When necessary, escalate interactions to human agents with the full conversation history maintained so there is no loss of context.

- Multi-channel access: Support conversational engagement via web chat, mobile portal, and integrated platforms such as Microsoft Teams and Slack.
- Context-aware search: Use intelligent search techniques so users receive accurate, relevant results based on service descriptions and knowledge content.

This capability dramatically improves first-contact resolution rates and reduces the volume of routine tickets handled by service teams, freeing expert staff to focus on higher-value or complex work while increasing user satisfaction.



AI-Driven Ticketing & Automation

HaloITSM's AI extends into the core ticket management experience with features that streamline intake and processing:

- Auto-triage and classification: AI evaluates incoming requests, considering urgency, impact, sentiment, and historical context, to determine priority, appropriate categorisation, and first-line routing.
- Smart suggestions: As tickets progress, causal similarity and pattern recognition enable the system to suggest likely resolutions based on prior cases, helping agents resolve issues faster.
- Automated knowledge creation: Once issues are resolved, AI can draft knowledge articles using extracted structured insight and tagging to empower future queries.
- AI-powered summarisation: Long ticket threads can be condensed into clear summaries with key facts and next steps so teams spend less time reviewing past interactions.

These capabilities reduce manual workload for service teams, accelerate throughput, and ensure that even high-volume, repetitive inquiries are handled consistently and efficiently.

AI Analytics, Insights & Reporting

HaloiTSM harnesses AI for advanced analytics to convert operational data into actionable insights. Built-in reporting uses intelligent analysis to:

- Highlight trends: Identify emerging patterns across incidents, problems, and service requests.
- Improve decisions: Surface key performance indicators and anomalies that can inform capacity planning, skill allocation, and service improvements.
- Support service optimisation: Provide data-driven insights that help IT and support leaders prioritise strategic initiatives and address bottlenecks proactively.

This intelligence supports both operational excellence and executive oversight by enhancing visibility over service performance and user behaviour.

AI-Assisted Change Management

HaloiTSM also embeds AI within change processes to assist with risk evaluation and execution planning:

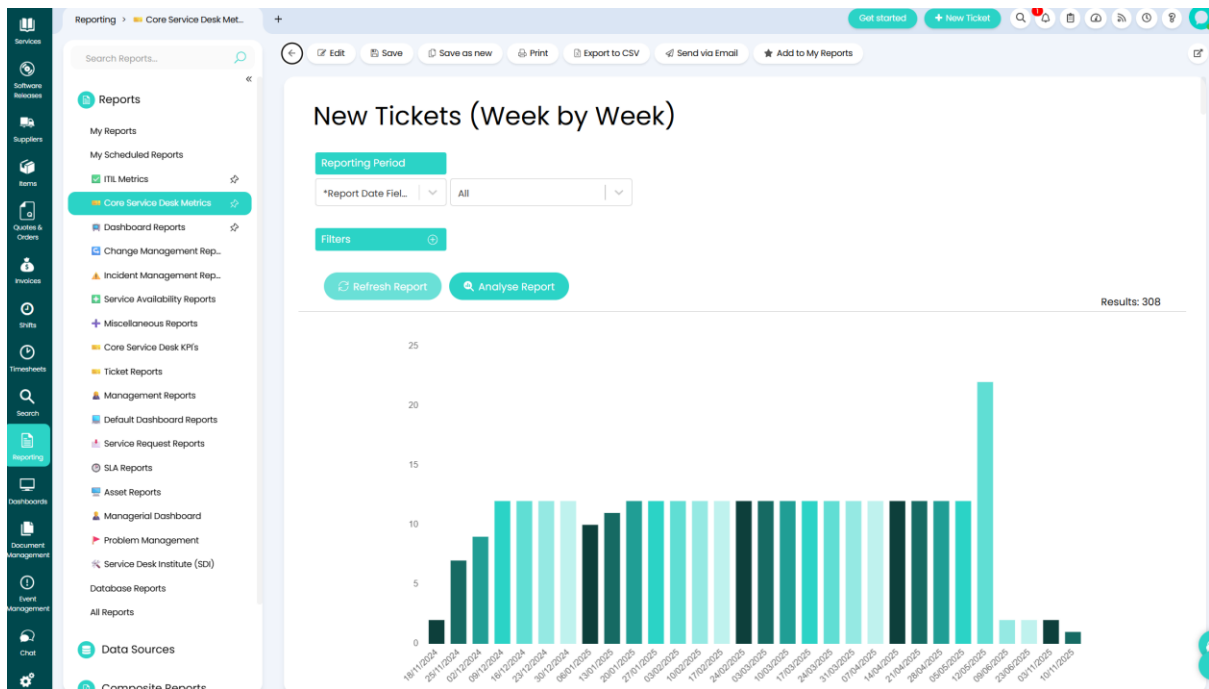
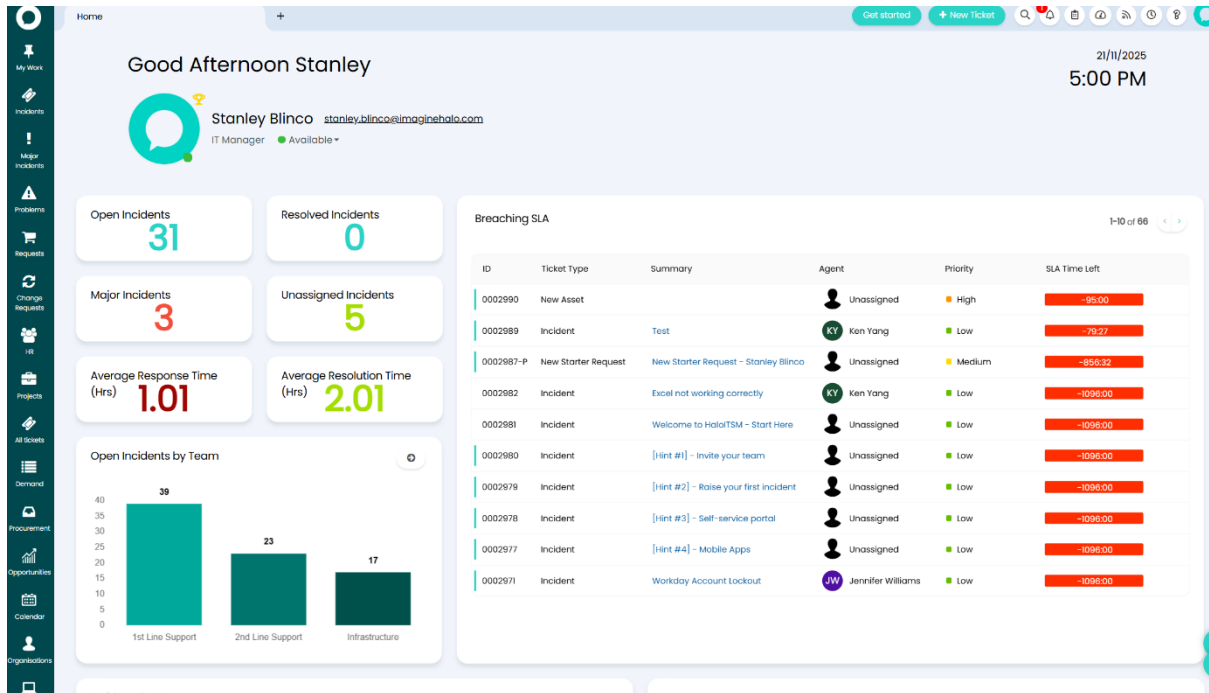
- Change risk analysis: The system can assess planned changes using historical outcomes and contextual data to identify potential risk hotspots.
- Dependency identification: CMDB-linked analysis enables the AI to surface configuration item relationships and dependencies that might impact change execution.

By using AI to inform change decisions, organisations can strengthen control, reduce rollback events, and achieve more predictable outcomes

Performance Analytics

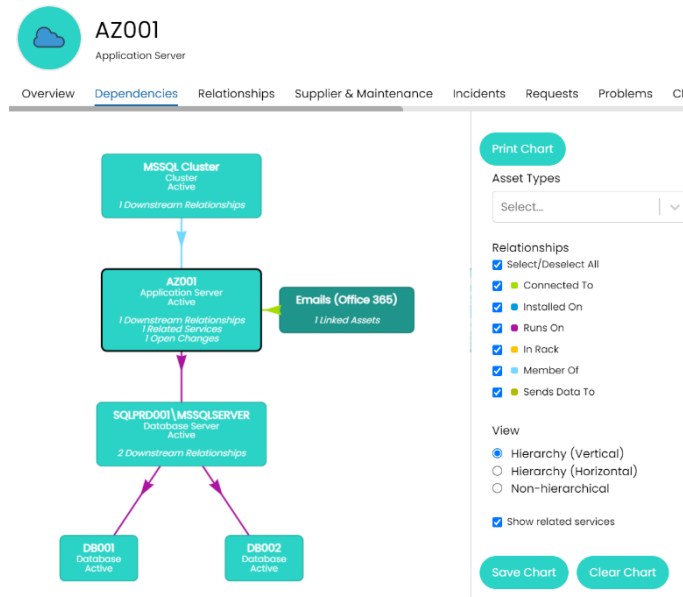
HaloiTSM provides real time dashboards and KPI tracking that gives customers full visibility into service performance. Dashboards can display SLA compliance, ticket volumes, backlog trends, technician workload, change success rates, asset performance and security related metrics, all updated live as work progresses. These views can be tailored for executives, managers or operational teams, ensuring each stakeholder has immediate access to the insights most relevant to their responsibilities. With automated alerts and threshold based notifications, teams can react quickly when service levels or operational targets are at risk. The platform also offers data driven analytics that help identify emerging patterns, recurring issues and opportunities for process improvement.

Historical trends, root cause indicators, department level performance and cross functional workflow bottlenecks can all be analysed to support proactive decision making. These insights enable to refine processes, allocate resources more effectively and anticipate operational challenges before they impact stores or corporate teams.



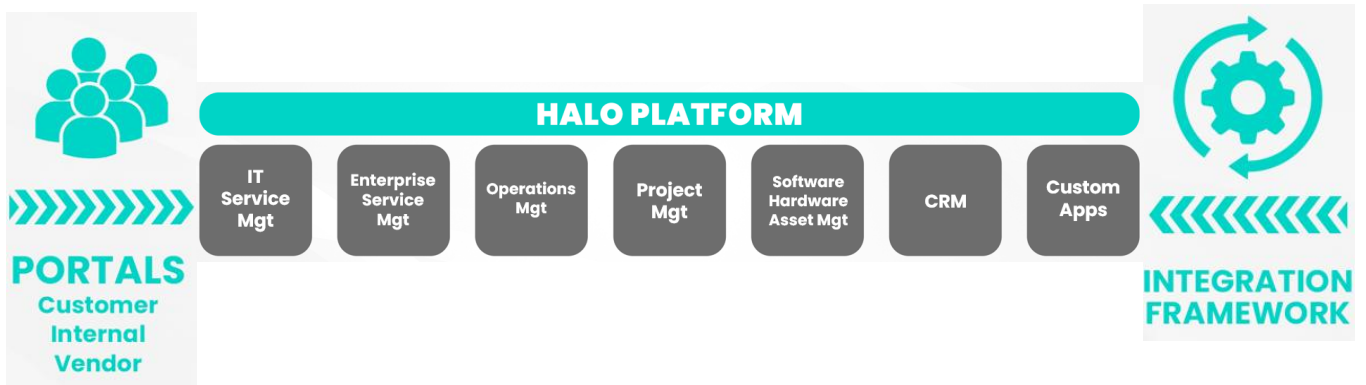
CMDB

The HaloITSM CMDB allows your organisation to track end-user assets, software, configuration items, facilities and building assets and any resource that can be booked by users (such as meeting rooms or desks). It is important to note that this is wholly included in the HaloITSM license cost and is entirely unlimited in terms of how many records you track.



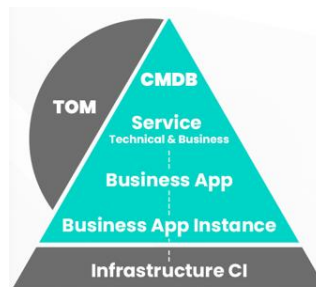
In terms of tracking configuration items, HaloITSM lets you track unlimited CI's and create relationships between them and also related services to make a visual, colour coded dependency map. This function allows you to track upstream and downstream dependencies between records, facilitating more intelligent change control. Whether this is analysing risk effectively before completing a change by looking at how a change will impact other CIs or applications, or analysing the breadth of a major incident affecting a CI and it's downstream related CIs. Each CI also has a change audit history against it, allowing you to see a granular record of any alterations made to it. This is populated automatically.

Service Automation Framework



Halo SDM (Service Data Model)

- ❖ Best practice CMDB class model.
- ❖ Focuses on services that own and consume business applications which are deployed and connected to infrastructure.
- ❖ This class data are intrinsic to all ITSM processes.

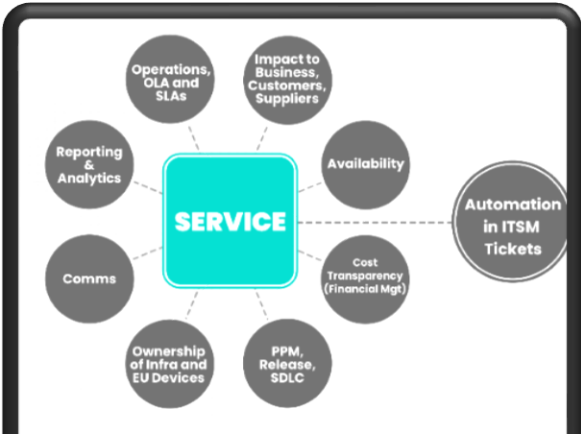


Halo TOM (Target Operating Model)

- ❖ Best practice RACI model for ownership, support and delivery of services.
- ❖ Enables federated maintenance of CMDB data (the quality and coverage of which is critical).
- ❖ Drives process automation (assignment, escalation, approval, review, notification, etc).

Benefits of SDM

- Establishes a standardised and consistent set of terms and definitions across all HaloITSM products.
- Enables service reporting, cost transparency, and offers prescriptive guidelines for service modelling within the CMDB.
- Provides a blueprint to map various types of IT services to the business applications and infrastructure they are connected to and running on.
- Adopting the SDM framework ensures the full benefits of the platform while future-proofing it.
- This model has been successfully deployed in many large enterprise .
- Focuses on elements that bring immediate business value while also outlining a roadmap for future maturity.



Process	Feature
TOM	Process roles and responsibilities for the service.
Incident and Problem	Categories, assignment rules, escalation rules, notification, resolution and cause codes, impact, SLM.
Major Incident	Categories, ownership, mobilisation of rapid response teams, communications (to subscribers), resolution and cause codes, impact, service health.
Change	Categories, risk determination, assignment rules, approval/review rules, closure codes, break glass.
Request	Catalogue mgt, assignment rules, approval rules.
Knowledge	Knowledge lifecycle ownership.
Configuration	Federated configuration management by the people that understand the service.

IT Operatio

HalolTSM sup **Reporting** Key operating metric aligned to services such as performance, availability, capacity data. oring and event management through integrations with leading monitoring tools, allowing events to flow directly into the platform for automated correlation, ticket creation and intelligent routing. This ensures operational teams can respond quickly to performance issues, store outages or infrastructure alerts before they escalate. Event data can trigger workflows, escalate based on severity and link directly to related assets or changes, creating full visibility across the operational lifecycle.

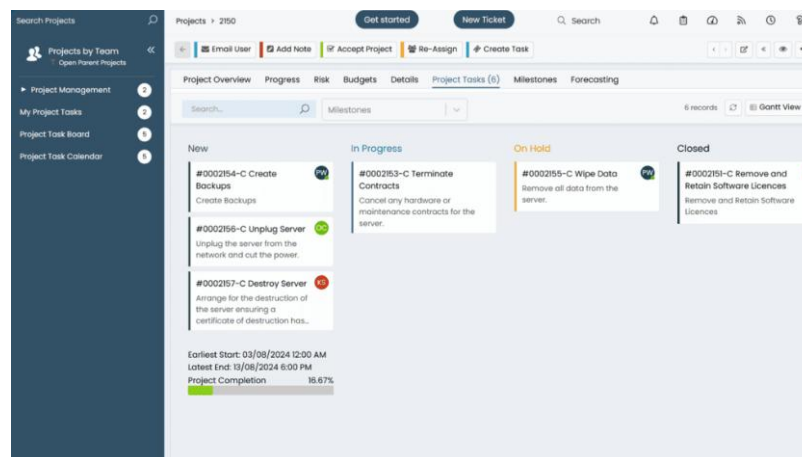
The platform includes a comprehensive CMDB that tracks assets, relationships, dependencies and configuration details across stores, corporate environments and cloud services. This provides a clear understanding of how systems are interconnected, enabling accurate impact analysis, improved change planning and better control of operational risk. Cloud resource management is supported by integrating cloud platforms such as Azure and AWS, allowing HalolTSM to surface configuration data, performance metrics and usage information. Combined, these capabilities provide organisations with a

unified operational backbone that strengthens monitoring, visibility and control across the entire technology landscape.



Project Management

HaloITSM includes integrated project management functionality designed to help organisations plan, execute, monitor, and complete projects efficiently within the same unified service management platform. Rather than relying on separate tools, Halo centralises project planning and execution alongside core ITSM processes, improving visibility, collaboration, and alignment across teams.

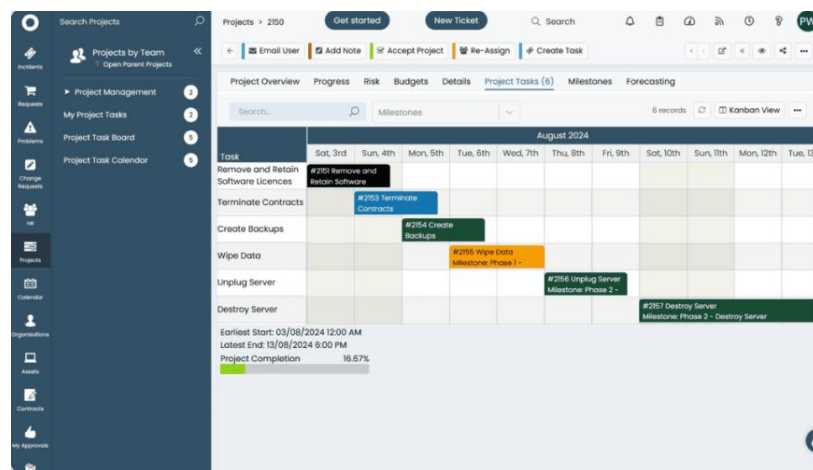


The project management capabilities provide a 360-degree view of all initiatives by centralising tasks, timelines, resources, and updates in a single workspace. Project managers and team members can monitor milestones, deadlines, and deliverables through intuitive dashboards that update in real time, enabling clear visibility into

progress and potential bottlenecks. This transparency supports better decision-making and ensures that work is tracking against agreed objectives.

Halo's project management tools also allow effective resource allocation and workload management, helping teams balance availability, assignments, and budget considerations to keep projects on schedule. By bringing stakeholders together in a common platform, the solution encourages seamless collaboration, including communication threads, file sharing, and status updates that are visible to all relevant contributors.

Designed for flexibility, Halo's project management supports a variety of methodologies, whether traditional, agile, or hybrid, and can be tailored to organisational processes and reporting needs. For organisations overseeing multiple concurrent initiatives, portfolio-level views offer insights into resource commitments and strategic priorities, supporting informed planning and oversight.



By integrating project and service management, HaloITSM empowers teams to deliver successful outcomes on time and within scope, while maintaining a single source of truth for work execution and organisational priorities.

Governance, Risk and Compliance (GRC)

HaloITSM provides strong governance, risk and compliance capabilities by allowing organisations to embed risk controls, approval steps and audit requirements directly into their operational workflows. Risk registers, assessment templates and mitigation plans can be managed within the platform, enabling teams to track risks through their lifecycle and ensure ownership, accountability and timely remediation. All actions are logged in detailed audit trails, supporting both internal governance standards and external regulatory obligations. Compliance processes can be reinforced through automated workflows that enforce mandatory checks, route high risk activities for additional oversight and maintain full traceability across incidents, changes, suppliers and operational tasks.

With integrated dashboards and reporting, companies can monitor compliance status, track emerging risks and demonstrate adherence to regulatory frameworks as part of everyday operations.

Security

Security, data protection, and compliance are foundational to HaloITSM's design, development, and delivery. The platform is built around robust information security policies, with a strong focus on confidentiality, integrity, and availability of customer data throughout its lifecycle. Halo's approach aligns with industry best practices and recognised international standards to ensure that the service can be confidently adopted across both public and private sector environments with demanding security requirements.

Security Governance & Policy

Halo Service Solutions maintains formal, documented information security management processes that are continuously reviewed and improved. Security governance is embedded within corporate risk management, supported by executive leadership and regular internal training programmes to ensure awareness and accountability across the organisation. Halo's security policies adopt a risk-based approach and emphasise continual improvement, monitoring, and evaluation of security controls at least annually.

Certified Compliance & Accreditations

Halo's security programme is underpinned by the following core accreditations and certifications, demonstrating its commitment to recognised information security frameworks:

- ISO27001: An internationally recognised Information Security Management System (ISMS) standard, providing a structured framework for managing risks and protecting information assets. Halo's compliance confirms that appropriate controls are in place to safeguard data against identified threats.
- Cyber Essentials Plus: A UK Government-backed certification demonstrating robust baseline cyber hygiene controls across network security, access control, malware protection, and secure configuration.
- SOC 2 Type 2: Independent audit reporting confirming that Halo's security, availability, and confidentiality controls operate effectively over time according to the AICPA Trust Services Criteria. This level of reporting provides assurance on operational effectiveness of controls.

Together, these accreditations reflect HaloITSM's adherence to mature security practices that meet the expectations of regulated industries and enterprise environments.

Secure Hosting & Infrastructure

HaloITSM is hosted on Amazon Web Services (AWS) infrastructure, which itself complies with ISO 27001 and multiple additional certifications. AWS's global data centre footprint, including regions in Europe, the UK, and beyond, provides highly secure, resilient environments with strict physical access controls, environmental safeguards, and continuous monitoring. All Halo data resides within AWS environments, ensuring high availability and robust protection against infrastructure-level threats.

Data Protection & Cryptography

Communication between clients and the HaloITSM platform is secured using industry-standard cryptographic protocols (HTTPS/TLS), protecting data in transit. Where applicable, data at rest is encrypted to mitigate the risk of unauthorised access. Access control mechanisms, including role-based permissions and authentication integrations (e.g., SAML/SSO), ensure that only authorised individuals can access sensitive data.

Testing & Vulnerability Management

HaloITSM engages in regular security assessments, including third-party penetration testing, at a minimum, on an annual basis, to identify and remediate vulnerabilities across the platform. Findings from penetration tests and internal vulnerability scans inform ongoing improvements to secure development practices and risk mitigation strategies. A formal Vulnerability Disclosure Policy is maintained, encouraging responsible reporting and coordinated resolution of potential issues.

Incident Response & Business Continuity

Halo maintains documented incident management and response procedures aligned with ITIL practices. In the event of security incidents, issues are tracked, prioritised, and resolved through established processes to minimise impact and ensure service continuity. Regular backup and recovery testing ensures that data restoration capabilities are validated and dependable.

Roadmap and development

Since HaloITSM's beginnings, Halo have consistently taken a fresh approach to doing business and innovating our product to create the most agile workforce and product possible. Our aim is to focus on fostering innovation, encourage every member of the company to shape business direction from day one and push the boundaries of what is possible with our ever-growing product. Halo's innovative software solutions are driven in part by customer demand, with ideas from clients always being taken on board and frequently being built into the platform. Halo's roadmap of potential platform changes is always visible by heading to <https://usehalo.com/haloitsm/roadmap> where customers can keep watch on imminent releases and plans. There is also a quick link in all instances

of HaloITSM to past, present and future releases (with detailed release notes) so you can be confident of all details of a version build.

Halo release a new beta version of HaloITSM every 2 weeks and a stable version every 4 months. This fast development ensures that customers always have access to the latest features and technology at no additional cost and allows them to constantly grow and scale with the product over time.