



# Service Definition- CRM Support

# **Service Definition: CRM Support (Cloud Support lot) – GOV.UK Digital Marketplace**

## **1) Service overview**

Cantata provides vendor-independent CRM support for Microsoft Dynamics 365 Customer Engagement, Salesforce, and related CRM ecosystems. We keep services running, resolve incidents quickly, optimise performance and continuously improve adoption and value. Our model blends reactive (incident/problem) and proactive (health checks, tuning, release & adoption) services under clear SLAs, with knowledge transfer to reduce supplier reliance.

Who this is for: central and local government, regulators, health, education and NDPBs that use CRM for casework, citizen services, inspections, outreach, grants or stakeholder engagement.

## **2) Service scope**

### **1. 2.1 Operational support**

- Incident management & troubleshooting (application/configuration; triage third-party/integration issues)
- Problem management (root-cause analysis; known-error database; prevention actions)
- Service requests (user admin, role/permission changes, views, dashboards, templates)
- Minor change & configuration (forms, fields, rules, model-driven/Lightning apps, flows/automation)

### **2. 2.2 Proactive care & optimisation**

- Health checks (telemetry, audit, plug-ins/flows, API limits, storage, release readiness)
- Performance optimisation (query tuning, indexing guidance, data hygiene, right-sizing)
- Data quality (deduplication, validation, reference data management)
- Release & change management (branching, solution packaging, lower→prod pipelines, change advisory)
- Adoption support (super-user enablement, floor-walking, micro-learning, FAQs)

### **3. 2.3 Integration & data**

- Interface monitoring & remediation (ERP/finance, LOB, telephony/CTI, document mgmt, identity)
- Data fixes & small migrations (controlled corrections; governance advice for larger change)

### **4. 2.4 Reporting & insight**

- Operational MI (usage/adoption KPIs, SLA dashboards, backlog analytics)

- Business reporting enablement (views, charts, dashboards; signposting to Power BI/CRM analytics)

Out of scope by default (available separately): new module builds, major re-architecture, large data migrations, bespoke product development.

### **3) Outcomes & deliverables**

- Service continuity with SLA-backed incident resolution
- Monthly service pack: performance & capacity summary, incident/problem analysis, completed changes, risk log, recommendations
- Quarterly optimisation review: roadmap of “no-regrets” improvements and adoption actions
- Knowledge transfer assets: run-books, admin guides, known-error articles

### **4) Onboarding & offboarding**

#### **5. Onboarding (1–3 weeks typical)**

- Kick-off & scope confirmation (run-book, RACI, tooling, reporting cadence)
- Environment access (non-prod/prod, logging, source control, ticketing)
- Service transition (inherit open incidents/problems; baseline health check)
- Go-live (service acceptance, SLA start)

#### **6. Offboarding**

- Handover pack (documentation, configs, backlog, known-error articles)
- Access removal & data return; exit briefing; optional shadow support for 2–4 weeks

### **5) Service levels (example; configurable)**

P1 – Critical: response 1 hr; workaround/restore 4 hrs; resolution 1 business day

P2 – High: response 2 hrs; workaround/restore 1 business day; resolution 3 business days

P3 – Medium: response 1 business day; resolution 5 business days

P4 – Low/Request: response 2 business days; scheduled resolution window

Support hours: 09:00–17:30 UK, Mon–Fri (options: extended day, weekend cover, on-call for P1/P2). Service reporting: monthly dashboard; quarterly review. Service management: ITIL-aligned incident/problem/change with RAID maintained.

### **6) Tooling & ways of working**

- Cantata Ticketing system API

- Source control: solution packaging and promotion via dev→test→prod; agreed change windows
- Platform monitoring and support
- Documentation: knowledge base, release notes stored in your repositories

## **7) Security, privacy & accessibility**

- Operate under your security policies; least-privilege access; MFA; audit trails
- UK GDPR aligned; DPA in place; no production data used in lower environments without masking
- Accessible documentation (tagged PDFs/structured Word); inclusive communications

## **8) Dependencies & constraints**

- Named service owner and technical contact
- Timely access to environments, integration endpoints and existing documentation
- Change freezes and deployment windows agreed in advance
- Clear priority definitions and acceptance criteria for change requests

## **9) Pricing model**

- Per user per month pricing
- Time & Materials (day rates by role) or Managed Service retainers (bundled hours + SLA)
- Options for capped T&M and small change (e.g., 5/10/20-day bundles)
- T&E at cost

## **10) Ordering & invoicing**

- Purchase via G-Cloud (Cloud Support)
- Statement of Work confirms scope, SLAs, cover hours, onboarding plan, pricing
- Invoiced monthly in arrears (retainer) or on delivery (T&M/fixed-price)

## **11) Exit plan**

- Knowledge transfer → documentation handover → shadow period
- No lock-in: artefacts remain your IP; we use your tenant/tooling wherever possible

## **12) Benefits**

- Stability & resilience: predictable SLA-backed support
- Faster restoration & fewer recurrences: problem management and knowledge base
- Better performance & adoption: continuous optimisation and enablement
- Lower TCO & supplier independence: right-sized environments; knowledge transfer

### **13) Example public-sector scenarios**

- Citizen casework: maintain SLA timers, omnichannel routing, knowledge base; safe releases
- Grants/benefits: tuning for peak cycles; reliable integrations with queuing/retry patterns
- Regulatory inspections: mobile sync reliability; offline troubleshooting; field security profile optimisation

### **14) Evidence & Case Studies**

Available on request

### **15) Why Cantata**

- Independent & vendor-neutral: we recommend and support what's right for you
- CRM-only specialists across Dynamics 365, Salesforce and adjacent stacks
- Pragmatic & transparent: ITIL-aligned, data-driven improvement, clear comms

### **16) Contact**

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