



Service Definition – CRM Planning

Service Definition: CRM Planning (Roadmap Consultancy)

– GOV.UK Digital Marketplace

1. Service Overview

Cantata provides vendor-independent CRM planning (roadmap consultancy) that takes organisations from initial strategy and business case development through to a phased, costed plan for CRM improvement and implementation. The service combines stakeholder engagement, structured requirements capture, current-state technical analysis, and prioritised recommendations—culminating in a roadmap to deliver measurable outcomes.

2. Service Scope

- Stakeholder engagement: interviews and workshops with business, technical and commercial stakeholders; full meeting notes
- Requirements capture: functional, non-functional, technical and commercial requirements consolidated and prioritised in a master register
- Technical architecture assessment: integration points, data migration, hosting model, security and performance considerations
- Vision & recommendations: “how CRM will look”, value pathways, quick wins and adoption enablers with demonstrations/examples
- CRM market review: options analysis and technology recommendations (core CRM and related systems: case/workflow, document management, MI/reporting, communications)
- Roadmap planning: phased plan with dependencies, indicative budgets, resourcing model, governance and success measures
- Optional procurement support: RFP/ITT development, scoring criteria, demos/PoCs, partner selection and reference checks

3. Outcomes & Deliverables

- Requirements register (Excel) with priorities and traceability to strategic objectives
- Stakeholder interview notes and workshop outputs
- Technical architecture assessment and migration/integration options report
- CRM Market & Options presentation with recommendations
- Vision presentation of target experience and adoption approach
- High-level implementation plan: timeline, phases, dependencies, indicative budgets and resource estimates
- RFP/ITT pack and partner evaluation scoring matrix (optional)

4. User Needs & Typical Use Cases

This service is suited to public-sector organisations seeking to:

- Replace or optimise legacy CRM with modern cloud-based solutions
- Standardise case management, pipeline reporting and customer communications across directorates or regions
- Integrate CRM with line-of-business systems (e.g., ERP, document management, telephony/CTI, data platforms)
- Improve adoption and data quality while reducing total cost of ownership

5. Approach & Methodology

We use a two-phase method:

1. Phase 1 – Discovery & Definition

- Stakeholder interviews; context and success criteria established
- Iterative requirements capture using “straw-man” patterns and targeted workshops
- Current-state technical analysis including security, performance and data considerations
- Vision & prioritised recommendations with demonstrations

2. Phase 2 – Planning & Mobilisation

- Phased roadmap with dependencies and benefits realisation plan
- Budgetary guidance and resourcing model (client roles, supplier roles, governance, change management)
- Technology recommendations (core CRM + related systems)
- Procurement support (optional): RFP/ITT, scoring, demos/PoCs, references

6. Onboarding & Offboarding

Onboarding: kick-off meeting, access to stakeholders and existing documentation; agree governance, cadence and artefact templates. Offboarding: final presentation and handover of all artefacts (requirements register, reports, plans, RFP pack), plus transition briefing to internal teams or selected partners.

7. Availability, SLAs & Governance

- Start within agreed timelines; discovery typically 4–8 weeks subject to stakeholder access
- Weekly status updates and RAID log; end-of-phase review and sign-off
- Alignment to client governance and procurement practices; collaboration using approved tools

8. Dependencies & Constraints

- Timely stakeholder access and availability for workshops/interviews
- Access to current architecture documentation and data samples where appropriate

- Procurement timelines and information-security approvals may influence schedule

9. Security, Privacy & Accessibility

We align with client information-security policies and UK GDPR. Data is handled under agreed data-processing terms. We consider accessibility and inclusion in workshop design and produce accessible outputs (tagged PDFs, structured Word).

10. Pricing

Time-and-materials with options for capped phases or fixed-price work packages for clearly scoped deliverables. Travel and expenses at cost. Detailed estimates supplied after scoping.

11. Evidence & Case Studies

Available on request

12. Why Cantata

- Independent and vendor-neutral; we recommend what best fits public-sector needs
- Proven methodology and collateral accelerate delivery and reduce risk
- Depth of CRM expertise across leading platforms (e.g., Dynamics 365, Salesforce)
- Pragmatic consultants who have delivered complex programmes, not just advised

13. Contact

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