

Format14CRM

CRM Implementation, Integration and Managed Services (Creatio & SugarCRM)

G-Cloud Service Description – Customer-facing overview for UK public sector buyers.

At a glance

- End-to-end CRM delivery and managed services
- Creatio and SugarCRM platform specialists
- Designed for UK public sector needs
- Secure, compliant, and scalable cloud delivery

1. Service Overview

Format14CRM provides end-to-end CRM implementation, integration, and managed services using the Creatio and SugarCRM platforms. The service supports public sector organisations to design, deploy, operate, and continuously improve secure, cloud-based CRM solutions.

The service is modular and can be purchased as implementation-only, support-only, or as a full lifecycle managed service.

2. What the Service Includes

Discovery & Design

- Stakeholder and user needs analysis
- Process mapping and service design
- User journey and data model definition
- Security, access, and compliance design

Implementation & Configuration

- Creatio or SugarCRM configuration and customisation
- Custom data models and entities
- Role-based access control (RBAC)
- Workflow automation and business rules
- Dashboards, analytics, and reporting

Integration & Data Migration

- Integration with third-party systems and APIs
- Secure data migration from legacy systems
- Data validation and reconciliation

Testing & Deployment

- System and user acceptance testing (UAT)
- Release planning and deployment
- Go-live support and hypercare

Training & Adoption

- Role-based user training
- Administrator and super-user training
- Documentation and knowledge transfer

Support & Managed Services

- Incident, problem, and request management
- Change and release management
- Platform optimisation and continuous improvement

3. Why Format14CRM

Format14CRM is a specialist CRM consultancy with experience delivering configurable CRM platforms in complex public sector environments. Our approach focuses on reducing risk, ensuring compliance, and accelerating value.

- 1 Proven experience across central government, ALBs, and local authorities
- 2 Deep expertise in Creatio and SugarCRM platforms
- 3 Agile, phased delivery aligned to government best practice
- 4 Strong governance, transparency, and collaboration
- 5 Security and compliance embedded by design

4. Delivery Assurance & Risk Management

Delivery assurance is embedded throughout the service lifecycle to manage risk, dependencies, and change in public sector environments.

- 1 Active risk, issue, and dependency management with clear ownership
- 2 Formal change control aligned to Statements of Work
- 3 Clear buyer and supplier responsibilities
- 4 Regular governance, reporting, and escalation routes

5. Security & Compliance Snapshot

Area	Approach
Hosting	Secure cloud hosting on Microsoft Azure and/or AWS
Access Control	Role-based access control and least-privilege principles
Authentication	Multi-factor authentication for privileged users
Audit & Monitoring	Comprehensive audit logging and monitoring
Data Protection	GDPR and UK data protection compliance
Standards	Aligned to NCSC Cloud Security Principles

6. Service Options

- 1 Implementation-only: discovery through go-live
- 2 Implementation with hypercare and stabilisation
- 3 Fully managed service including support and continuous improvement

Accessibility: This document uses clear structure, readable fonts, high contrast, and logical reading order to support accessibility requirements.

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