



G-Cloud 15 – Revo SM Group Ltd

Halo ITSM, CRM & PSA Licensing,
Implementation and Support

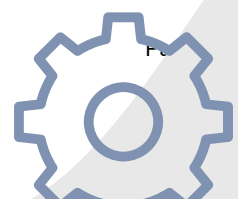




Table of Contents

1 Core Details 3

2 Service Overview 3

2.1 Licensing..... 3

2.2 Implementation 3

2.3 Support 3

3 What the Service Delivers 3

4 Features 3

5 Benefits 4

6 Security & Data Protection..... 4

7 Dependencies & Buyer Responsibilities 4

8 Exit & Transition..... 4

9 Ordering & Onboarding 4

10 Pricing..... 4

1 Core Details

Service Name: Halo ITSM, CRM & PSA Licensing, Implementation and Support

Supplier: Revo SM Group Ltd

Framework: G Cloud 15

Service Type: Cloud Cloud Support Lot 3

2 Service Overview

Halo ITSM, CRM and PSA are UK-hosted cloud platforms designed to streamline service delivery, customer management and professional services operations. They provide modern, configurable capabilities across ticketing, workflow automation, asset management, CRM, project management and time tracking. Revo licenses, implements and supports the Halo suite to ensure effective deployment and adoption across organisations.

2.1 Licensing

- Provision of Halo ITSM, CRM and PSA licences
- Named-user and concurrent licensing options
- Secure provisioning and environment setup
- Guidance on licence optimisation and scaling

2.2 Implementation

- Structured onboarding and configuration of Halo modules
- Requirements gathering and solution design workshops
- Workflow, form, automation and SLA configuration
- CRM setup including accounts, contacts, opportunities and activities
- PSA setup for projects, resource planning, time entry and billing
- Integrations with third-party tools (e.g., O365, Azure AD, Jira, Teams)
- Phased rollout across support, service, sales and delivery teams

2.3 Support

- Break-fix support and vendor escalation
- Administrator and end-user enablement
- Platform audits and optimisation reviews
- Configuration assistance included within licence cost

3 What the Service Delivers

- Fully configured Halo ITSM, CRM and PSA environments
- Incident, request, problem, change and asset workflows
- CRM database structure and sales workflows
- Project, timesheet and billing automation for PSA
- Custom dashboards and reporting packs
- Integrated workflows and process automation across departments

4 Features

- Modern, configurable ticketing and service management

- CRM capabilities for customer and pipeline management
- PSA tools for project delivery, time capture and billing
- UK-hosted secure cloud platform
- Built-in automation, SLAs and reporting
- Mobile and web access for all user types

5 Benefits

- Consolidated ITSM, CRM and PSA platform
- Predictable cost with support included in licence
- Reduced admin overhead and manual effort
- Improved service experience and customer engagement
- Faster deployment with scalable expansion
- Aligned to UK data residency requirements

6 Security & Data Protection

- UK-hosted data residency
- GDPR-aligned processes
- Secure SaaS platform architecture
- Customer retains full ownership of data
- Platforms are ISO27001 & SOC2 Type 2 certified
- Cyber Essentials + Certified Suppliers

7 Dependencies & Buyer Responsibilities

- Purchase of required Xurrent licences via Revo
- Access to stakeholders for workshops and sign-offs
- Provision of system/API access
- Participation in testing and acceptance

8 Exit & Transition

- All data retained within the Halo platforms
- Documentation and configuration artefacts provided at exit
- 30 day access at end of contract to retrieve data from the platforms
- 3-month termination notice period

9 Ordering & Onboarding

- Procurement via G-Cloud call-off
- SoW defines scope and deliverables
- Licensing and access provisioned upon contract signature
- Discovery phase followed by configuration and deployment

10 Pricing

- Support is included within the licensing, details available within the pricing document.

 More details can be found at <https://usehalo.com>



Get in touch

Revo United Kingdom

Forester House
Doctors Lane
Henley-in-Arden
Warwickshire
B95 5AW

+44 (0)1564 330 680

hello@revosm.com

Revo Scandinavia

Vasavägen 6
16958 Solna
Sweden

+46 708 62 17 28