



Service Definition Document

TTEC Digital Microsoft Dynamics 365 CRM
Implementation, Upgrade and Migration Services



Table of Contents

Table of Contents	2
1. Introduction	4
1.1. Company Overview	4
1.2. Value Proposition	5
1.3. What the Service Provides	8
1.4. Overview of the G-Cloud Service	14
1.5. Associated Services	15
2. Data Protection	17
2.1. Information Assurance/Security	17
2.2. Back-Up and Restore	19
2.3. Data Processing and Storage Location	20
2.4. Data Restoration / Service Migration	20
2.5. Business Continuity Statement / Plan	21
2.6. Privacy by Design	24
3. Using The Service	25
3.1. Ordering and Invoicing Process	25
3.2. Availability of Trial Service	25
3.3. On-Boarding	25
3.4. API	25
3.5. International SMS	26
3.6. Off-Boarding	27



3.7. Training	28
3.8. Implementation Plan	28
3.9. Service Management	29
3.10. Service Constraints	30
3.11. Service Levels	30
3.12. Outage and Maintenance Management	30
3.13. Financial Recompense Model for not Meeting Service Levels	30
4. Provision of the Service	31
4.1. Customer Responsibilities	31
4.2. Technical Requirements and Client-Side Requirements	32
4.3. Browsers	32
4.4. Outcomes/Deliverables	33
4.5. Development Life Cycle of the Solution	33
4.6. After Sales Account Management	34
4.7. Termination Process	34
5. Other Messaging Services	35
6. Environmental Action and Social Value	36
6.1. Environmental Action	36
6.2. Social Value	37
7. Our Experience	39
7.1. Case Study 1	39
7.2. Case Study 2	41



1. Introduction

1.1. Company Overview

G-Cloud 15 Legal Entity and Ownership

TTEC Consulting (UK) Limited, a TTEC Digital Company, is the legal entity for G-Cloud 15. TTEC Consulting (UK) Limited is ultimately owned by TTEC Holdings, Inc., a listed company publicly traded on the NASDAQ Stock Exchange.

Parent Company Overview: TTEC Holdings, Inc.

TTEC Holdings, Inc. (NASDAQ:TTEC) is a leading global customer experience (CX) technology and services innovator for AI-enabled digital CX solutions. Serving iconic and disruptive brands, TTEC's outcome-based solutions span the entire enterprise, touch every virtual interaction channel, and improve each step of the customer journey.

TTEC operates through two business segments:

- TTEC Digital: Designs, builds, and operates omnichannel contact centre technology, CRM, AI and analytics solutions.
- TTEC Engage: Delivers AI-enabled customer engagement, customer acquisition and growth, tech support, back office, and fraud prevention services.

TTEC Digital: Customer Experience Technology and Consulting Services

At TTEC Digital, we offer customer experience (CX) consulting, software, and technology services at the intersection of contact centre, CRM, AI and analytics. We call this intersection the point of conversation and we apply our expertise here to drive shareholder value for our clients in the form of revenue growth, cost reduction, and productivity improvement.

In today's digital landscape, customer conversations and the contact centre technologies that support them are inseparable. With decades of innovation across leading contact centre



platforms and deep expertise in CX strategy, data, and AI, TTEC Digital enables organisations to maximise their technology investments and create exceptional customer experiences.

Microsoft Credentials

TTEC Digital is recognised among top Microsoft partners worldwide for our commitment to innovation and delivering outstanding customer solutions. In addition to achieving 2025 Microsoft Dynamics 365 Service Partner of the Year, TTEC Digital has also been named to Microsoft's Inner Circle for AI Business Solutions for ten years in a row. Our deep expertise spans the full Microsoft ecosystem, including their Cloud and AI Platform (Azure, Fabric, Analytics) and AI Business Solutions portfolio (Dynamics 365, Copilot Studio, Power Platform, Teams), enabling us to deliver faster, smarter outcomes.

1.2. Value Proposition

TTEC Digital provides a comprehensive Microsoft Dynamics 365 CRM transformation service that enables public sector and enterprise organisations to deliver seamless, AI-enhanced customer experiences. By integrating CRM, contact centre, data, and analytics capabilities, TTEC supports end-to-end digital transformation aligned with measurable business outcomes. With deep expertise in Microsoft Copilot and AI automation, we help clients boost productivity and improve service quality. Our Adaptive Iterative Methodology (AIM) ensures structured delivery, governance, and continuous improvement, while SurroundCX™ Managed Services offer scalable post-implementation support. TTEC's solutions are fully aligned with UK public sector standards, including G-Cloud 15 compliance, Cyber Essentials Plus certification, and Net Zero commitments, making us a trusted partner for secure, sustainable, and impactful CRM modernisation.



Contact Centre Technology

Your contact centre serves as the main point of interaction between your business and your customers. Effective technology, empowered agents, and clear processes are critical to converting these customer interactions into key business outcomes like customer satisfaction, loyalty, and sales growth.

Artificial Intelligence

Along with our technology partners, TTEC Digital has pioneered AI solutions in the contact centre for more than a decade. That means we are ready to help you solve the tough questions, because we have solved them before. If AI is on your list, our team of CX experts can help you assess your AI roadmap, design an AI strategy, and deploy the right AI toolset to enhance your contact centre's productivity.

Customer Relationship Management

Your customer interactions take many forms. From sales to service to every touchpoint in between, a cohesive customer experience is the key to earning repeat business and lifetime loyalty. With CRM at the centre, TTEC Digital can help you execute a holistic CX strategy that strengthens your connection with customers and drives business growth.

CX Strategy and Design

Customer experience (CX) is evolving, but a significant gap remains between what brands think they are delivering and what customers actually experience. Despite investing in new CX technologies, many organisations still face declining customer satisfaction.

At TTEC Digital, we recognise that technology alone cannot bridge the experience gap; it demands a comprehensive strategy. Our CX designers and strategists focus on integrating



effective design and operational strategies first, ensuring they deliver the results your brand and customers deserve.

Data and Analytics

Harnessing the power of your data is critical to differentiate your customer experience. TTEC Digital's data and analytics solutions gather customer and journey data from across your organisation, transforming it into insights that strengthen your connection with customers and introduce valuable efficiencies to your contact centre operations.

Managed Services

The world is moving to a multi-cloud, multi-platform, multi-AI landscape. It is a complicated environment, and your customer experience depends on all aspects working perfectly in harmony.

So, how do you monitor the clouds and make sure apps are running as expected? How do you know which new platform features are best for your business? And how do you deploy these features safely and effectively?

You need to spend your time innovating and differentiating, not babysitting your CX technology. SurroundCX™ Managed Services can help.

Software and Digital Engineering

Built on the legacy expertise of Avtex, Serendebyte, Voicefoundry, Aria, and others, our comprehensive portfolio of IP solutions is designed to help you effortlessly deploy new features and customer experience capabilities into your contact centre environment.



1.3. What the Service Provides

The service offers extensive support for digital transformation by leveraging ERP and CRM, as well as change management and data science and analytics.

Our highly skilled team helps drive improvements to many aspects of your business creating efficiencies and growth.

TTEC Digital understands the CX transformation journey and what it takes to run a successful transformation for an organisation. harnessing the power of the latest technologies and seamlessly integrating them into businesses. As a global consultancy firm working across the private and public sectors, we specialise in delivering user-centric, cloud-first business applications built on the Microsoft ecosystem, including Dynamics 365, Power Platform, and Azure. Our approach combines deep technical expertise with a relentless focus on customer experience, leveraging advanced AI features like Microsoft Copilot to automate workflows, deliver intelligent insights, and ensure every transformation aligns with strategic goals while driving tangible value.

TTEC's 360 CX strategy is designed to help you eliminate poor member experiences keeping customer experience at the top of any Dynamics 365 implementation. TTEC provides the following services to implement Dynamics 365 solution or Upgrade and migrate to a Dynamics 365 solution. Our Experience 360 understands that a successful transformation programme for any customer touchpoint solution begins and ends with an excellent customer experience.



Our Dynamics 365 solution covers all aspects of Digital transformation including:

- **CX Strategy & Design:** Human-centred design to optimise every customer touchpoint, ensuring experiences are intuitive, inclusive, and aligned with user needs.
- **Dynamics 365 Implementation:** Full lifecycle delivery of CRM and ERP workloads using Microsoft Dynamics 365, tailored to public sector and enterprise requirements.
- **Upgrade & Migration Services:** Seamless transition from legacy Microsoft Dynamics systems (e.g., CRM, AX) to modern Dynamics 365 cloud-based platforms.
- **Integration & Data Migration:** Secure, scalable, and compliant integration of Dynamics 365 with existing systems, alongside structured data migration strategies.
- **Testing & Training:** Comprehensive quality assurance and user enablement programs, including Train-the-Trainer models to support long-term adoption.
- **Analytics & Business Intelligence:** Delivery of real-time dashboards, predictive analytics, and readiness for Microsoft Fabric to support data-driven decision-making.
- **Workforce Planning:** Strategic alignment of workforce capabilities with digital transformation goals, including forecasting and resource optimisation.



- **Adoption & Change Management:** Structured programs to drive user adoption, maximise ROI, and embed new ways of working across the organisation.
- **Solution/Version Migration:** Transitioning existing Dynamics solutions to newer versions with minimal disruption and full data integrity.
- **Solution/Version Upgrade:** Upgrading Dynamics 365 components to leverage the latest features, performance improvements, and security enhancements.
- **Managed Services Support:** Ongoing operational support, incident management, and continuous improvement of Dynamics 365 environments.
- **Centre of Excellence (CoE):** Establishment and operation of a CoE to drive governance, innovation, and best practices across Dynamics 365 and Power Platform usage.
- **AI & Copilot Enablement:** Implementation of Microsoft Copilot and AI capabilities, including readiness assessments, customisation, and responsible AI governance.
- **Low-Code/No-Code Enablement:** Empowering business users to build and extend applications using Power Apps, Power Automate (RPA), and Power Virtual Agents (chatbots), with governance frameworks in place; supporting low-code process automation and AI-driven self-service capabilities that are increasingly vital to Dynamics 365 projects.
- **Sustainability & ESG Reporting:** Leveraging Microsoft Cloud for Sustainability to support environmental, social, and governance (ESG) reporting and compliance.

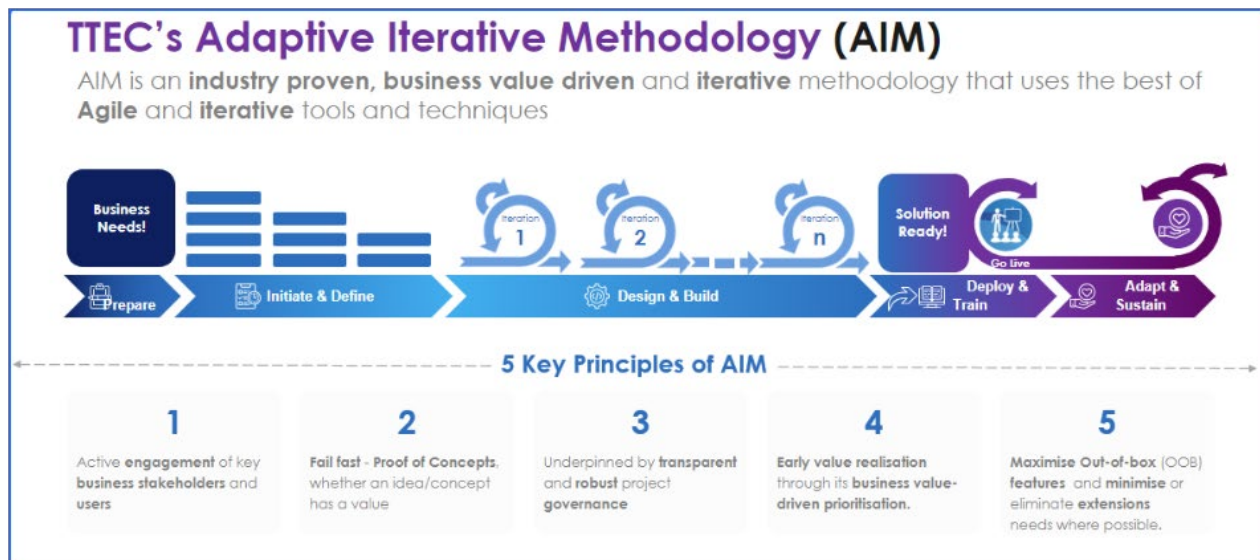


TTEC Digital caters to the all the Microsoft Dynamics components such as:

- Previous Microsoft Dynamics CRM & AX versions
- Microsoft Dynamics 365 CRM
 - Customer Insights – Data
 - Customer Insights – Journeys
 - Sales
 - Customer Service
- Microsoft Dynamics 365 Field Service
- Microsoft Dynamics 365 Finance
 - Supply Chain Management
 - Operations
 - Commerce
 - Human Resources
- Microsoft Power Platform
 - Microsoft Power Apps
 - Microsoft Power Automate
 - Microsoft Power Bi
 - Microsoft PowerPages
- Microsoft Azure
 - Data Service
 - Microsoft Azure Infrastructure
 - Microsoft Azure IoT Hub
 - Microsoft Azure AI cognitive services
- Microsoft Copilot and AI-infused experiences
- Microsoft Fabric (where applicable)
- Microsoft Digital Contact Centre Platform

Delivery Methodology

TTEC Digital's Adaptive Iterative Methodology (AIM), built on Microsoft's Success by Design guidelines and aligned with the FastTrack program, ensures Dynamics 365 solutions follow Microsoft's roadmap and best practices through structured design reviews and performance/security checks at key phases. With over 500 full lifecycle Dynamics 365 programmes delivered, our proven AIM framework, comprising five distinct phases: Prepare, Initiate and Define, Design and Build, Test, Train and Deploy, and Adapt and Sustain, incorporates quality gates and governance checkpoints with defined entry and exit criteria to drive transparency, alignment, and successful transformation outcomes.



AIM focuses on three key tenants

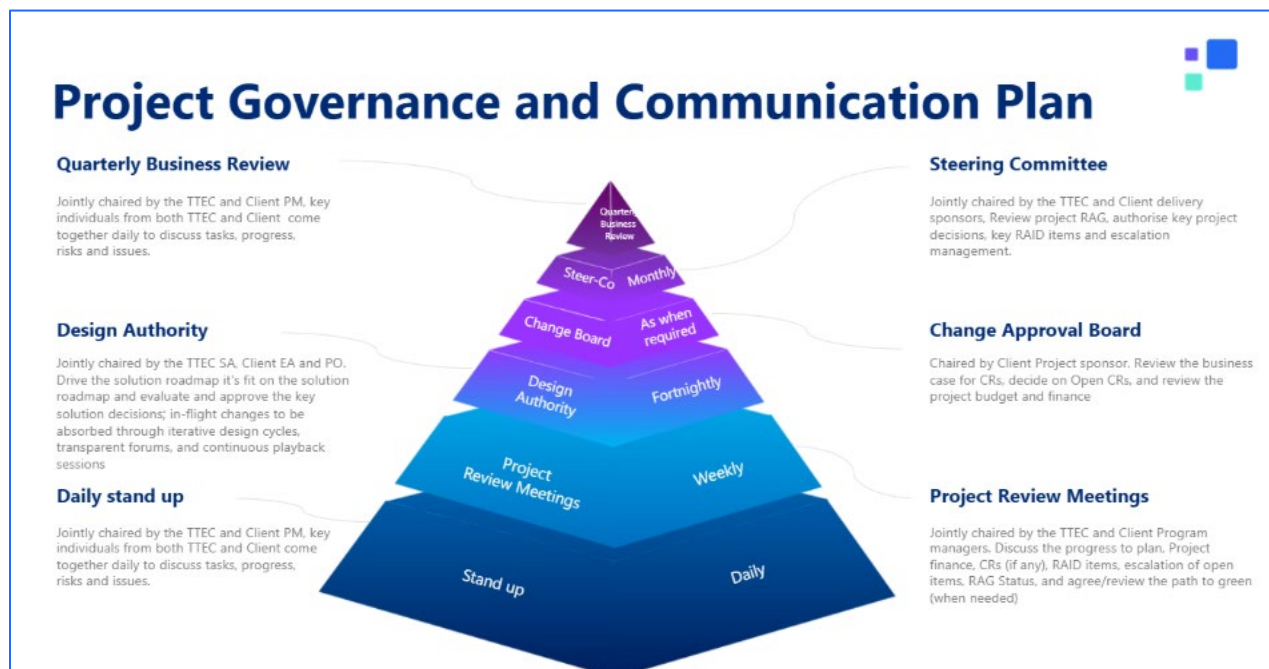
1. Customer Experience
 - o Defining a CX strategy - engage with the business to consistently render experiences that impress and inspire engagement and loyalty.
 - o Developing a comprehensive and actionable strategy is the first step in creating experiences that engage the end-users.
2. Robust and scalable architecture
 - o Plug-and-play to onboard different regions.



- o An architectural best practice is applied across the technology stack and line of business applications.
 - o A strong and repeatable test and release strategy.
 - o Integration is stable, scalable, and monitorable as each region is onboarded.
 - o Internal tickets categorised as application services, integration and other architecture are low.
3. Adoption and Ownership
- o Adoption is high for groups that contribute most to the business case (ROI).
 - o End users pro-actively asking for new features or upgrades.
 - o A high number of advocates.

Our Governance

AIM is supported by TTEC Digital's governance model, thus ensuring effective and timely governance is applied throughout the SDLC.





1.4. Overview of the G-Cloud Service

The CCS G-Cloud 15 framework provides public sector organisations with a streamlined, compliant, and flexible route to procure cloud-based services, including hosting, software, and support. Established under the Procurement Act 2023 as an open framework, G-Cloud 15 spans five refined lots covering cloud hosting (IaaS/PaaS), software (SaaS), and cloud support services. It replaces previous frameworks such as Cloud Compute and introduces direct award capability across all lots, enabling faster access to solutions without mandatory competition.

G-Cloud 15 is designed to support the UK government's Cloud First policy and digital transformation goals. It simplifies procurement while ensuring suppliers meet high standards for quality, security, and public value. The framework places increased emphasis on Social Value, requiring suppliers to demonstrate contributions to community, environmental, and economic outcomes. It also enforces sustainability commitments through Carbon Reduction Plans and aligns with Net Zero targets. Suppliers must adhere to cybersecurity standards such as Cyber Essentials Plus and maintain responsible business practices including prompt payment and ethical delivery.

TTEC Digital EMEA combines humanity and technology to serve the public with a digital-first approach. Our award-winning cloud contact centre and digital transformation solutions are available on the Digital Marketplace, supporting public sector organisations in modernising citizen services. We specialise in omnichannel customer experience (CX) platforms, AI-enabled automation, and scalable cloud solutions that align with government priorities. Our services include contact centre transformation, optimisation accelerators, omnichannel deployment, integration, analytics, training, and managed support.

With a proven track record in delivering secure, compliant, and impactful cloud solutions across the public sector, TTEC Digital is a trusted partner for organisations seeking to enhance citizen engagement, operational efficiency, and long-term digital resilience.



1.5. Associated Services

TTEC Digital provides a comprehensive suite of associated services that complement core CRM implementation, upgrade, and migration activities. These include structured assessments of legacy CRM platforms and strategic planning for migration to Microsoft Dynamics 365, ensuring a smooth transition. Our data migration and quality assurance services leverage tools such as Azure Data Factory and KingswaySoft to perform schema mapping, cleansing, and ETL processes. We offer tailored CRM customisation and extension services, including the development of plugins, workflows, and Power Platform components designed to meet public sector requirements. Integration services are delivered using Azure Integration Services to enable secure and scalable connectivity with ERP systems, telephony platforms, citizen portals, and third-party applications. To support successful adoption, we provide change management and training programs, including stakeholder engagement strategies and tailored sessions for both trainers and end users. Post-go-live, our hypercare services ensure system stability and performance through dedicated support, usage analytics, and enhancement planning.

TTEC Digital's Adapt and Sustain services within the Microsoft stack offer a unified Delivery Operations as part of a steady-state support mechanism for all Microsoft Biz Apps in the application ecosystem. This provides a unique ability to accomplish continuous change arising from business changes or product changes from Microsoft.



TTEC is a global organisation with extensive experience supporting clients on a regional and global scale. Our global Centres of Excellence (CoE) underpin the Lifetime Services model, offering:

- **Continuous CRM Optimisation:** Feature enablement aligned with Microsoft release waves.
- **Reusable Accelerators:** Pre-built templates for case management, citizen engagement, and service request workflows.
- **Expert Advisory:** Access to FastTrack Recognised Solution Architects for CRM strategy and delivery.



2. Data Protection

2.1. Information Assurance/Security

Information security is one of the important pillars of TTEC Holdings, Inc. (NASDAQ: TTEC) and TTEC affiliates core global business model, and maintaining it is crucial for our company, our stakeholders, and our clients. By performing internal audits and independent IT compliance audits, the results provide information that can be used to improve operations, enhance accountability, and identify areas for improvement.

The adherence and certification to multiple compliance frameworks ensures that TTEC maintains industry standards to secure data and network systems for our business and our clients. To maintain compliance across these frameworks, TTEC contracts an independent, third party, accredited, qualified auditing firm to conduct the following assessments. Depending on the platform, TTEC technology environment and business facility space, TTEC aligns and is certified under these compliance frameworks:

Engage:

- PCI DSS (Service Level 1) - maintained and assessed annually.
- SOC 1 Type II (SSAE 18) - maintained and assessed annually.
- SOC 2 Type II (SSAE 18 / 4 of the 5 Trust Principles) - maintained and assessed annually.
- ISO 27001: 2022 - maintained and assessed annually. Full assessment year 1, surveillance audits year 2 and 3.
- HIPAA S.C.R.A. - maintained and assessed annually.

Digital:

- PCI DSS (Service Level 1) - maintained and assessed annually.
- SOC 2 Type II (SSAE 18 / 4 of the 5 Trust Principles) - maintained and assessed annually.



- ISO 27001: 2022 - maintained and assessed annually. Full assessment year 1, surveillance audits year 2 and 3.
- HIPAA S.C.R.A. - maintained and assessed annually.

TTEC Consulting (UK) Limited and TTEC (UK) Solutions Limited Environments (EU Cloud Services Only):

- Cyber Essentials Certificate of Assurance (Basic) - maintained and assessed annually for EU cloud services only.
- Cyber Essentials Certificate of Assurance (Plus) - maintained and assessed annually for EU cloud services only.

Cyber Essentials and Cyber Essentials Plus are certifications developed and recognised by the UK government to help organisations protect themselves against common cyber threats and demonstrate their commitment to cybersecurity best practices.

TTEC's achievement of the Cyber Essentials and Cyber Essentials Plus certifications validates TTEC's security controls and safeguards implemented and maintained adhere to these cybersecurity best practices, how we secure TTEC and our clients against common cyber threats and how TTEC demonstrates, annually, our commitment to improving our cybersecurity posture to align to these best practices.

The following provides an overview of each Cyber Essentials Certification assessment which includes but not limited to:

- Cyber Essentials Certification:
 - Focuses on five key areas of cybersecurity: boundary firewalls and internet gateways, secure configuration, user access control, malware protection, and patch management.
 - Designed for organisations of all sizes and sectors.



- Requires organisations to complete a self-assessment questionnaire and provide evidence of their cybersecurity measures.
- Certification is valid for one year and can be renewed annually.
- Provides a basic level of assurance to customers, suppliers, and stakeholders that an organisation has implemented essential cybersecurity controls.
- Cyber Essentials Plus Certification:
 - Includes all the requirements of Cyber Essentials certification.
 - Involves an independent assessment and verification of an organisation's systems to ensure they meet the necessary security standards.
 - Requires organisations to undergo vulnerability scanning and penetration testing.
 - Provides a higher level of assurance compared to Cyber Essentials certification.
 - Certification is valid for one year and can be renewed annually.

2.2. Back-Up and Restore

TTEC Digital provides consulting services for Microsoft Dynamics 365 CRM, a SaaS solution hosted on Azure. While we do not deliver platform-level backup and restoration, we advise clients on leveraging Microsoft's built-in data protection features, including automated backups, geo-redundancy, and recovery options. Where appropriate, we support the design of governance and continuity strategies aligned with Microsoft's SLAs and compliance standards. Business Continuity and Disaster Recovery planning is available as part of our consulting engagements, tailored to client-specific needs and regulatory requirements.



2.3. Data Processing and Storage Location

TTEC Digital's services for Microsoft Dynamics 365 CRM are consulting-led and delivered on Microsoft's SaaS platform hosted in Azure cloud environments. Data processing and storage are governed by Microsoft's compliance with UK data residency and sovereignty requirements, including hosting within UK or EU data centres where applicable.

TTEC supports clients in understanding and configuring data location settings, retention policies, and privacy safeguards in line with contractual obligations and regulatory frameworks. Where required, bespoke Data Processing Agreements (DPAs) are established to define roles, responsibilities, and technical and organisational measures for data protection, including intercompany standard contractual clauses

2.4. Data Restoration / Service Migration

TTEC Digital provides strategic consulting and delivery services to support seamless data restoration and service migration within Microsoft Dynamics 365 CRM environments. Our Adaptive Iterative Methodology (AIM) governs each phase of the transformation lifecycle: Prepare, Initiate and Define, Design and Build, Test, Train and Deploy, and Adapt and Sustain; ensuring data integrity, continuity, and compliance throughout. We conduct structured assessments of legacy systems, plan secure transitions, and execute migrations using scalable tools such as Azure Data Factory. Each AIM phase includes defined quality gates and governance checkpoints to mitigate risk and align outcomes with business objectives. Whether transitioning from on-premise to cloud or upgrading between Dynamics versions, our framework ensures right-first-time delivery of resilient and compliant CRM solutions tailored to public sector needs.



2.5. Business Continuity Statement / Plan

TTEC and TTEC's affiliates are committed to business continuity planning, a prudent business practice to protect employees, clients, stakeholders, and TTEC from various risks and events that may impact the ability to conduct business. TTEC's programme aligns with ISO 22301, NIST 800-34 & 84, CSF (Cyber Security Framework) and Disaster Recovery Institute International – The Professional Practices for Business Continuity Management.

TTEC, being a global company, must remain diligent and be prepared when unexpected incidents occur (fire, earthquakes, typhoons, hurricanes, human events, etc.). TTEC's Crisis and Resiliency Management programme, which includes Business Continuity (BC) and IT Disaster Recovery (DR), emphasises the ability to continue providing business services in the face of adverse operational impacts. TTEC's Global Crisis Management Programme is led by the Vice President of Business Continuity (BC) and IT Disaster Recovery (DR).

TTEC's approach to global crisis and business continuity and IT disaster recovery is to adhere to guiding principles of: Putting People First; Establish Trust; Protection of Clients; and Providing Leadership, with managing unexpected and expected incidents and events. With a strong focus on these principles, TTEC will have the ability to anticipate, prevent, recover from, and learn from crises that may impact employees, facilities, brand/reputation, or operations. Along with TTEC achieving the protection of TTEC's people, TTEC's clients and client's brand, profits and TTEC's brand.

TTEC's Global Crisis and Business Continuity (BC) and IT Disaster Recovery (DR) Management programme has developed a product-driven customer focused recovery model that is both practical and scalable. TTEC establishes, implements, and maintains world class crisis response capabilities through solidifying policies and procedures for response to an emergency or other occurrence that can compromise the privacy, confidentiality, integrity, or availability of Client Personal Information and/or damage TTEC's information systems. Such policies and procedures



include, but are not limited to: creating and maintaining retrievable copies of Client Personal Data; restoring any loss of Client Personal Information; enabling continuation of critical business processes involving Client Personal Information in emergency mode; assessing relative criticality of specific applications and Client Personal Information to support other contingency plan components; periodic and annual testing and updates of contingency plans and implement lessons learned from testing.

The programme integrates and builds upon existing capabilities within our Security Event Handling Plan, Information Security Operations, Business Continuity, IT Disaster Recovery and Virtual Response teams. Additional partners in resiliency include Information Technology, Operations, Real Estate and Facilities, Legal, People and Culture, and other shared services. The unifying approach and framework are contained in TTEC's Global Crisis Management Policy for managing and responding to crises across TTEC's global enterprise (including but not limited to WFH environment).

TTEC provides redundancy in our technology through hardware and software configuration. Redundancy provides clients with the services that in the event of hardware failure, or software failure, services remain active and available.

Redundant premise equipment mitigates the risk of equipment failure; dual firewalls with stateful inspection, dual routers, and dual core switches in the data centre provide a highly available architecture for client links. TTEC firewall infrastructure provides stateful inspection and the configuration is in active/active or active/standby mode depending on the project specifications/requirement.

The different types of DRP technology and redundancy capabilities used include but not limited to:

- Geo-redundant centralised data centres.
- Dual MPLS WAN via multiple carriers.



- Carrier grade disaster recovery.
- Voice via PSTN TFN/DID, TDM, VoIP, or SIP (SBC).
- Regular testing to ensure readiness and After-Action Plans for lessons learned.
- Functional Management tool that enables systemic, collaborative, and controlled resiliency programme management.

In addition, at least annually, TTEC's Executives (Sr. Advisor BCDR/Resiliency, CSO, CIO, IT, and other supporting departments) review the Global Crisis Programme and the Business Continuity and IT Disaster Recovery plans, processes, and policies, update (as needed) to align to TTEC's business, security and compliance models and adherence with industry compliance framework requirements. TTEC's BCDR and applications are exercised annually and are governed by our Crisis Management and Disaster Recovery policies and guidelines. TTEC's Global Crisis and Resiliency Management Programme, including TTEC's Security Event Handling Programme is assessed and maintained annually, and is certified against TTEC's ongoing industry compliance audit assessments of PCI DSS, SOC 2 Type II, ISO 27001:2022, HITRUST and more.

Lastly, regarding TTEC's Business Continuity (BC) and IT Disaster Recovery (DR) plan approach, TTEC bridges a partnership with our clients with the development of a specific client focused business continuity (BC) and disaster recovery (DR) plans. TTEC collaborates with clients to build a tailored, resilient, and mutually agreeable BC and IT DR plan that encompass applicable TTEC Technology and Services, prevailing industry compliance standards, information security controls, safeguards, and measures, along with operational best practices, and client-specific SLA requirements. Through TTEC and client partnership and strong collaboration will result with eliminating risks and returning to "business as usual" status, and more.



2.6. Privacy by Design

TTEC Digital accommodates applicable data privacy regimes through bespoke data processing agreements (DPA) with its customers that set forth relevant rights and obligations in the context of the data controller-data processor relationship. TTEC Digital also applies appropriate agreed technical and organisational measures and data privacy safeguards (including intercompany standard contractual clauses) to satisfy the legal requirements and the DPA undertakings.



3. Using The Service

3.1. Ordering and Invoicing Process

Buyers wishing to find out more about this service and how to order should contact Wayne Kay, VP EMEA, at gcloud@ttecdigital.com

3.2. Availability of Trial Service

There is currently no Trial Service available.

3.3. On-Boarding

TTEC Digital's onboarding process begins with a collaborative scoping exercise, where we work closely with the customer to define a precise scope of work based on our service definitions and associated rate card. This scope forms the foundation of the engagement and is aligned with our Adaptive Iterative Methodology (AIM), which governs each phase of delivery, from preparation through deployment and sustainment. Our onboarding includes stakeholder alignment, access planning, and readiness assessments to ensure a smooth project start. We also provide tailored implementation plans, training accelerators, and change management support to drive adoption and ensure the solution delivers measurable business value.

3.4. API

TTEC Digital delivers robust and scalable API and integration services as part of its Microsoft Dynamics 365 CRM implementation, upgrade, and migration offerings. Our approach leverages Microsoft Dataverse, RESTful APIs, and Power Platform connectors to enable secure, extensible, and monitorable integration with ERP systems, telephony platforms, citizen portals, and third-party applications. Using Azure Integration Services, including Logic Apps, Service Bus, and API



Management, we design architectures that support real-time data exchange, event-driven automation, and AI-powered features such as Microsoft Copilot. Integration requirements are captured and validated throughout the delivery lifecycle using our Adaptive Iterative Methodology (AIM), which includes governance checkpoints and quality gates across each phase.

Where required, TTEC Digital can develop custom APIs to meet unique business needs or collaborate with third-party vendors who have built connectors or integration components. This flexible and future-ready approach ensures seamless interoperability across the public sector's digital ecosystem while aligning with Microsoft's evolving CRM capabilities.

3.5. International SMS

TTEC Digital incorporates international SMS capabilities as part of its multichannel CRM implementation strategy, enabling public sector organisations to extend citizen engagement beyond traditional voice channels. During implementation, SMS is integrated into the CRM and telephony infrastructure, supporting deflection from IVR to messaging and enabling citizens to initiate contact via SMS or web-based entry points. These capabilities are designed to handle high-volume contact scenarios and are fully embedded within CRM workflows to ensure continuity of service and accurate data capture.

As part of upgrade services, TTEC Digital ensures that existing SMS capabilities are modernised in line with Microsoft Dynamics 365 enhancements and evolving citizen expectations. This includes aligning SMS workflows with new CRM features such as real-time messaging, asynchronous communication, and AI-powered automation via Microsoft Copilot. TTEC also supports the reconfiguration of SMS connectors and APIs to ensure compatibility with upgraded environments and compliance with regional telecom standards.

TTEC Digital supports the migration of SMS services from legacy platforms to Microsoft Dynamics 365 CRM, ensuring seamless continuity of messaging capabilities. This includes assessing existing



SMS infrastructure, planning secure transitions, and implementing scalable solutions using Azure Communication Services. Where required, TTEC can develop custom SMS APIs or collaborate with third-party providers to integrate pre-built connectors, ensuring that international messaging remains compliant, responsive, and fully integrated with the new CRM environment.

TTEC Digital will plan and coordinate all international SMS implementation, upgrade, and migration activities to ensure minimal disruption to existing telephony services. Our delivery teams work closely with client stakeholders and technical leads to align integration timelines, validate routing configurations, and conduct controlled testing prior to go-live. This approach ensures continuity of service, preserves citizen experience, and supports a smooth transition to enhanced messaging capabilities within the Dynamics 365 CRM environment.

3.6. Off-Boarding

TTEC Digital's offboarding process is designed to ensure a smooth and structured disengagement at the conclusion of the engagement. In alignment with the agreed scope of work and commercial terms, TTEC will work with the customer to define a clear exit plan that includes the transfer of deliverables, documentation, and knowledge required to support continuity. This may include final performance reports, implementation artefacts, training materials, and change management documentation. Where applicable, TTEC will support the customer in transitioning services to internal teams or alternative providers, ensuring minimal disruption to operations. All offboarding activities are planned collaboratively to meet contractual obligations and maintain data protection and confidentiality standards.



3.7. Training

TTEC Digital's training accelerator provides rollout implementation support and includes expert project management to ensure successful enablement of Microsoft Dynamics 365 CRM solutions. A key component of our approach is the ability to measure and track the impact of training on key performance indicators, ensuring that learning translates into business value. Our training services include the development and execution of a comprehensive training plan, content creation, and delivery tailored to the client's needs, whether through Train-the-Trainer programmes (or direct End User Training subject to further definition and agreement).

To support adoption of new Microsoft features such as Copilot, TTEC Digital incorporates targeted enablement sessions that help users understand and apply AI-powered capabilities within their day-to-day CRM workflows. These sessions are designed to demystify Copilot functionality, promote confidence in its use, and accelerate productivity gains. Our training is delivered alongside a structured change management plan, which includes stakeholder communication strategies and adoption tracking to drive end-user engagement and ensure a smooth transition to enhanced CRM capabilities.

3.8. Implementation Plan

TTEC Digital provides a structured and comprehensive implementation plan as part of its Microsoft Dynamics 365 CRM delivery services. Upon completion of the scope of works, a detailed delivery plan is shared with the buyer, tailored to the agreed requirements and aligned with our Adaptive Iterative Methodology (AIM). This plan outlines key phases, Prepare, Initiate and Define, Design and Build, Test, Train and Deploy, and Adapt and Sustain, each governed by quality gates and defined entry and exit criteria.

The implementation plan includes timelines, resource allocation, milestone tracking, risk mitigation strategies, and stakeholder engagement activities. It also incorporates change



management and training components to support user adoption and ensure a smooth transition. TTEC Digital's approach ensures transparency, accountability, and alignment with business objectives, enabling public sector organisations to realise value quickly and confidently from their CRM transformation.

3.9. Service Management

Service Management is aligned with the specific scope of work that will be provided to the buyer on completion of the scope of works. TTEC Digital applies a structured and collaborative approach to service management throughout the lifecycle of Microsoft Dynamics 365 CRM implementation, upgrade, and migration engagements. Our delivery is governed by the Adaptive Iterative Methodology (AIM), which ensures that service oversight, quality assurance, and stakeholder alignment are embedded into each phase, from preparation through to sustainment.

Each engagement is supported by a dedicated Customer Success Manager who acts as the primary point of contact and strategic advisor. This role ensures that service delivery remains aligned with business objectives, facilitates regular service reviews, and supports roadmap planning for future enhancements. Our service management model also includes governance checkpoints, performance tracking, and escalation protocols to ensure transparency and accountability.

TTEC Digital's service management framework is designed to deliver consistent outcomes, minimise risk, and foster long-term partnerships. It integrates with client-side programme and service teams to ensure seamless coordination across project delivery, support, procurement, and finance functions. This approach ensures that CRM solutions are not only delivered successfully but are also sustained and optimised post-implementation.



3.10. Service Constraints

There are no Service Constraints for a Consulting exercise beyond the need to have the relevant people and information available to conduct the exercise. TTEC will work with you to define all necessary information during the scoping of the requirement and these needs will be identified in the appropriate Scope of Works.

3.11. Service Levels

TTEC Digital does not provide Service Levels for consulting arrangements. Service Levels are available for technical implementations.

3.12. Outage and Maintenance Management

Outage and Maintenance Management is not required.

3.13. Financial Recompense Model for not Meeting Service Levels

TTEC Digital does not provide Service Levels for consulting arrangements. Service Levels are available for technical implementations.



4. Provision of the Service

4.1. Customer Responsibilities

TTEC Digital's successful delivery of Microsoft Dynamics 365 CRM implementation, upgrade, and migration services depends on active collaboration with the customer.

The following responsibilities and assumptions apply:

- **Access and Availability:** The customer will provide timely access to relevant personnel, systems, and environments required to perform the service. This includes business stakeholders, subject matter experts, and technical contacts who can support discovery, validation, and testing activities.
- **Data and Information Provisioning:** The customer is responsible for supplying accurate and complete data, documentation, and business process information necessary to support solution design, configuration, migration, and integration.
- **Decision-Making and Governance:** The customer will participate in governance checkpoints, provide feedback on deliverables, and make timely decisions to avoid delays in the delivery schedule.
- **Environment Readiness:** Where applicable, the customer will ensure that environments (e.g. sandbox, production) are provisioned and accessible for implementation and testing activities.
- **Third-Party Coordination:** If third-party systems or vendors are involved (e.g. SMS gateways, ERP platforms, legacy CRM), the customer will facilitate coordination and access to ensure integration and migration activities can proceed smoothly.

These assumptions will be validated and refined during the scoping phase, and documented in the final Scope of Works. TTEC Digital will work with the customer to ensure all dependencies are clearly understood and managed to support a successful engagement.



4.2. Technical Requirements and Client-Side Requirements

TTEC Digital's delivery of Microsoft Dynamics 365 CRM implementation, upgrade, and migration services requires certain client-side technical and organisational prerequisites to ensure successful engagement. These include providing timely access to relevant personnel, systems, and environments, as well as accurate and complete data and documentation to support solution design, configuration, and testing. Clients are expected to provision appropriate environments (e.g. sandbox, production) and ensure readiness for integration activities. Where third-party systems or vendors are involved, coordination and access must be facilitated to support seamless interoperability. These requirements will be validated and agreed during the scoping phase and documented in the final Scope of Works to ensure alignment and minimise delivery risk.

4.3. Browsers

TTEC Digital's Microsoft Dynamics 365 CRM implementation, upgrade, and migration services are delivered on Microsoft's SaaS platform, which is accessible via modern web browsers. For optimal performance and compatibility, users should access Dynamics 365 using supported browsers such as Microsoft Edge, Google Chrome, Mozilla Firefox, or Apple Safari. We recommend using the latest stable versions of these browsers to ensure full access to features, security updates, and responsive user experience. Where applicable, browser settings may need to allow pop-ups, enable JavaScript, and support cookies to ensure seamless interaction with embedded CRM components and integrations.



4.4. Outcomes/Deliverables

The deliverables/outcomes of this service will be aligned with the specific scope of work that will be provided to the buyer whilst awarding the contract.

Typical deliverables include:

- Documented customer experience vision and strategy.
- Documented customer journey maps and prioritised friction points.
- A solution prototypes.
- Documented implementation plan.
- Documented reports on the performance of the change on key performance measurement.
- Successful fulfilment of the agreed requirements.
- Documented change management plan.
- Documented training plan and training content.

4.5. Development Life Cycle of the Solution

TTEC Digital applies a structured and proven delivery framework to all Microsoft Dynamics 365 CRM implementation, upgrade, and migration engagements. The specifics of the development lifecycle will be aligned with the scope of work and agreed upon with the buyer at contract award. Our Adaptive Iterative Methodology (AIM) ensures that each stage of delivery is governed by quality gates, stakeholder alignment, and clearly defined entry and exit criteria. This approach supports right-first-time delivery, promotes transparency, and enables measurable outcomes. TTEC Digital's lifecycle governance model ensures that the solution evolves in line with business objectives, user needs, and Microsoft's roadmap, while maintaining compliance and scalability throughout the engagement.



4.6. After Sales Account Management

Once you become a TTEC Digital Customer, you will be assigned a Client Success Manager (CSM), who will be responsible for the relationship with your organisation. Your CSM will act as your trusted advisor and will get to know you and your business and help you to identify key strategic objectives to meet your organisational goals. Your CSM will also run regular business/service reviews with you to make sure that we are helping you to deliver effective solutions and will also help you to roadmap your journey to digital transformation. Your CSM is your first point of escalation in times of need. Whilst our teams will align directly with your teams (Project & Programme Management, Service, Support, Procurement, Finance, etc), your CSM will take overall responsibility for the relationship and communication with your organisation. TTEC Digital's Account Strategy is to make sure that we meet and exceed your expectations. We see the role as a key function to ensure smooth service delivery and to educate, benchmark and challenge the status quo, helping you to drive efficiencies and outstanding Customer Experience wherever possible.

We see effective Account Management as a way to build a long term and valuable partnership with your organisation.

4.7. Termination Process

TTEC Digital is open to entertaining reasonable termination mechanisms as part of the contract negotiation that will account for the specificities of the individual business opportunity and the associated commercial terms.



5. Other Messaging Services

TTEC Digital supports the integration of a wide range of messaging services within Microsoft Dynamics 365 CRM environments to enable multichannel and omnichannel citizen engagement. These services extend beyond traditional SMS and include platforms such as WhatsApp, Facebook Messenger, Apple Business Chat, Google Business Messages, and email-based messaging. Our approach ensures that these channels are securely integrated into CRM workflows, enabling asynchronous communication, automated responses, and seamless escalation to live agents when required.

We work with leading messaging providers including Twilio, Infobip, Sinch, and Microsoft Azure Communication Services to deliver scalable and compliant messaging solutions. Where applicable, TTEC Digital configures and manages authentication tokens, webhook endpoints, and API credentials to ensure secure and reliable message delivery. We also support custom connector development and integration with third-party messaging platforms, allowing clients to leverage existing investments or preferred vendors.

As part of our implementation and upgrade services, TTEC Digital ensures that messaging services are aligned with Microsoft's latest CRM capabilities, including Copilot. We enable Copilot to support conversational messaging scenarios, such as summarising message threads, drafting responses, and automating follow-ups; enhancing agent productivity and citizen experience. Our delivery methodology includes planning for message routing, consent management, data capture, and analytics, ensuring that messaging services are embedded into the broader CRM strategy.

Client responsibilities include provisioning access to third-party messaging platforms, providing necessary credentials and configuration details, and ensuring that any required data protection agreements are in place. TTEC Digital will work collaboratively with client-side teams and vendors to ensure a smooth and secure integration process, with minimal disruption to existing services.



6. Environmental Action and Social Value

6.1. Environmental Action

Global Environmental Governance and Strategy

TTEC manages its environmental impact through a structured governance and operational framework. Oversight is provided by a dedicated Board committee and an Environmental, Social, Governance (ESG) Executive Council. We operate under a formal [Climate Change and Environmental Responsibility Policy](#) and align our disclosures with recognised frameworks, including SASB and TCFD. Our environmental strategy includes initiatives focused on energy efficiency, waste reduction, and emissions tracking, with progress informed by regular materiality assessments.

UK-Specific Environmental Action and Net Zero Commitment

TTEC Consulting (UK) Limited is committed to environmental sustainability and achieving net zero emissions by 2045, ahead of the UK Government's 2050 target. Our UK Executive Team has formally endorsed and published a comprehensive [Carbon Reduction Plan](#) that fully complies with PPN 06/21 and its associated guidance. The plan includes transparent disclosures of Scope 1 and Scope 2 emissions, as well as relevant Scope 3 categories, and is reviewed annually to ensure continued alignment with evolving regulatory standards and net zero objectives. This proactive approach reflects our leadership in climate responsibility and our dedication to supporting public sector clients in meeting their sustainability goals.



6.2. Social Value

Creating Positive Impact for Customers and Communities

At TTEC Digital, we are committed to creating lasting social value that benefits both our clients and the communities they serve. Our efforts focus on tackling economic inequality, advancing equal opportunities, and expanding digital inclusion throughout the UK.

To support this mission, every UK-based TTEC Digital employee is encouraged to participate in corporate social responsibility (CSR) initiatives, with one paid day annually reserved for volunteering and community engagement.

Empowering Youth Through Digital Skills

At TTEC Digital, we believe in leveraging our expertise and partnerships to create opportunities for the next generation. One example is the Digital Dev Academy, a collaborative programme that equips students from underserved communities with essential digital and technology skills. The programme is delivered in partnership with TTEC Digital and its network of clients, with support from local authorities and education stakeholders. Its goal is to create inclusive pathways into technology careers by providing hands-on learning experiences and exposure to real-world digital environments.

We work closely with clients to co-design the curriculum, ensuring it reflects current industry needs and emerging technologies. These partners also contribute mentorship, resources, and opportunities for students to engage with professionals across sectors. Their involvement helps bridge the gap between education and employment, making the learning experience both practical and aspirational.

In parallel, we collaborate with county councils to identify eligible schools and students, coordinate logistics, and ensure the program is accessible to those who need it most. This partnership is vital for community engagement and helps embed the academy within local



development strategies. It culminates in a showcase event where students present their work and explore career opportunities with participating partners. The Digital Dev Academy is a powerful example of how cross-sector collaboration can drive social impact and digital inclusion.

Promoting Fair Employment and Economic Resilience

TTEC Digital is a Living Wage accredited employer in the UK, reinforcing our commitment to fair pay, community resilience, and inclusive growth. This milestone reflects our broader mission to empower future talent, support public sector innovation, and create lasting social impact.

At TTEC Digital, we believe that fair pay fosters a positive and collaborative work environment. By ensuring our employees feel genuinely valued, we strengthen relationships across teams and empower individuals to thrive. This leads to better outcomes for our clients, including:

- More engaged teams focused on solving customer challenges.
- Technical experts who go the extra mile to deliver innovative solutions.
- Project managers who build stronger, more trusting relationships.
- Consultants who invest their full expertise in transforming businesses.



7. Our Experience

7.1. Case Study 1

CLIENT CUTS COSTS AND BOOSTS EFFICIENCY THROUGH DIGITAL TRANSFORMATION WITH TTEC DIGITAL AND MICROSOFT

The Challenge

The customer provides affordable housing and care throughout the United Kingdom, serving over 140,000 residents across 70,000 homes. To enhance customer experiences and improve delivery, the customer sought to better manage customer journeys through digital transformation. Achieving this goal was challenging due to manual and fragmented processes, limited consistency across tools and delivery models, and overlapping data across multiple platforms.

The Solution

TTEC Digital conducted extensive stakeholder envisioning sessions and identified more than 50 pain points, subsequently shaping a multi-phased targeted digital transformation roadmap. The team then implemented a scalable, automated bulk communication tool within Microsoft D365 as well as an integrated solution through Microsoft Dynamics 365 Case Management, featuring tailored business process flows, automated data capture, and seamless backend integrations using Azure API to streamline onboarding, re-letting, and tenancy management processes.

The Result

By replacing manual processes with integrated digital solutions, the customer has achieved significant efficiency gains, cost savings, and improved service delivery capabilities, as illustrated in the following results:

- 1,670 hours of manual work eliminated through automation.
- Estimated savings of £25,000 on postage costs.



- Processes that previously took a week now completed in 20 minutes.
- Projected savings of £100,000 annually through reduced re-let times.
- 3,000 cases going through end-to-end tenancy management experience.

"The success of this digital transformation project significantly enhances our service delivery and operational efficiency for our residents and team. This collaboration with TTEC Digital has not only streamlined our processes but also enriched the experiences of our residents, aligning perfectly with our strategic objectives."

- Executive Director of Customer Experiences



7.2. Case Study 2

CLIENT TRANSFORMS GLOBAL MARKETING OPERATIONS WITH TTEC DIGITAL

The Challenge

The Client a global manufacturing leader in consumer health and hygiene, manages marketing for iconic brands like Lysol, Enfamil and Mucinex across more than 60 countries. The client sought to migrate its email marketing operations to Microsoft Dynamics 365 Customer Insights. The project quickly evolved into a full-scale modernisation of its marketing ecosystem, across all countries and a diverse portfolio of brands. Amid disconnected workflows, escalating operational costs, and growing demands for data oversight, and the client partnered with TTEC Digital to deliver a scalable, AI-driven platform that unifies and elevates its marketing capabilities.

The Solution

Seeking to go beyond platform migration, the client wanted to also elevate their marketing effectiveness, develop comprehensive buyer profiles, and create seamless journey tracking capabilities. TTEC Digital helped the client achieve their goals by implementing Dynamics 365 Customer Insights across the client's global marketing team to streamline marketing efforts. Key efforts included email marketing automation, data integration and standardisation, and end-to-end process optimisation. The team created a unified customer profile by integrating existing data and other supporting systems. The new system also improved marketing campaign management with hyper-personalisation using AI.

The Result

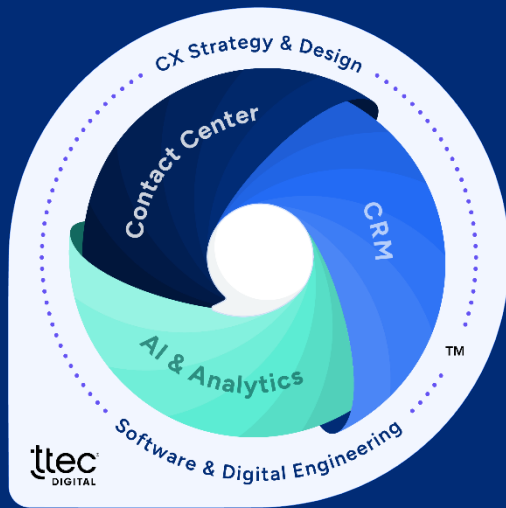
The migration of millions of customer records to Dynamics 365 CI transformed the client's marketing operations globally. The new Microsoft platform significantly improved campaign efficiency, data compliance capabilities, and cost structure, while providing scalability for future growth. The client was able to consolidate marketing campaigns across multiple global brands, improving efficiency and campaign execution speed. They also improved marketing journey



tracking through accurate KPIs and real-time insights.

"TTEC Digital, together with our internal team, delivered the project on schedule and within budget with exceptional partnership throughout the process. Their expertise in navigating complex migrations while maintaining business continuity was invaluable. The new Microsoft platform has significantly synchronised our marketing campaign structure globally and streamlined our cost structure, while giving us the scalability we need for future growth."

- Global Digital Director



About TTEC Digital

TTEC Digital is a global leader in customer experience orchestration, combining technology and empathy at the point of conversation. Today customer conversations, and the contact centre technologies that support them, are inseparable. We bring decades of innovation experience across the world's leading contact centre technology platforms – and blend it with in-house expertise in CX strategy, data and analytics, AI and more – to help organisations maximise their technology investments and create truly exceptional customer experiences.

Contact Us

Wayne Kay

Vice President, EMEA

Email: gcloud@ttecdigital.com

Website: www.ttecdigital.com