



G-Cloud 15 Service Definition

ElasticCX Contact Centre as a Service (CCaaS) - IP Integration



Craig Farley
IP Integration
January 2026



Contents

1. Introduction	4
1.1. Company Overview	4
1.2. Value Proposition.....	4
1.3. What the Service Provides	5
1.4. Social Value.....	5
1.5. Kickstart Economic Growth	5
1.6. Make Britain a Clean Energy Superpower.....	6
1.7. Break Down Barriers to Opportunity	7
1.8. Overview of the G-Cloud Service	7
1.9. Associated Services	9
1.10. ElasticCX Licence Tiers – Inclusions	9
1.11. Pricing	13
2. Data Protection.....	14
2.1. Information Assurance	14
2.2. Data Back-Up and Restoration.....	14
2.3. Business continuity statement/plan.....	15
2.4. Privacy by Design	17
3. Using the service.....	18
3.1. Ordering and Invoicing.....	18
3.2. Availability of Trial Service	19
3.3. On-Boarding, Off-Boarding, Service Migration, Scope etc.	19
3.4. Training	22
3.5. Implementation Plan.....	22
3.6. Deployment Overview	23
3.7. Service Management.....	24
3.8. Service Constraints.....	25
3.9. Service Levels	27
3.10. Outage and Maintenance Management	28
3.11. Financial Recompense Model for not Meeting Service Levels	29
4. Provision of the service.....	29
4.1. Customer Responsibilities	29
4.2. Technical Requirements and Client-Side Requirements	30
4.3. Outcomes/Deliverables	32
4.4. Development life cycle of the solution	33
4.5. After-sales Account Management	33
4.6. Dedicated Account Management Structure	34

- 4.7. Relationship Management & Communication 34
- 4.8. Ensuring Customer Satisfaction..... 34
- 4.9. Growing the Partnership 35
- 4.10. Long-Term Retention 35
- 4.11. Outcomes for the Client 35
- 4.12. Termination Process 35

- 5. Our experience 36
- 5.1. Case Studies 36
- 5.2. Clients 37
- 5.3. Contact Details..... 37

DOCUMENT TITLE: G-Cloud 15 Service Definition

SECURITY CLASSIFICATION: Confidential

AUTHOR: Craig Farley



DATE: 04/12/2025

AUTHOR	SUMMARY OF CHANGES	VERSION	DATE
Craig Farley	Templated	1.0	04/12/2025

CONTACT

HEAD OFFICE
Integration House
Turnhams Green Business Park
Pincent's Lane
Reading, Berkshire
RG31 4UH

MANCHESTER
Level 5, Fourways
51 Hilton Street
Manchester
M1 2EJ

LONDON
Level 3
28 Commercial Street
London
E1 6LS

Tel: 0118 918 4600

Tel: 0161 241 9600

Tel: 0207 496 8000

DISCLAIMER

This document contains confidential information about IP Integration Ltd. No part of its contents may be used, copied, disclosed or conveyed to any other party in any manner without the prior written permission from IP Integration Ltd.

This document is stored and maintained electronically. If any doubt exists as to the current version of the printed copy, reference should be made to the Document Owner/ Manager for verification. Proposed changes must also be sent to the Document Owner.

All intellectual property contained within this document remains solely the property of IP Integration Ltd and cannot be copied, disclosed, or conveyed to any other party in any manner without the prior written permission from IP Integration Ltd.

1. Introduction

1.1. Company Overview

IP Integration (IPI) is a UK-based provider of advanced Contact Centre solutions, focused on transforming customer experience and operational efficiency. IPI have been delivering complex CCaaS solutions to organisations for over 23 years. During this period, IPI have become experts in cloud contact centre migrations, something we have been delivering since the inception of cloud contact centre technology. Leveraging cloud platforms, AI, and secure IT services, IPI enables organisations to deliver exceptional customer contact. Our offerings include Cloud Contact Centres, AI-driven automation, unified communications, speech and text analytics, secure payment systems, and workforce engagement tools.

IPI also provides consultancy, customer success management, managed services, and training to ensure clients maximize the value of their technology investments. Our bespoke development team specialises in integrating systems of record with communication systems, tailoring solutions to meet specific client needs.

Support is delivered through UK-based Network Operation Centres, offering 24/7 incident management, proactive monitoring, and ITIL-based problem resolution.

IPI emphasizes a people-first culture, ranking #18 in the 2024 Best Companies to Work For (mid-sized category), and promotes transparency, wellness, and collaboration.

1.2. Value Proposition

Public Sector Challenges

Why it matters: Government reviews¹ find a significant portion of public services are still supported by outdated IT, which blocks digital transformation and AI adoption. Public sector organisations are increasingly expected to deliver a broader range of citizen services while operating under tighter budget constraints. Many contact centres still rely on legacy infrastructure and fragmented systems, which limit data interoperability and slow down service delivery. High inbound volumes, limited automation, and low digital channel adoption contribute to long queue times and advisor burnout. These inefficiencies negatively impact both user satisfaction and workforce retention.

1. State of digital government review, Jan 2025

IPI's Technical Response

IP Integration (IPI) provides cloud-native, AI-enhanced contact centre platforms designed to modernise service delivery. Our solutions integrate voice, chat, email, and self-service channels into a unified architecture, enabling seamless omnichannel engagement. AI-driven automation handles repetitive tasks and triages queries, reducing advisor load and improving first-contact resolution rates. Secure payment processing and compliance-ready infrastructure ensure data protection and regulatory alignment.

Operational Impact

By enhancing both customer and advisor experiences through intelligent routing, real-time analytics, and workforce engagement tools, IPI helps organisations achieve better service outcomes and improve staff retention. Their managed services and consultancy offerings

support smooth migration from legacy systems, optimise operational costs, and enable scalable service delivery—even within constrained public sector budgets.

1.3. What the Service Provides

ElasticCX CCaaS is a cloud-native contact centre solution designed with a multitenant microservices architecture, eliminating the need for costly on-premise infrastructure. It is user-friendly and leverages cloud-native technology for quick access and reduced IT burden and low total cost of ownership (TCO). The platform offers a comprehensive set of call centre features suitable for organisations of any size, delivering a customisable and scalable solution within the Azure Cloud. It enhances flexibility and scalability, ensuring seamless customer service, improved advisor focus, and productivity through modern contact centre features and native AI add-ons. As part of the Elastic CX CCaaS platform license offering IPI also include a fully managed service, and SIP trunking for all users as standard for all license tiers.

ElasticCX CCaaS provides three different contact centre options based on feature requirements and purchased licences. It operates in the UK with two multi-tenanted "Bands," which are logical aggregations of open-source components managed by a closed-source orchestration controller. Compute and data are hosted within "tenants," allowing multiple customers to be served on the same platform. Each region has a single "Band" deployed into at least two availability zones, ensuring high availability and resilience against Azure region failures. Additionally, the ElasticCX platform is secure by design, using highly available, geo diverse architecture enabling UK data sovereignty and GDPR compliance.

The system includes multiple built-in security roles with distinct permissions, such as system administrator, administrator, manager, and ACD user. Call recording is standard, with options to record calls as a percentage of queue interactions or entirely, and recordings can be stored locally or externally.

1.4. Social Value

Our Chief People Officer, Lisa Fradin is responsible for driving our People and CSR initiatives and this is something that IPI are passionate about. Some of our general activities and goals that we already work towards in this area are listed below and we are always looking for new opportunities to increase these with suitable partners.

1.5. Kickstart Economic Growth

SMART Objective:

Deliver 5 career mentoring opportunities annually through our partnerships with UK Youth and Leap by Q4 2026. Bring on board >2 early careers employees within 12 months of contract delivery.

Initiatives:

- Hiring of Early Careers employees - apprentices and graduates from local colleges and universities
- Provide mentoring opportunities for young people
- Participation in university hackathons and tech events

- Internal soft skills and leadership development programme: Evolve & Rise (early careers)

Metrics & Monitoring:

- Mentoring opportunities completion rates
- No. early careers hires - >2
- Participation rates in skills development programmes - Satisfaction score 8+

Governance & Stakeholders:

- Lisa Fradin, People Experience Director
- CSR Committee
- Social Value Champions

Government Alignment:

Supports NPPS goals for economic growth, SME engagement, and local job creation.

1.6. Make Britain a Clean Energy Superpower

SMART Objective:

Reduce operational carbon footprint by 10% year-on-year, aligned with IPI's Net Zero 2050 commitment, with verified reporting by Q4 each year.

Initiatives:

- Annual carbon footprint analysis
- ISO14001:2015 Environmental Management accreditation
- Sustainable resource usage and waste reduction
- Supplier sustainability partnerships

Metrics & Monitoring:

- Annual carbon audit reports
- Energy consumption tracking
- Supplier sustainability assessments
- Third-party environmental audits

Governance & Stakeholders:

- Lisa Fradin, Carbon Reduction Plan Owner
- People Team

Government Alignment:

Directly supports Net Zero targets outlined in PPN 06/21.

1.7. Break Down Barriers to Opportunity

SMART Objective:

Deliver Diversity & Inclusion training to 100% staff by Q3 2026, with a minimum of 1 hour of training per employee annually.

Initiatives:

- Mandatory certified HR training
- Monitoring of Inclusive recruitment and development practices
- Monitoring of internal view of D&I practices

Metrics & Monitoring:

- Training completion rates
- People Team involvement and oversight of all hires
- Bi- Weekly monitoring of internal view of D&I practices through engagement platform: Officevibe

Governance & Stakeholders:

- Lisa Fradin, Chief People Officer
- HR Director and Diversity & Inclusion Lead
- D&I Working Group

Government Alignment:

Supports NPPS objectives for social mobility, inclusive workforce development, and equal opportunity.

1.8. Overview of the G-Cloud Service

The ElasticCX CCaaS platform offers an extensive range of call centre capabilities, designed to accommodate organisations of any size. Our cloud-based solution, hosted on Microsoft Azure, ensures a highly customisable and scalable platform that meets diverse operational needs.

At the core of the ElasticCX CCaaS solution is our Advanced Call Distribution (ACD) system, which intelligently routes interactions via Interactive Voice Response (IVR) systems. These interactions are omnichannel, encompassing not just phone calls, but also emails, web chat, SMS, and more. This ensures seamless communication across all customer touchpoints.

Key Service Capabilities:

- **Comprehensive Voice Features:** Includes desktop, browser, and mobile app access, preview dialler, unlimited auto-attendants, phone numbers, extensions, queues, in-queue callbacks, real-time and historical reporting, call recording, call forwarding, call filtering, conference bridge, custom greetings, and more.
- **Omnichannel Support:** Offers integration with various communication channels—voice, chat, email, SMS, and social media—providing a cohesive customer interaction experience.

- **Advanced Interaction Routing and Management:** Native IVR set-up, queue management capabilities and AI-powered interaction routing enables you to connect customers efficiently with the right team or self-service tools, whilst offering complete control to adjust the contact centre according to your business needs.
- **Real-Time Analytics and Reporting:** Provides actionable insights through live dashboards and detailed analytics, enabling businesses to optimise customer experiences.
- **Platform Reliability:** Built on a robust cloud infrastructure, ensuring resiliency and a 99.99% uptime SLA for uninterrupted operations.
- **Scalability:** Seamlessly handles high contact volumes typical of peak demand scenarios, maintaining performance without compromise.
- **Customisation for Unique Business Needs:** Flexible API architecture supports out of the box plug-ins to meet specific workflows such as Workforce Management, CRM and collaboration integrations, further enhancing operational efficiency.

Microservices Architecture and Resilience:

ElasticCX is built on a microservices architecture within Microsoft Azure, offering a distributed and loosely coupled environment. This design ensures that the failure of one component or microservice does not impact the entire application stack. The microservices architecture enhances the platform's ability to scale dynamically according to demand, such as automatically allocating additional compute resources during spikes in interactions. The platform operates across two main Availability Zones in different Azure UK Zones (UK West and UK South), maintaining UK data sovereignty. Each zone includes multiple multi-tenant applications that provide redundant access to voice, omnichannel, and chat infrastructure. This setup ensures fault tolerance, redundancy, and scalability to maintain uninterrupted Client to Customer communication.

Business Benefits:

- **Streamlined Operations:** Advanced automation reduces manual tasks, allowing teams to focus on high-priority customer interactions. Intelligent call routing minimises wait times and resolution times.
- **Enhanced Customer Experience:** Omnichannel communication ensures seamless customer engagement across preferred channels. Real-time analytics and sentiment analysis enable proactive issue resolution and personalised service delivery.
- **Scalable Solutions:** The platform's ability to quickly scale accommodates fluctuating demand, ensuring continuity and performance during peak times. Customisable features align with unique workflows and customer service objectives.
- **Native AI-Driven Capabilities:** Empower advisors to deliver consistent service quality during high-demand periods, optimise first-contact resolution rates, reduce average handle time and after call work using real-time transcription with summary, sentiment and suggested next actions and dispositions.

Customer Benefits:

- A leading global educational resources supplier realised £49K annual TOC saving benefits.

- Leveraged the platform's 'Build Your Own Database' feature to automatically generate reports that are fully accessible in Power BI, along with streamlined daily reporting processes.
- Resulting in their advisors being better equipped to address customer enquiries and orders.

ElasticCX combines reliability, scalability, and advanced functionality to deliver outstanding performance, even during high-demand periods, ensuring increased efficiencies and improved customer service.

1.9. Associated Services

ElasticCX offers a versatile Contact Centre as a Service platform with three primary contact centre licence tiers and one unified communication (back-office user) licence tier.

1.10. ElasticCX Licence Tiers – Inclusions

Core Inclusions Across All Tiers:

- **SIP Trunking & Call Charges:** This includes the necessary SIP trunking facilities for handling voice communications within the contact centre.
- **Cloud Storage for Recordings:** Secure cloud storage for call recordings is included.
- **Full Managed Services:** Comprehensive managed services covering updates, maintenance, and support.
- **Security & Compliance:** Our platform is ISO and GDPR compliant and hosted on UK Azure regions ensuring industry standard security and UK data sovereignty.
- **Single Sign-On (SSO):** Facilitates seamless access using existing credentials.
- **Cloud-Native Deployment:** No hardware is needed as the platform is entirely cloud-based.

Tier Highlights

ECX Voice

- **Ideal For:** Voice-centric contact centres.
- **Features:** Includes inbound/outbound voice, IVR, call-backs, voice campaigns, and outbound preview/progressive dialling.
- **Resources Provided:** 1500 UK local/national/mobile* minutes/month and 30GB storage per advisor.

ECX Omni

- **Ideal For:** Centres needing both voice and digital channels.
- **Features:** All ECX Voice features plus omnichannel support including voice, SMS, email, webchat and social channels.
- **Resources Provided:** Same as ECX Voice (1500 minutes, 30GB storage).

ECX Max

- **Ideal For:** Centres focused on advanced omnichannel and AI-driven interactions.

- **Features:** Includes all ECX Omni features, social channels, chatbots, and a native AI suite comprising AI Sidekick for advisor assistance, includes real-time transcription, summary, sentiment, topic and suggested actions and dispositions, additional AI insights package offers post interaction transcription, AI Score Assist and AI sentiment and topic analysis.
- **Resources Provided:** Same as ECX Omni (1500 minutes, 30GB storage).

ECX UCX

- **Ideal For:** Back-office connectivity.
- **Features:** Includes Find Me/Follow Me, desktop/browser softphone.
- **Resources Provided:** 300 UK local/national/mobile* minutes/month.

*Mobile minutes are restricted to the main UK carriers (currently VMO2, VodafoneThree, EE), all other mobile carriers will be charged at the standard IPI SIP Tariff rate. UK 01xxx/02xxx numbers.

Not Included

- **Licence Overage:** Additional charges apply for usage beyond the allocated resources.
- **Professional Services & Consultancy:** Services like API integrations and tailored deployment packages are not included.
- **Bolt-on Features:** Extras such as social channels or AI for the ECX Voice and ECX Omni licence tiers.
- **Workforce Engagement Management:** Separate offerings are available for workforce management needs.
- **AI Usage Charges:** Fees for real-time or post-call transcription and bot usage.
- **Cloud PCI for Secure Payments:** This requires separate arrangements.

For detailed costs and rate structures, please refer to our rate card/pricing documentation.

Licensing Detail

Capability	ECX Voice	ECX Omni	ECX Max
Voice	●	●	●
Voicemail	●	●	●
E-mail		●	●
Chat		●	●
SMS		●	●
Social (Facebook, WhatsApp)		●	●
Intelligent Routing	●	●	●
Contact Bundling		●	●
IVR - Automatic speech recognition (ASR)		●*	●*
IVR - DTMF	●	●	●
Text-to-speech (TTS)	●	●	●
Preview Dialer	●	●	●
Agentless Preview Dialer	●	●	●
AI Powered Bots (Chat & Voice)			●
Recording	●	●	●

Quality Management		●	●
Post Interaction Survey	●	●	●
Post-call transcription			●
Post-call sentiment analysis			●
Schedule callback	●	●	●
Schedule follow-up	●	●	●
Workforce Management	○	○	○
Mobile Application	●	●	●
Desktop Application	●	●	●
Screen Pop	●	●	●
Team Presence & IM	○	○	○
Quick Texts		●	●
CRM Integration	○	○	○
Single Sign On		●	●
Monitoring/Coaching/Whispers		●	●
Real-time Reporting		●	●
Historical Reporting		●	●
Advanced contact routing		●	●
Speech Analytics	○	○	○
AI Bot/AI - Chargeable add on			
AI Insights	○	○	●
AI Sidekick	○	○	●
AI Autopilot		○	●
Google CCAI Products			
CCaaS inclusive	○*	○*	○*
Liveperson Bot CX	○*	○*	○*
Agent Assist RT (agent assistance)	○*	○*	○*
Cloud PCI			
Agent Pay	○	○	○
Agent Pay by Link	○	○	○
IVR Assist	○	○	○
Pauseable (Automated PCI)	○	○	○

○ = Optional Add-on

● = Included in license

○* = Requires integration to Google CCAI account

Capability	ECX UCX
Phone number included	●
Extension included	●
Auto-attendants	●
Local & International Dialling	●
Auto-provision hard phones (Yealink)	●
Call Recording (if required)	●
Call Forwarding	●
Call Filtering	●
Caller ID	●
Conference Bridge	●
Office Hours and Rules	●
Ring-All and Hunt Groups	●
Dial Plans	●
Dial-by-name Directory	●
Desktop HW phone, Browser softphone	●
Do Not Disturb	●
Hot Desking	●
Presence Monitoring	●*
Call Monitoring - Coach, Barge & Monitor	●
Virtual Voicemail	●
Internal Messaging	●
SMS	●
Find Me / Follow Me (Station settings)	●
Advanced Call Flows	●
Historical Reporting	●

○ = Optional Add-on

● = Included in license

* = Limited- No presence on physical handset and softphone is limited

Whilst the platform is designed to be user-friendly, allowing organisations to adopt many features themselves as desired, it is expected that some startup services from IPI will be needed for implementation, depending on requirements. We offer free guidance and recommendations to ensure the optimal solution design. Extra professional services to deploy additional features can be purchased as needed - see our pricing document.

Support services are included in the licence price.

Service Delivery Management is available as an optional extra. For detailed costs and rate structures, please refer to our rate card/pricing documentation.

The platform includes generous fair usage allowances for items such as APIs, Storage etc. and are allocated based on licence type. We offer free guidance around these elements as part of our solution design.

We provide, but do not charge for client management services - your client manager is there to ensure we build a strong partnership together and acts as your first port of call in the relationship.

We provide, but do not charge for customer success management services - your customer success manager is there to ensure you get the maximum value from the solution. They will build a success plan to achieve any objectives through best practise adoption of the ECX platform and provide ongoing guidance.

1.11. Pricing

For detailed costs and rate structures, please refer to our rate card/pricing documentation.

2. Data Protection

2.1. Information Assurance

Security Accreditations and Certifications:

- **IPI Accreditations:** ISO 27001, Cyber Essentials, ISO 9001, ISO 14001.

Processes and Facilities for Secure Information Management:

- **Hosting and Infrastructure:** IPI utilises Azure Cloud services to host the ECX CCaaS solution. Azure Cloud offers high service availability and robust physical and environmental security controls through Microsoft's data centre facilities. Azure holds various accreditations, including ISO 27001, ISO 27017, CSA STAR, and SOC 2 Type 2 reports.

Security Measures and Policies:

- IPI employs multiple layers of security to protect its premises, assets/systems, networks, and ultimately company and client information. These measures include, but are not limited to:
- Firewalls with Intrusion Prevention Systems (IPS)
- Anti-malware controls
- Managed XDR (Extended Detection and Response) capabilities
- Vulnerability management processes with regular scanning and penetration testing
- Backup policies and procedures
- Multiple layers of redundancy in physical hardware and network connections
- Physical and logical access controls
- Data loss prevention tools

These measures ensure comprehensive security and compliance with industry standards.

2.2. Data Back-Up and Restoration

Data Loss Protection Plans, Processes, and Systems

IPI is ISO27001, ISO14001, ISO9001 and Cyber Essentials certified, ensuring robust security governance aligned with international standards. We have comprehensive plans and regularly test our Business Continuity (BC) and Disaster Recovery (DR) systems for both internal and external services.

The ECX CCaaS platform is hosted on Microsoft Azure, offering a secure by design and resilient infrastructure. Compute and data (excluding integrations) are hosted with segregation called 'tenants' allowing multiple customers to be served within the same multi-tenanted platform.

As each band is deployed into different Azure regions, they are considered to be different fault domains and provide resilience against an Azure region failure.

Our Business Continuity Plans (BCPs) and Incident Response Plans (IRPs) are documented and undergo regular testing. Additionally, our ElasticCX platform undergoes annual CREST-certified pen testing.

Backup Strategy

Daily automated backups are conducted for all virtual servers using Azure Recovery Vault. Backups are retained as follows:

- Daily backups: retained for 7 days
- Weekly backups: retained for 4 weeks

These backups are encrypted and stored in geographically redundant locations within the UK South and UK West Azure regions.

User Control Over Backups

While backup schedules and scope are managed by IPI to ensure consistency and compliance, we offer flexibility for client-specific requirements. These can be discussed prior to order placement and will be documented in the Order Form as agreed.

Review, Update, and Testing

Our backup processes are part of our formal risk management and governance reviews. Regular exercises are conducted to validate the effectiveness of our Incident Response Plans and BCPs. We perform vulnerability scanning, penetration testing, and continuous monitoring to maintain security and resilience.

Client-Specific Requirements

We welcome discussions on bespoke backup or resilience needs during pre-order consultations. Any agreed-upon requirements will be documented in the Order Form and implemented accordingly.

2.3. Business continuity statement/plan

Scope of the Plan:

The Business Continuity Plan (BCP) encompasses all services provided, ensuring operational continuity during disasters or significant disruptions. It aims to mitigate risks, offer consistent support during project delivery and go-live, and guarantee the delivery and maintenance of all contracted services.

Key Business Areas & Critical Functions:

The key business areas include service delivery, support, account management, and technical operations. Critical functions involve the availability of the ECX CCaaS platform, user access, incident management, and ongoing support services.

Dependencies Between Business Areas and Functions:

There are interdependencies among project management, service delivery, support engineering, and client operational teams. Seamless communication and collaboration between these areas are crucial for uninterrupted service continuity. Stakeholder engagement

and relationship building are emphasised throughout the transition and business-as-usual phases.

Acceptable Downtime for Each Critical Function:

- **Critical system failure (ECX CCaaS unavailable):** Response within 30 minutes, resolution within four hours, 24/7 support.
- **High priority issues:** Response within one hour, resolution within eight hours, 24/7 support.
- **Medium priority:** Response within four hours, resolution within 12 hours, business hours support.
- **Low priority:** Response within four hours, resolution within five days, business hours support.

Outline Plan to Maintain Operations:

ElasticCX is hosted on Microsoft Azure with a microservices architecture, ensuring high availability and disaster recovery. The platform operates across two UK-based availability zones for redundancy and data sovereignty. In case of a component failure or disaster, the system automatically reallocates resources to maintain service continuity. Regular monitoring, early life support post go-live, and ongoing service reviews ensure continued operational stability.

Plans, Processes, and Systems for Protecting Against Data Loss:

The ECX CCaaS platform is hosted within Microsoft Azure, leveraging its multi-region, multi-availability zone architecture for geo-diverse redundancy. Each region operates as a separate fault domain, ensuring resilience against regional failures. The platform is designed with high availability, logical tenant segregation, and secure orchestration layers, underpinned by ISO 27001 governance and robust security controls.

Key measures include:

- **Resilient Architecture:** Multi-zone deployment with redundant network paths and supplier diversity.
- **Data Encryption:** All data at rest and in transit is encrypted using TLS 1.2+ and Azure-managed keys.
- **Secure by Design:** Formal change control, least privilege access, and MFA enforced across all systems.

Backup Strategy:

- **Frequency:** Daily automated backups are performed using Azure Recovery Vault, with retention policies of 7 daily and 4 weekly backups across UK South and UK West regions.
- **Scope:** Backups include virtual servers and critical configuration data.
- **Storage:** Backups are encrypted and stored centrally to maintain data integrity and confidentiality.
- **Additional Storage:** Call recordings and media files benefit from allocated storage (30GB per committed license) within Azure Blob Storage, encrypted with service-managed keys.

User Control Over Backups:

Backup schedules and strategies are centrally managed by IPI to ensure consistency and compliance. End-users do not directly control backup operations; however, client-specific requirements can be agreed during pre-order discussions and documented in the Order Form. Additional storage or bespoke retention policies can be scoped as part of the implementation process.

Review, Update, and Testing of Processes:

- Backup and resilience processes are reviewed as part of formal risk management and ISO 27001 audits.
- Vulnerability scanning (monthly external, continuous internal), annual penetration testing, and proactive threat monitoring ensure ongoing security posture.
- Business Continuity Plans (BCPs) and Incident Response Plans (IRPs) undergo regular exercises, and lessons learned from incidents are documented and applied to improve processes.

Additional Service-Level Enhancements:

- **Availability SLA:** 99.99% platform availability target.
- **Incident Management:** Defined response and restoration targets (e.g., 30-minute initial response, 4-hour restoration for Severity 1 issues).
- **Root Cause Analysis:** Provided for critical incidents within 20 working days.
- **Change Control:** All configuration changes approved and tracked via the Client Portal.
- **Proactive Monitoring:** 24/7 Service Desk support and real-time alerting.

Client Engagement:

Specific requirements can be discussed prior to order placement and documented in the Order Form as agreed between both parties. This ensures alignment with client expectations and compliance obligations.

Summary: ECX CCaaS combines robust Azure-based architecture, automated encrypted backups, ISO 27001 governance, and proactive monitoring to deliver a secure, resilient service. Backup processes are centrally managed but customizable through pre-order agreements, and all procedures are regularly reviewed and tested to maintain compliance and effectiveness.

A more detailed plan can be provided to the buyer on request.

2.4. Privacy by Design

To ensure compliance with the GDPR, the ECX CCaaS platform, hosted on Microsoft Azure, incorporates privacy by design principles from the ground up. Here's how we proactively address privacy and align with GDPR requirements:

1. **Data Protection and Access Control:** Only authorised personnel with the necessary privileges can access data. All client data is treated as confidential, and IPI acts as a processor for ECX CCaaS data. Regular Data Protection training is provided to all staff to ensure data is handled correctly.

2. **Secure Architecture:** The platform is designed for high availability with a geo-diverse architecture, ensuring resilience and data sovereignty. It operates within multiple Azure regions, with each region functioning as a separate fault domain.
3. **Data Encryption:** All data in transit and at rest is encrypted using TLS 1.2 or higher and Azure-managed keys, safeguarding against unauthorised access.
4. **Backup and Disaster Recovery:** Daily automated backups are conducted using Azure Recovery Vault, with a retention policy that includes 7 daily and 4 weekly backups. Data can be swiftly restored within five minutes if required, ensuring data integrity and availability.
5. **User Rights and Data Management:** The platform supports GDPR requirements such as the right to be forgotten and compliance with Subject Access Requests. Robust processes are in place to assist with GDPR identification and corrections.
6. **Compliance and Governance:** The platform complies with ISO 27001 standards, ensuring robust security measures are in place. Regular audits and risk assessments are conducted to maintain compliance with GDPR and other data protection regulations.
7. **Security and Privacy Certifications:** As part of Microsoft Azure's compliance, the platform benefits from adhering to international standards such as ISO/IEC 27018 for cloud privacy and data protection.

By integrating these features, ECX CCaaS ensures that privacy is a fundamental part of the design and operation of our services, aligning with GDPR mandates for protecting personal data from the outset.

3. Using the service

3.1. Ordering and Invoicing

We recognise that although Elastic CX CCaaS is designed to be used as an 'off-the-shelf' solution, its capabilities are very wide-reaching. Therefore, we would follow up with consultations to discuss what potential clients are trying to achieve and jointly scope the best mix of services, licences, and features to optimise benefit vs cost.

We then provide a detailed proposal and statement of works, checking that they meet your needs before progressing to the contract stage.

Once the contract is signed, there will be a ramp period allowed for the implementation of the Elastic CX solution

Clients will then be invoiced according to their payment profile e.g. annually in advance:

Annual In Advance

- IPI will invoice the client for the Elastic CX licences at the start of the Go Live Period.
- Thereafter, IPI will invoice the client for the Elastic CX licences on a 12 month in advance basis until the end of the Primary Contract Term

Monthly In Advance

- IPI will invoice the client for the Elastic CX licences at the Go Live Period. The invoice will cover the first month of Elastic CX licencing
- Thereafter, IPI will invoice the client for the Elastic CX licences on a monthly in advance basis until the end of the Primary Contract Term

Anyone wishing to discuss our services can contact IPI via enquiries@ipintegration.com. Please use 'G-Cloud 15' as the subject field.

3.2. Availability of Trial Service

We provide interested buyers with a PoV (Proof of Value) of the ElasticCX CCaaS platform. This is a minimum solution fit CCaaS that demonstrates core features with tailored configuration of IVR and queues. We also offer trials of the AI add-ons such as the AI Sidekick and AI Insights feature packs, with a tailored approach to understand their success criteria and get them set up and running with the aim to demonstrate how ECX can fit their operational and success criteria needs.

3.3. On-Boarding, Off-Boarding, Service Migration, Scope etc.

Onboarding Process Overview

IPI follows a structured, consultative onboarding methodology designed to ensure a smooth transition and rapid adoption of the CCaaS solution. Our approach combines **project governance, technical enablement, and customer success planning**.

1. Kick-Off Meeting

- **Customer Kick-Off Session:**
A formal meeting with key stakeholders to review the solution, deliverables, timelines, and governance structure.
- **Agenda Includes:**
 - Roles and responsibilities
 - High-level project plan
 - Communication and escalation paths
 - Success criteria and KPIs

2. Dedicated Team Assignment

- **Customer Success Manager (CSM):**
Acts as a strategic advisor throughout the contract lifecycle, driving adoption and business outcomes.
- **Service Delivery Manager (SDM):**
Oversees service performance, SLA adherence, and monthly reviews.
- **Account Manager:**
Responsible for commercial engagement and alignment with contractual obligations.
- **Technical Experts:**
Certified engineers and Solution Architects for configuration, migration, and optimisation.
- **Training & Enablement Lead:**
Delivers tailored training programs and knowledge transfer.

Support is not limited to the first 90 days; assistance continues throughout the contract term under our managed service model.

3. Documentation Provided

- **Customer Detail Workbook (CDW):** Captures all solution requirements and configuration details.
- **Operations Manual:** Includes escalation matrix, contact points, and support procedures.

4. Training & Enablement

- **Role-Based Training:** For administrators, supervisors, and advisors.
- **Train-the-Trainer Model:** Empowers internal champions.

5. Set-Up & Migration Support

- **Technical Workshops:** Define features and functionality.
- **Configuration & Testing:** System Integration Testing (SIT), System Acceptance Testing (SAT), and User Acceptance Testing (UAT).
- **Go-Live Support & Hypercare:** Dedicated engineers available during transition to ensure stability.

6. Account Management & Continuous Improvement

- **Monthly Service Reviews:** SLA performance, incident trends, and improvement opportunities.
- **Quarterly Business Reviews:** Strategic alignment and roadmap planning.
- **Customer Dashboards:** Real-time visibility of SLA performance and ticket status.

Optional On-Site Engagement

On-site visits can be arranged for critical phases such as kick-off, training, or go-live support, subject to client requirements. For detailed costs and rate structures, please refer to our rate card/pricing documentation.

We ensure a structured, secure, and compliant off-boarding process, involving notice management, planning, data export, access removal, and documentation. Our activities adhere to GDPR and ISO 27001 standards, with optional migration support available. Knowledge transfer sessions can be arranged to ensure the client is fully informed on system configurations and integrations, facilitated by a Service Transition Manager to ensure a smooth exit.

1. Notice of Termination

- Buyers must provide written notice of termination as per the contractual terms. Upon receipt, we initiate the off-boarding process.

2. Engagement & Planning

- A formal off-boarding kick-off meeting is held with client stakeholders to:
 - Confirm termination timelines.
 - Define the scope of data migration and any bespoke requirements.
 - Agree on roles, responsibilities, and communication channels.
 - A transition plan is documented, detailing milestones and dependencies.

3. Timeframe & Governance

- The typical off-boarding timeframe is agreed upon during the planning phase, considering:
 - Volume of data to be exported.
 - Complexity of integrations.
 - Client resource availability.
 - Governance includes weekly progress updates and escalation paths for any issues.

4. Data Export & Migration Support

Clients are given secure access to export their data, including call recordings, interaction logs, and configuration data. Data is delivered in agreed formats (e.g., CSV, encrypted archives) via secure transfer mechanisms. We can provide technical assistance for migration to a new platform if needed.

5. Service Access Removal

After data export is confirmed, user accounts and administrative access are deactivated in a controlled manner. Multi-Factor Authentication (MFA) and Single Sign-On (SSO) credentials are revoked, and all residual data is purged in compliance with GDPR and ISO 27001 standards.

6. Documentation & Handover

Clients receive:

- Final Service Report summarizing off-boarding activities.
- Confirmation of data deletion and compliance with retention policies.
- Updated Operations Manual noting closure procedures.

7. Optional Support

- **Hypercare Period:** Optional short-term support post-off boarding for technical queries.
- **Consultancy Services:** Assistance with migration strategy or integration with new systems.

IPI offers additional services for an extra cost, including the provision of a bespoke exit plan. We work closely with clients to tailor a customised exit strategy that suits their specific needs. This service includes:

- **Notice of Termination:** Clients must provide written notice as per contractual terms. An assigned Service Delivery Manager (SDM) oversees all off-boarding activities.
- **Engagement & Planning:** We conduct a formal off-boarding kick-off meeting to confirm termination timelines, define data migration scope, and agree on roles and responsibilities. A detailed transition plan is documented.
- **Timeframe & Governance:** The off-boarding timeframe is customised based on data volume, integration complexity, and client resource availability. Governance includes regular updates and issue escalation paths.
- **Data Export & Migration Support:** Secure data export is facilitated, with optional technical assistance for migration to new platforms.

- **Service Access Removal:** User accounts and access are deactivated post data export, ensuring GDPR and ISO 27001 compliance.
- **Documentation & Handover:** Clients receive a final service report, data deletion confirmation, and an updated operations manual.
- **Optional Support:** We offer optional short-term support post-off-boarding and consultancy services for migration strategy or integration with new systems.

3.4. Training

We provide a comprehensive range of training facilities designed to ensure effective orientation and engagement with new services. Our flexible approach caters to various learning styles and skill levels, aligning with your strategies and goals. Our training methods include train-the-trainer, classroom-based learning, guided learning, and e-learning, utilising the client's platform environment where possible for real-world demonstrations and practice.

Our training services can be standalone or integrated to create a customised package. The training cycle includes:

1. **Analysis:** Identifying knowledge and skill gaps.
2. **Design:** Developing learning objectives and interventions.
3. **Deliver:** Executing training and evaluating in real-time.
4. **Monitor:** Providing ongoing support and refresher sessions.
5. **Evaluate & Evolve:** Measuring training outcomes and addressing ongoing needs.

During the discovery phase, we produce a training approach, course outlines, and scope of delivery. A full training schedule, including end-user training, go-live support, and knowledge transfer, is planned. Workshops confirm training requirements, content, delivery methods, and schedules, which can be delivered remotely or onsite.

Typically, a training programme includes live demonstrations, supporting materials like quick reference guides, e-learning materials and FAQs. We use a suite of tools including trainer-led sessions, customised user guides, FAQs, e-learning, and an online knowledge base with video guides.

For detailed pricing, please refer to our rate card/pricing.

3.5. Implementation Plan

The implementation of the ECX CCaaS solution follows a structured delivery approach, typically completed within **12 weeks**. The process is divided into five key phases:

1. **Initiate (Week 1)**
 - Conduct internal and customer kick-off meetings to review scope and deliverables.
 - Establish governance, roles, and responsibilities.
 - Prepare project documentation and high-level plan.
 - Identify stakeholders and set expectations for resource requirements.
2. **Discovery and Planning (Weeks 2–4)**

- Run technical workshops to define features and functionality.
- Validate configuration requirements and document them in the **Customer Detail Workbook (CDW)**.
- Analyse existing solutions and provide consultancy on best practices.
- Confirm delivery plan and schedule all activities.

3. Implement (Weeks 5–10)

- Configure all solution components and functionality.
- Perform system and integration testing (SIT/SAT).
- Monitor progress and provide reporting.
- Enable support and knowledge transfer.
- Conduct user acceptance testing and execute training, including “Train the Trainer.”

4. Transition (Weeks 10–12)

- Ensure business readiness and complete pilot activities.
- Execute migrations and Go Live.
- Provide hypercare support and transition to managed services.
- Update operations manuals and BAU artifacts.
- Close project and capture lessons learned.

5. Evolve (Post Go Live)

- Deliver managed service reviews and continuous improvement.
- Support customer success management and adoption of new features.
- Conduct business reviews and evolve the solution roadmap.
- Drive organisational adoption and best practice.

3.6. Deployment Overview

The ECX CCaaS platform is a cloud-based, multi-tenant solution designed for resilience and scalability. Key components include:

- **Core Technologies:**
 - IVR: Omnichannel routing and self-service.
 - ACD: Intelligent interaction distribution across channels.
 - UC: Integrated voice and messaging.
- **Architecture & Security:**
 - Multi-region deployment with active-active configuration.
 - High availability through redundant bands in separate Azure zones.
- **Omnichannel Experience:**
 - Unified advisor interface for email, chat, SMS, and more.
 - Seamless customer journeys across preferred channels.

This methodology ensures a smooth transition from initiation to business-as-usual, delivering a fully operational and integrated contact centre solution.



Fig.1 - Visual representation of the default implementation stages when deploying Elastic CX CCaaS

Detailed implementation plans can be provided to the buyer on request.

3.7. Service Management

The service is meticulously managed as a fully hosted cloud solution, incorporating all upgrades and updates as part of the continuous service. Maintenance windows are scheduled to minimise disruption, ensuring necessary downtime for upgrades or maintenance is communicated in advance. The platform is designed for seamless updates and security maintenance without customer disruption, using automated patching and system management processes.

We adhere to an ITIL-aligned framework for managing the service, incorporating enterprise IT Service Management (ITSM) practices to maintain quality and consistency. Our Managed Services team is equipped with ITIL V4 Foundation Certification, supporting a comprehensive lifecycle of support including incident, major incident, and change management, all in line with ITIL processes.

Regarding service constraints, customisation is allowed within the cloud platform's capabilities. Any deprecation of features or functionality is pre-communicated through structured change and risk management processes. A Service Delivery Manager (SDM) and an Account Manager are assigned to support ongoing service delivery and improvement initiatives.

Service Management Overview

The ElasticCX CCaaS platform operates as a managed cloud service hosted within Microsoft Azure, supported by robust governance, ITSM principles, and ISO-certified processes to ensure high availability, proactive monitoring, and structured change control.

Service Constraints

- **Maintenance Windows:** Planned maintenance is communicated via the Platform Status Page, with advanced notifications to prevent simultaneous downtime across availability nodes.
- **Availability SLA:** The target availability is 99.99%, excluding planned or emergency maintenance.
- **Deprecation of Features:** Feature lifecycle management follows vendor roadmaps, with clients informed of depreciation schedules and provided with migration guidance.
- **Customisation Limits:** Customisation is within defined boundaries using configuration options and Service Tokens for MACD (Moves, Adds, Changes, Deletes). More complex integrations require a Statement of Work (SOW).
- **Geographic Usage:** Optimised for UK usage; remote access from other regions is supported but may introduce latency.

IT Service Management (ITSM) Standards

The service operates under an ITIL-aligned framework covering:

- **Incident & Problem Management:** Prioritised SLAs, such as P1 response within 30 minutes and restoration within 4 hours.
- **Change Management:** Formal approval process via the Client Portal.
- **Configuration Management:** Documented in the Customer Detail Workbook (CDW).
- **Root Cause Analysis (RCA):** Provided within 20 working days for Severity 1 incidents.
- **Ticketing & Escalation:** Managed through an enterprise ITSM platform with full audit trails, SLA tracking, and escalation paths.

Certifications

- **ISO 27001:** Information Security Management.
- **ISO 9001:** Quality Management.
- **ISO 14001:** Environmental Management.
- **ITIL Foundation Certified Personnel:** All service management staff and engineers follow ITIL best practices.

Continuous Improvement

- Monthly Service Reviews and Quarterly Business Reviews ensure alignment with client objectives.
- Proactive monitoring and trend analysis contribute to a Continuous Service Improvement (CSI) Register.

ElasticCX CCaaS is managed under strict ITSM and ISO frameworks, ensuring predictable service performance, structured change control, and compliance with industry standards. Clients benefit from transparent governance, proactive communication, and support from ITIL-certified teams.

3.8. Service Constraints

ElasticCX CCaaS offers high availability, robust Managed Service SLA-backed support, and flexible customisation within defined parameters. Release, maintenance and feature lifecycle management are transparent, with proactive communication to the customer base to ensure minimal disruption.

Performance & Availability

- **Target Availability SLA:** 99.99% for the ECX CCaaS platform, excluding planned or emergency maintenance windows.

Incident Response Times

- **Severity 1 (Critical):** Initial response within 30 minutes, restoration within 4 hours (24/7).
- **Severity 2 (High):** Response within 1 hour, restoration within 8 hours (24/7).
- **Severity 3 (Medium):** Response within 4 hours, restoration within 12 hours (Business Hours).

Support Hours

- **24/7 Support:** Available for critical incidents and major issues.
- **Business Hours Support:** Provided from Monday to Friday, 08:30–17:30 UK time, for standard requests and low-priority incidents.
- **Access:** Support can be accessed via telephone, email, and the client portal for ticket creation and tracking.

Maintenance Windows

- **Release updates:** The ElasticCX CCaaS platform follows a quarterly roadmapped upgrade schedule, where new customer accretive features are made available, either as a result of customer feature requests or planned roadmap items.
- **Scheduling:** Planned maintenance is scheduled outside peak business hours as standard procedure.
- **Impact:** Planned releases and maintenance is sequenced over the region bands ensuring full availability and fallback recovery as part release best practice.
- **Communication:** Notifications for Release upgrades and planned minor maintenance releases are provided to all customers on the platform, with additional options for webinars and new feature content made available. Platform daily status and incidents are published on the Platform Status Page.

Level of Customisation

- Permitted Customisations:
 - IVR flows, call routing, and channel setup via Flow Editor.
 - Integration with CRM and third-party applications using approved APIs.

- **Advanced Customisation:** Requires a Statement of Work (SOW) and may incur additional charges. This includes AI bot development and bespoke integrations.
- **Change Control:** All changes follow a formal Change Control Process and require client approval via the Client Portal.

Deprecation of Functionality

- **Process:** Feature deprecation follows the roadmap
- **Notification:** Clients are notified in advance via:
 - Roadmap Reviews during quarterly business reviews.
 - Updates published on the platform status and knowledge portals.
- **Alternatives:** Migration paths or alternative solutions are provided where applicable.

3.9. Service Levels

Service Levels Overview

We are committed to discussing and agreeing upon appropriate service levels prior to finalising any order. These service levels will be documented in the Order Form, reflecting the mutual agreement between both parties. Below is an overview of our standard service levels for incidents and service requests:

Incident Management

3.9.1.1. SEVERITY LEVELS AND RESPONSE TIMES:

Severity	Initial Response	Target Restoration	Applicable Hours
1 – Critical	30 minutes	Four hours	24/7
2 – High	One hour	Eight hours	24/7
3 – Medium	Four hours	12 hours	Business Hours (08:30 to 17:30, Monday to Friday, excluding bank holidays)
4 – Low	Four hours	Five days	Business Hours

3.9.1.2. INCIDENT CLASSIFICATIONS:

- **Critical:** System failures affecting all users or security breaches.
- **High:** Major disruptions affecting multiple users or services.
- **Medium:** Moderate disruptions with available workarounds.
- **Low:** Minor issues affecting individual users.

Service Request Management

3.9.1.3. CLASSIFICATION AND RESPONSE TIMES:

Priority	Initial Acknowledgement	Target Completion	Applicable Hours
Priority 1 - High	Four hours	Two business days	Business Hours
Priority 2 - Medium	Eight hours	Three business days	Business Hours
Priority 3 - Normal	Eight hours	Five business days	Business Hours

Service Credits

Service credits apply if the availability of ECX CCaaS falls below specific thresholds, provided the customer reports the incident at the time. Credits are as follows:

- < 99.99% - 99.9%: 5% of monthly recurring fees
- < 99.9% - 99.3%: 10% of monthly recurring fees
- < 99.3% - 98.85%: 15% of monthly recurring fees

We are open to customising these service levels to meet your specific needs and ensure they align with your business requirements.

3.10. Outage and Maintenance Management

To prevent technical issues from causing delays, we employ a multifaceted approach focusing on outage avoidance, performance planning, downtime measurement, and preparedness for ad-hoc service needs. Here's a detailed breakdown:

Outage Avoidance

Our platform is designed on a robust microservices architecture within Microsoft Azure, ensuring that the failure of a single component does not affect the entire system. This architecture, combined with multiple availability zones in the UK, provides redundancy and fault tolerance. This design supports uninterrupted platform upgrades and patching, maintaining service continuity even during infrastructure loss within a zone.

Service Performance Planning

We leverage a high-performance scalability model to dynamically allocate resources based on demand, ensuring optimised performance and scale. Our system is capable of adjusting resource capacity dynamically in response to traffic or usage, such as automatically scaling up during spikes in interactions and scaling down afterward.

Measuring Downtime

Our service is committed to a 99.99% uptime SLA, one of the highest standards in the CCaaS industry. Real-time platform availability is monitored and reported on our status page, ensuring transparency and accountability. In case of planned maintenance or incidents, we notify clients in advance to mitigate unexpected disruptions.

Preparing for Ad-hoc Service Needs

Our infrastructure supports rapid and effective responses to ad-hoc service needs, thanks to its cloud-native architecture. Tools like voicebots, digital deflection, and generative AI are ready to manage peaks in call volumes or unexpected service demands, ensuring continuity and high service levels.

Risk Management

Risks are continuously assessed and managed by our Project Managers and Implementation Engineers. They classify and prioritize risks, ensuring timely mitigation strategies are in place. Common risks like meeting attendance and server readiness are addressed through clear ownership and project plan adherence.

Incident and Service Request Management

Our Service Desk Analysts are responsible for logging, triaging, and addressing incidents promptly. We provide a 30-minute technical response for major incidents and a 4-hour response for minor incidents during business hours. Regular service reviews are conducted to assess performance metrics and drive continual improvement.

By integrating these strategies, we effectively minimize risks and ensure consistent, high-quality service delivery, ready to adapt to both planned and unplanned demands.

3.11. Financial Recompense Model for not Meeting Service Levels

We offer Service Credits as recompense. These credits are calculated as a percentage of the monthly spend and are provided as a refund or credit if the service level falls below the target. Specifically, for the ECX CCaaS Availability in a calendar month, service credits are applied as follows:

- If the achieved service level is below 99.99% but above 99.9%, a 5% credit of the monthly value of committed recurring fees is given.
- If the achieved service level is below 99.9% but above 99.3%, a 10% credit applies.
- If the achieved service level is below 99.3% but above 98.85%, a 15% credit is provided.

To be eligible for a service credit, the customer must report the incident at the time of the availability outage.

4. Provision of the service

4.1. Customer Responsibilities

Terms and conditions (such as EULA) can be found in the separate Terms document, though we have detailed below some of the obligations expected from users.

YOUR RESPONSIBILITIES

Your Account: Subject to any limitation on the number of individual Users available under the Service Plan to which You subscribed, access and use of the Service(s) is restricted to the specified number of individual Users permitted under Your subscription to the Service(s). Each User shall be identified using unique login information such as usernames and passwords (“**User Login**”) and such User Login shall be used only by one individual. If You are a managed service provider and You wish to use the same User Login across Accounts that You manage for Your clients, You acknowledge that it is Your sole responsibility to obtain necessary consents from such clients. Without prejudice to Our obligations under Sections 9 and 10 of these Terms, You are solely responsible for the confidentiality of Service Data and User Login at Your end. You should, therefore, not share Your User Login with any third parties. In any event, unless You notify Us of any unauthorized use or suspicious activity in Your Account, You are responsible for all activities that occur under Your Account. Group Companies will not be liable for any damage or loss that may result from Your failure to protect Your login information, including Your password. Without limiting the foregoing, You are solely responsible for ensuring that Your use of the Service(s) to store and transmit Service Data is compliant with all applicable laws and

regulations. You also maintain all responsibility for determining whether the Service(s) or the information generated thereby is accurate or sufficient for Your purposes.

Your use of the Service(s): You agree not to (a) license, sublicense, sell, resell, rent, lease, transfer, assign, distribute, time share or otherwise commercially exploit or make the Service(s) available to any third party, other than Users and End-Users in furtherance of Your internal business purposes as expressly permitted by these Terms; (b) use the Service(s) to Process data on behalf of any third party other than Your Users and End-Users; (c) modify, adapt, or hack the Service(s) or otherwise attempt to gain or gain unauthorized access to the Service(s) or related systems or networks; (d) falsely imply any sponsorship or association with Us; (e) use the Service(s) in any unlawful manner, including but not limited to violation of any person's privacy rights; (f) use the Service(s) to send unsolicited communications junk mail, spam, pyramid schemes or other forms of duplicative or unsolicited messages; (g) use the Service(s) to store or transmit any content that infringes upon any person's intellectual property rights; (h) use the Service(s) in any manner that interferes with or disrupts the integrity or performance of the Service(s) and its components; (i) attempt to decipher, decompile, reverse engineer, disassemble, reproduce, or copy or otherwise access or discover the source code or underlying program of any Software making up the Service(s); (j) use the Service(s) to knowingly post, transmit, upload, link to, send or store any content that is unlawful, racist, hateful, abusive, libelous, obscene, or discriminatory; (k) use the Service(s) to store or transmit any "protected health information" as that term is defined in 45 C.F.R. 160.103 unless expressly agreed to otherwise in writing by Us; (l) use the Service(s) to knowingly post, transmit, upload, link to, send or store any viruses, malware, Trojan horses, time bombs, or any other similar harmful software ("**Malicious Software**"); (m) establish a link to Our Websites in such a way as to suggest any form of association, approval or endorsement on Our part where none exists; (n) use the Service(s) for the purposes of cookie tracking, ad exchanges, ad networks, data brokerages, or sending electronic communications (including e-mail) in violation of applicable law; (o) use of the Service(s) for any purpose prohibited by applicable export laws and regulations, including without limitation, nuclear, chemical, or biological weapons proliferation, or development of missile technology; (p) try to use, or use the Service(s) in violation of these Terms.

You shall be responsible for any loss of data or attempted or actual access or use of the Service(s) through Your Account in violation of these Terms.

If We inform You that a specified activity or purpose is prohibited with respect to the Service(s), You will ensure that You immediately cease use of the Service(s) for such prohibited activity or purpose.

4.2. Technical Requirements and Client-Side Requirements

System Requirements and Client Resource Commitments

To facilitate the successful deployment and operation of the ElasticCX CCaaS platform, the following system and client resource requirements must be documented and agreed upon in the Order Form:

System Requirements

4.2.1.1. NETWORK CONNECTIVITY

- A robust internet connection is essential for both remote advisors and on-premise endpoints.
- Specifications:
 - Low latency and minimal packet loss.
 - Sufficient bandwidth to support concurrent voice and digital channels.
 - Connectivity must meet minimum thresholds for real-time voice and media streaming.
 - **Internet Connection:** 20 Mbps download / 5 Mbps upload, with Ethernet connection recommended.

4.2.1.2. HARDWARE REQUIREMENTS

- Physical Handsets: Yealink devices are supported for voice endpoints.
- Desktop Clients: Must be compatible with modern operating systems, specifically Windows and macOS.
- Mobile Application: Supported on Apple iOS and Android 10+.

4.2.1.3. MINIMUM COMPUTER REQUIREMENTS

- Operating System:
 - A supported version of Windows or MacOS.
- Processor:
 - 2.5 GHz Dual Core or faster.
- Memory:
 - 16 GB recommended
 - 8 GB minimum (16 GB is essential if using screen recording.)
- Disk Space:
 - 100 GB on the Operating System drive.
- Desktop Resolution:
 - 1920 × 1080 recommended.
- Mic/Audio:
 - Wired analog headset with integrated microphone recommended.

4.2.1.4. BROWSER REQUIREMENTS

- The WebRTC-based advisor interface requires the latest versions of Google Chrome, Microsoft Edge, or other supported browsers.
- **Browser:** Google Chrome or Microsoft Edge, updated to the latest version.
- TLS 1.2+ must be enforced for secure sessions.

4.2.1.5. OPERATING SYSTEMS

- Desktop Application Compatibility:
- Windows 10 or later.
- Current supported versions of macOS.
- Mobile Application Compatibility:
 - Latest stable release of iOS.
 - Android 10 or later.

4.2.1.6. PROJECT LEAD & TECHNICAL CONTACTS

- The client must designate a project lead and technical contacts with the necessary expertise to support implementation and ongoing operations.

4.2.1.7. INFORMATION PROVISION

- Clients are required to provide configuration details, user data, and integration requirements prior to deployment.

4.2.1.8. TIME COMMITMENT

- Participation in workshops, user acceptance testing (UAT), and training sessions is necessary to ensure successful onboarding.

4.2.1.9. DOCUMENTATION & AGREEMENT

- All requirements will be discussed and agreed upon prior to order placement.
- These requirements will be documented in the Order Form and/or Statement of Work (SOW) to ensure clarity and compliance.

ElasticCX CCaaS requires stable network connectivity, supported hardware/software environments, and client engagement for configuration and testing. These prerequisites will be confirmed and documented before service activation to meet the client's needs effectively.

4.3. Outcomes/Deliverables

The client will receive a comprehensive suite of deliverables, outputs, and outcomes, including a fully managed CCaaS solution with robust governance, proactive support, and continuous improvement initiatives. This ensures measurable business outcomes and long-term value.

Deliverables

- ElasticCX CCaaS Platform fully configured to client requirements.
- Customer Detail Workbook (CDW) documenting all configuration and integration details.
- Operations Manual including escalation matrix, support procedures, and contact points.
- Training Materials & Access:
 - Bespoke training programs for administrators, supervisors, and advisors.
 - Train-the-Trainer model and on-demand digital learning portal.
 - Knowledge Transfer Sessions during implementation and transition phases.
- Monthly Service Performance Pack with SLA metrics, ticket analysis, and improvement recommendations.
- Quarterly Business Review Reports including roadmap alignment and feature adoption insights.
- Disaster Recovery & Business Continuity Plans delivered within agreed timelines (BCP within 30 days, DR plan within 60 days of go-live).
- Compliance Documentation (ISO certifications, GDPR adherence, security measures).

Outputs

- Configured Contact Centre Environment supporting voice, digital channels (email, chat, SMS, social), and optional AI features.
- Integrated Reporting Dashboards for real-time and historical performance monitoring.
- Proactive Monitoring & Alerting with daily health checks and incident management.
- Multi-tiered Support Model:
- 24/7 incident response for critical issues.
- ITIL-aligned change and release management.
- Customer Portal Access for ticket management, SLA tracking, and change approvals.

Outcomes

- Improved Customer Experience (CX) through omnichannel engagement and intelligent routing.
- Operational Efficiency via automation, AI-driven insights, and streamlined workflows.
- Enhanced Compliance & Security with ISO 27001 and GDPR-aligned processes.
- Continuous Service Improvement through regular reviews, CSI register, and innovation workshops.
- Business Resilience with tested disaster recovery and service continuity options.
- Strategic Partnership supported by a dedicated Customer Success Manager and Service Delivery Manager to drive adoption and ROI.

4.4. Development life cycle of the solution

For the ElasticCX CCaaS platform, the development approach we utilise is an Agile methodology of software development, with sprints per release cycle that break down the Epics and User Stories that will be delivered per release with a backlog across the roadmap. Within this Agile approach, we utilise a User Centred Design process for the ElasticCX Product Design.

Research/Understanding: We look at market/competitor data and customer feedback to ensure we build what customers want now, next and in the future.

Concept/Design/Test: Research phase feeds into design concepting where we propose design options through workshoping, design concepts using mock-ups, wireframes and prototypes.

Develop/Build/Test/Launch: Build, test and launch the final product ready features and enhancements, integrating user feedback from early lifecycle of product ensuring iterative cycle of development that meets user needs, usability and experience targets. During the test phase there will be Regression and UAT test cycles to determine product reliability and quality.

Feeding into each release cycle we have a Feature Request mechanism that allows us to take feedback directly from customers to submit their feature and idea submissions via our Customer Success Managers or Service Delivery Managers.

4.5. After-sales Account Management

To build and maintain robust customer relationships, we adopt a comprehensive framework that combines account management, customer success, and service delivery management. This approach ensures strategic alignment, operational excellence, and continuous improvement throughout the customer journey.

Supported by Customer Success Managers, Service Delivery Managers and experienced technical experts and solution architects, we provide proactive governance, technical guidance, and innovation planning to help clients achieve their business objectives and maximize the value of their investment.

4.6. Dedicated Account Management Structure

Customer Success Manager (CSM):

- Acts as a trusted advisor, focusing on adoption, ROI, and business outcomes.
- Develops and updates a Customer Success Plan aligned with client priorities throughout the contract lifecycle.

Service Delivery Manager (SDM):

- Oversees service performance, SLA adherence, and governance.
- Leads monthly service reviews to ensure continuous improvement.

Account Manager:

- Manages commercial engagement, contractual compliance, and strategic planning.

Technical Experts & Solution Architects:

- Provide design, optimisation, and technical consultancy.

Training & Enablement Lead:

- Delivers bespoke training and ensures knowledge transfer.

4.7. Relationship Management & Communication

- **Regular Governance Meetings:**
Conducted to ensure alignment and address any issues promptly.
- **Monthly Service Reviews:**
Cover SLA performance, ticket trends, CSI register, and improvement opportunities.
- **Quarterly Business Reviews:**
Focus on strategic roadmap alignment, feature adoption, and innovation planning.
- **Customer Dashboards:**
Offer real-time visibility of SLA performance, incident statuses, and change approvals via the client portal.
- **Escalation Matrix:**
Provides clear paths for resolving critical issues rapidly and transparently.

4.8. Ensuring Customer Satisfaction

- **ITIL-Aligned Service Management:**
Ensures predictable and high-quality service delivery through incident, problem, and change management processes.
- **Proactive Monitoring & Health Checks:**
Daily platform checks and real-time alerts prevent service disruptions.

- **Feedback Mechanisms:**
Post-ticket surveys and in-ticket “Service Thermometer” track real-time sentiment. Negative feedback prompts structured follow-up and remediation plans.
- **Continuous Service Improvement (CSI):**
A shared CSI register, reviewed monthly, tracks enhancements and addresses recurring issues.

4.9. Growing the Partnership

- **Innovation Workshops:**
Introduce new features, AI capabilities, and best practices to enhance operational efficiency and customer experience.
- **Roadmap Reviews:**
Keep clients informed of upcoming platform enhancements and deprecation schedules.
- **Value-Added Services:**
Include health checks, optimisation reviews, and consultancy on workforce management and routing strategies.

4.10. Long-Term Retention

- **Strategic Success Planning:**
CSM collaborates with client stakeholders to define measurable outcomes and adoption strategies.
- **Executive Engagement:**
The IPI Serve Programme ensures senior-level alignment between organisations.
- **Transparent Reporting:**
Monthly performance packs and quarterly reports provide actionable insights and demonstrate value.

4.11. Outcomes for the Client

- **Strong Governance and Communication Framework:**
Ensures effective communication and management of expectations.
- **Continuous Improvement and Innovation Roadmap:**
Drives enhancements and keeps the partnership dynamic and forward-looking.
- **Measurable ROI through Adoption and Optimisation:**
Demonstrates value and justifies ongoing investment.
- **Trusted Partnership Focused on Long-Term Success:**
Fosters a collaborative environment aimed at mutual growth and success.

4.12. Termination Process

Approach to Termination

Termination of the ElasticCX service is governed by the terms set out in the Call-Off Contract. Customers may request termination by written notice to ipps@ipintegration.com.

Customer Responsibilities:

- Export all service data before termination.
- Pay any outstanding subscription charges

Supplier Responsibilities:

- Retain service data for 14 days post-termination for customers on a Service Plan (or 6 months for non-renewed accounts), after which data is permanently deleted.
- Provide reasonable assistance for data export during the retention period.

Data Handling Post-Termination

- Service Data cannot be recovered once deleted.
- Migration requests must be completed before the retention period ends.
- Any porting of phone numbers or related services requires prior notice and may incur additional charges.

Termination is structured to protect both parties:

- Supplier ensures data retention for a limited period and offers export options.

5. Our experience

5.1. Case Studies

IPI have been deploying contact centres for over 20 years and have migrated dozens of organisations from on-premise to cloud, as well as setting up or migrating existing cloud contact centre users. IPI have anonymised the references and case studies due to commercial and customer sensitivities. These can be made fully available upon request.

We partner with a number of public sector and not-for-profit organisations, as well as some of the UK's largest utility companies, retailers, insurance, and financial service providers.

Some of our current public sector and not-for-profit clients include:

- NHS hospital trust – 70 contact centre and 14,000 back-office users
- NHS Foundation Trust – 250 users
- Housing trust – 400 concurrent users
- Accessible transport provider – 600 concurrent users
- Large international charity – 150 concurrent users

Multiple detailed case studies can be found on our website (Resources - IP Integration), including more detail on the following:

Case Study: Large Education Body

Customer's Opportunity: Our customer is a leading global educational resources supplier, needed to replace its outdated contact centre solution. With a tight deadline of just over four months, our customer sought a feature-rich, cloud-based solution to enhance customer service and flexibility. IPI, a trusted partner since 2019, was chosen to lead the project due to its deep understanding of our customer's business objectives and processes.

Solution: Our customer selected IPI's ElasticCX CCaaS solution for its enterprise-grade features, extensive API-led integration capabilities, and user-friendly interface. The solution increased automation within our customers contact centre, offering self-service options, chatbot and voice bot functionalities, advanced reporting, and seamless integrations with Workforce Engagement Management (WEM), HR, CRM, and BI systems.

Benefits:

- **Cost Savings:** Our Customer achieved an annual cost saving of £50,000 compared to its previous solution.
- **Efficiency:** The new platform streamlined daily reporting processes, saving an additional £5,000 annually and allowing advisors to focus on higher-value tasks.
- **Customer Satisfaction:** Our customer maintained industry-leading NPS scores of >80 and 'Excellent' Trustpilot ratings during and after the migration.
- **Recognition:** In October 2023, our clients customer service was recognised by the UK Customer Experience Awards in the 'Customers at the heart of everything' category.

Customer Testimonial: "IPI's deep understanding of our business objectives, together with its feature-rich ElasticCX CCaaS solution, had an immediate impact on the experience of our customers and agents alike." - Customer Experience & Strategy Director.

5.2. Clients

We have a wide variety of clients both in the public and private sectors. These can be made available upon request.

5.3. Contact Details

Use the Subject Line: G-Cloud 15

Email: enquiries@ipintegration.com

Tel: 0118 918 4600