

Service Definition: Business Applications – CRM

1 Service overview

Circyl's Business Applications – CRM service supports organisations to design, configure and implement customer relationship management solutions that reflect how their business operates. The service focuses on structuring customer, case or account information within a single platform to improve visibility, consistency and operational control.

The service can be delivered as a standalone CRM engagement or as part of a wider business change or digital transformation programme. It is suitable for organisations seeking to replace fragmented systems, formalise processes or improve how information is captured and used across teams.

2 What the service includes

The service includes the design and configuration of a CRM solution aligned to the organisation's operational processes and information needs. This covers the definition of data structures, entities and relationships required to manage customer, case or account information within a single system.

The service includes configuration of core CRM functionality to support day-to-day activities, such as data capture, workflow, task management and reporting. Where required, the service also includes integration with other business systems to enable information to flow between platforms in a controlled and auditable manner.

The service may include configuration to support multiple teams or business functions, with appropriate access controls and role-based views. It supports both initial CRM implementation and the enhancement or extension of an existing CRM solution, depending on the scope agreed at call-off.

3 Service delivery approach

The CRM service is delivered through a structured and collaborative approach, tailored to the scope and objectives agreed at call-off. Engagements typically begin with discovery activities to understand existing processes, data structures and user requirements. This informs the configuration and design of the CRM solution.

Delivery is iterative, allowing functionality to be configured, reviewed and refined in collaboration with client stakeholders. Progress is managed through agreed governance arrangements, with regular checkpoints to confirm alignment with requirements and to manage risks, dependencies and change.

The service may be delivered on a fixed price or time and materials basis, depending on the level of definition and certainty of requirements. Delivery activities are led by experienced consultants who remain accountable for coordinating work, managing dependencies and supporting the client through implementation.

4 Onboarding and mobilisation

Onboarding activities are agreed at call-off and are proportionate to the scope of the CRM engagement. Mobilisation typically includes confirmation of objectives, scope, roles and responsibilities, along with establishment of governance, communication and delivery arrangements.

Access to required systems, environments and documentation is coordinated during mobilisation to enable delivery activities to commence in a controlled manner. Key stakeholders are identified and working practices are agreed to support collaboration throughout the engagement.

Mobilisation activities are designed to minimise disruption to existing operations and to ensure that delivery can progress efficiently once work begins.

5 Outputs and deliverables

Outputs and deliverables are defined at call-off and aligned to the agreed scope of the CRM engagement. Typical deliverables may include:

- Documented requirements, process maps or functional specifications relevant to the CRM solution
- Configured CRM entities, data structures and relationships
- Configured workflows, forms and user interfaces aligned to agreed processes
- Role-based access configurations and security models
- Configured reporting or dashboards, where included in scope
- Integration configurations with other business systems, where applicable
- Implementation documentation and handover materials
- Knowledge transfer sessions or supporting materials, where agreed

The specific outputs and deliverables for each engagement are confirmed within the Statement of Work.

6 Support and after-sales arrangements

Ongoing support and maintenance for this service is provided through Circyl Care, Circyl's standard post-delivery support offering. Circyl Care is offered for all delivered solutions and is strongly recommended but is not mandatory unless explicitly stated in the call-off contract.

Circyl Care provides access to experienced consultants familiar with the delivered solution, structured incident and query handling, agreed response targets, and ongoing technical assistance for operational issues, enhancements and advisory support.

Support arrangements, including scope, coverage and commercial terms, are agreed at call-off stage and are documented separately from this service definition. Circyl Care operates under a 12-month agreement and is aligned to the value and scope of the original project delivery.

Full details of Circyl Care, including service coverage, response handling and commercial structure, are provided in the Circyl Care service document.

7 Service constraints

Delivery of the CRM service is dependent on timely access to relevant stakeholders, systems and information required to complete the agreed scope of work. The service assumes that the client provides appropriate access to existing systems, documentation and data sources where these are required for delivery.

The CRM service does not include ongoing operational support unless explicitly agreed through a separate Circyl Care arrangement. Changes to scope, priorities or requirements during delivery may impact timelines and cost and are managed through agreed change control processes.

The service is delivered in line with the scope defined at call-off and does not include activities outside that scope unless formally agreed.

8 Security and data protection

Circyl handles data in line with contractual, regulatory and organisational requirements. Access to client data is restricted to authorised personnel and limited to the purposes of delivering the agreed service.

Security arrangements align with the nature of a cloud support and analytics service. Where required by the buyer, Circyl can support baseline personnel security requirements such as BPSS.

9 Service exit and offboarding

Service exit and offboarding arrangements are agreed at call-off and are proportionate to the scope of the CRM engagement. On completion or termination of the service, Circyl supports an orderly handover of agreed deliverables, documentation and access in line with the Statement of Work.

Where applicable, configuration documentation and implementation artefacts created during delivery are provided to support continuity. Responsibilities for data retention, transfer or deletion are agreed with the client and managed in accordance with applicable data protection requirements.

The CRM service does not include ongoing support following exit unless covered by a separate Circyl Care arrangement.



1310 Solihull Parkway, Birmingham
Business Park, Birmingham, B37 7YB
03333 209 969
enquiries@circyl.co.uk



www.circyl.co.uk



Circyl - The Digital Transformation Experts



@circyl

Circyl 
The Digital Transformation Experts