



# iIMMERSIVE

SALESFORCE AI PLATFORM EXPERTS

## G-Cloud 15

Service Definition  
Document



## 1) iMMERSIVE Overview

As the #1 Salesforce UKI Regional System Integrator (RSI), iMMERSIVE is committed to making an impact to our clients, our people and for society.

We are a multi-award winning, multi-cloud (full-stack) Salesforce pureplay solution integrator with over 120 staff based across the UK and Europe providing Salesforce professional services public and private clients across multiple industries.

We work together to build trust, support inclusive growth, and build capability, enabled by our breadth and depth of expertise across advisory, delivery, change management and managed services.

Our public sector practice serves government agencies and social housing organisations. References are available upon request.

We also possess over 15 years of experience having supported adjacent sectors such as Residential Homebuilding, Property Management, Construction and Facilities Management therefore bring a lot of transferrable experience to our public sector work.

What this means is that we will staff your programmes with a team who already have knowledge of the industry meaning we can deliver quicker and share valuable insights from our experiences with other similar organisations.



Our two Salesforce awards in 2025 are a testament to our successful partnerships with organisations in this industry.

## 2) Our Experience

We have a proven track-record dating back over 15 years.

Our management team possess over 75 years of Salesforce experience and have delivered over 750 projects to over 150 customers.

- Salesforce Summit Partner (highest tier)
- 5/5 Leading UK CSAT
- 400+ Salesforce Certifications

### 3) Our Accelerators

We have developed a number of different Salesforce accelerator solutions to help our customers adopt Salesforce technology faster, more easily and more successfully, minimising programme risk.

These pre-configured, multi-cloud, tried and tested solutions are based on 15+ years of best practice.

Some of these accelerators are aimed at specific sub-sectors such as our Social Housing accelerator, others are more capability based such as our Asset Management accelerator.

Here at iMMERSIVE, we are constantly innovating. Please refer to our website (<https://immersivai.co.uk/>) for the most up-to-date overview of what we can offer.

Embedded within our accelerators are best-in-class ISV solutions which enhance Salesforce's standard cloud offering with the best of what is provided by the AppExchange.

### 4) Service Definitions

#### Discovery & Advisory

##### Who would benefit from this service?

- Organisations planning a CRM initiative for example, a customer service or field service transformation or customer experience change. Any organisation needing clarity before committing to a big business and technology change programme
- Teams with complex stakeholder needs (e.g. frontline, contact centre, field teams, leadership) who need alignment on priorities
- Businesses with fragmented processes and data across systems, spreadsheets, or legacy platforms
- Programmes with integration complexity (e.g. ERP, finance, HR, housing management)
- Organisations needing assurance on scope, phasing, budgets, and delivery risk in order to help justify investment approval
- Social housing providers modernising tenant services, repairs, and arrears/case workflows
- Public sector / defence-aligned organisations needing secure, scalable designs and clear delivery governance

##### Features/benefits

- **Clearly defined vision and outcomes** - Aligns stakeholders on the “why”, measurable success metrics, and the end-state experience
- **Tangible business and project objectives** - Converts goals into prioritised requirements and decision-ready scope boundaries
- **As-is challenges understood and evidenced** - Captures pain points, bottlenecks through workshops, data review, and user insights
- **To-be capabilities defined** - Establishes what the organisation needs to do better (capabilities, business process change, culture & TOM changes)
- **To-be process improvements mapped** - Streamlined future processes, roles, and handoffs to reduce effort and improve consistency
- **To-be architecture including transition states** – Explains what the end vision is and how we would work together to get there

- **High-level roadmap and phasing approach** - Provides sequenced workstreams, dependencies, and quick wins supporting confident decision-making
- **Indicative timelines and delivery approach** - Proposes realistic milestones, resourcing assumptions, and delivery cadence to manage expectations
- **Indicative budgets and cost drivers** - Clarifies cost ranges, assumptions, and levers supporting funding approvals and procurement
- **Validated requirements and priority** - Reduces rework by confirming what matters most and what could be deferred to a later phase/date
- **Quantified benefits and cost/benefit case** - Builds a credible benefits view to support investment decisions and benefit tracking
- **Data and integration scope uncovered early** - Avoids surprises by identifying key datasets, data quality risks, and integration touchpoints
- **High-level change management approach** - Protects adoption with stakeholder impacts, training needs, communications and readiness considerations
- **Resource requirements and roles/responsibilities** - Defines workshare across client/partner teams and defines clearly the role each party will play for clear accountability
- **Risks identified, mitigations agreed** - Creates a practical view of delivery risks and controls, improving programme confidence

#### Key success factors

- Accountable sponsors with authority to make timely decisions
- Access to the right stakeholders (process owners, SMEs, IT/security, data owners, frontline users)
- Clear prioritisation method (e.g. MoSCoW) and agreement on scope boundaries
- Early visibility of data and integration realities (sources, ownership, quality, constraints)
- Documented assumptions and decisions with a visible sign-off path
- Agreed delivery principles (MVP approach, phased rollout etc)
- Benefits baseline and measurement plan agreed upfront
- Realistic constraints acknowledged (budget, procurement timelines, security approvals, capacity)

## Solution Design

### Who would benefit from this service?

- Organisations moving from discovery into delivery and needing build-ready detail
- Teams requiring clarity on scope, cost, and timeline before committing funding
- Programmes with complex processes needing to understand where the benefits will come from
- Organisations with data quality, migration, or reporting complexity to demystify upfront
- Stakeholder-rich organisations needing alignment, governance, and sign-off discipline
- Social housing providers or public sector organisations needing controlled, secure design assurance

### Features/benefits

- **Prioritised, phased low-level requirements** - Converts high-level needs into detailed requirements and sequencing to reduce delivery risk
- **Clear acceptance criteria** - Defines what “success” looks like for each individual requirement, supporting testing, sign-off
- **Best-practice detailed solution design** - Produces a build-ready blueprint covering functional design, user journeys, and configuration approach
- **Detailed technical design (integration and data)** - Specifies integration patterns, interfaces, error handling, and data models/mappings for delivery confidence
- **To-be process maps** - Documents future workflows, roles, and handoffs to improve consistency and user experience
- **Detailed project approach and plan (PRINCE2/MSP)** - Establishes governance, controls, RAID, and delivery cadence to keep work predictable
- **Change management and communications plan** - Defines stakeholder impacts, comms cadence, training approach, and readiness to protect adoption
- **Detailed timelines and milestones** - Provides realistic delivery plan with dependencies, resourcing assumptions, and critical path
- **Detailed budgets and cost drivers** - Creates a credible cost view aligned to scope and phasing, supporting approvals and procurement
- **Requirements visibility and certainty** - Reduces rework by creating a single source of truth for scope, priorities, and decisions
- **Scope aligned to the business case** - Ensures design choices directly support measurable outcomes and benefits tracking
- **Risk mitigation strategies** - Identifies technical and delivery risks early with practical mitigations and contingencies

### Key success factors

- Signed-off business case and outcomes to anchor design decisions
- Active product/process owners available for rapid clarification and approvals
- Agreed prioritisation and phasing approach with scope boundaries enforced
- Early input from IT/security/data owners to avoid late-stage constraints
- Clear integration and data assumptions validated with system owners
- Accessible SMEs and end users for process validation and usability feedback
- Governance and decision cadence (design authority / steering) maintained consistently
- Traceability maintained from requirements → design → acceptance criteria → test plan
- Change readiness owned (training, comms, impacts) alongside technical design

## Programme Management

### Who would benefit from this service?

- Organisations running complex multi-workstream programmes, perhaps with multiple suppliers/partners
- Teams needing strong governance and fast decision-making to avoid delivery slippage
- Programmes with tight timelines, budgets or high scrutiny
- Transformations involving process, data, integration, and operating model change
- Organisations with limited internal PM capacity needing experienced leadership & support
- Stakeholder-heavy environments requiring clear comms, alignment, and buy-in
- Social housing providers/ Public sector needing robust controls and assurance

### Features/benefits

- **Governance and steering cadence** - Establishes boards/forums, decision rights, approvals, and a clear decision logs to set the programme up for success
- **Integrated programme plan** - Builds a single view of workstreams, dependencies, critical path, and milestones across teams
- **RAID management** - Maintains a live RAID with owners, actions, and mitigations with a clearly defined escalation path where needed
- **Budget and resource management** - Tracks spend, forecasts, capacity, and constraints to keep costs predictable and resourcing realistic
- **Delivery assurance and quality gates** – Defines stage/milestone reviews, quality checkpoints, and acceptance criteria to reduce defects and rework
- **Comms and stakeholder management** - Provides clear reporting, tailored updates, and alignment across leadership, SMEs, and delivery teams
- **Knowledge transfer and capability uplift** - Coaches client teams, shares templates/playbooks, and builds sustainable programme discipline
- **On-time delivery** - Actively manages milestones and dependencies to prevent slippage
- **Reduced delivery risk** - Identifies issues early and drives mitigations before they impact scope, time, or quality
- **Predictable costs** - Improves financial control through forecasting, change visibility and resource planning
- **Higher quality outcomes and adoption** - Ensures consistent standards, readiness, and communications supporting benefits realisation

### Key success factors

- Executive sponsor and empowered decision-makers with consistent attendance
- Clear scope, priorities, and outcomes agreed and controlled throughout
- Single integrated plan accepted by all workstream leads and suppliers
- Transparent reporting and escalation paths with agreed tolerances and actions
- Active ownership of RAID items with timely mitigations and resolution
- Resource commitments honoured (availability of SMEs, product owners, technical leads)
- Defined governance artefacts (status pack, decision log, RACI, quality gates)
- Change and comms aligned to delivery to support readiness and adoption
- Disciplined change control to manage scope creep and protect budgets

## Project Management

### Who would benefit from this service?

- Organisations delivering a defined project or workstream with fixed objectives
- Teams needing structure, pace, and accountability to meet deadlines
- Projects with multiple stakeholders requiring alignment and clear communications
- Delivery involving requirements, testing, and release coordination across teams
- Organisations with limited internal project management capacity or governance maturity
- Projects with supplier dependencies needing tight tracking and control
- Social housing providers / Public sector organisations requiring strong controls and reporting

### Features/benefits

- **Detailed plan and schedule management** - Creates a realistic delivery plan with milestones, dependencies, critical path with clear ownership
- **Backlog / requirements coordination** - Maintains prioritised requirements, traceability, and change visibility so the team builds the right things
- **RAID log management** - Tracks risks, assumptions, issues, and decisions with owners/actions, escalating early to avoid surprises
- **Change control and scope management** - Assesses impacts to time, cost, and quality, supporting approvals and protecting the baseline plan
- **Quality management** - Coordinates testing activity, acceptance criteria, and sign-off to reduce defects and rework
- **Status reporting and governance** - Provides transparent updates, dashboards, and action tracking to keep stakeholders aligned
- **Clear direction and alignment** - Ensures goals, scope, and outcomes remain understood and agreed throughout delivery
- **Reduced delays and bottlenecks** - Identifies blockers early and drives resolution to keep momentum
- **Better control of scope and costs** - Prevents scope creep and supports predictable delivery through disciplined controls
- **Higher delivery quality** - Via consistent checks, stage gates and approval processes
- **Improved stakeholder confidence** - Maintains a steady reporting cadence and clear decision-making, reducing uncertainty
- **Faster value realisation** - Keeps focus on priorities and benefits, enabling incremental releases where appropriate

### Key success factors

- Clear objectives, scope boundaries, and success measures agreed upfront
- Named project owner with authority to prioritise and make decisions
- Committed stakeholder and SME availability for requirements, testing, and sign-off
- Agreed governance cadence (status, steerco) with consistent attendance
- Single source of truth for plan, backlog, RAID, and decisions
- Disciplined change control with impact assessment and approvals
- Quality approach agreed early (test strategy, acceptance criteria, evidence)
- Dependency owners identified for suppliers, integrations, and internal teams
- Transparent reporting focused on actions, risks, and outcomes not just activity

## Change Management

### Who would benefit from this service?

- Organisations introducing new processes, technology, or ways of working
- Teams with diverse user groups (e.g. frontline, contact centre, field, back office) requiring tailored engagement
- Programmes with high operational impact where service continuity and productivity matter
- Stakeholder-rich environments needing clear sponsorship, consistent messaging and alignment
- Organisations with limited internal change capability or capacity needing external support
- Regulated or security-conscious settings where a controlled rollout is critical
- Social housing providers / Public sector organisations requiring disciplined governance and communications

### Features/benefits

- **Change strategy and roadmap aligned to delivery milestones** - Defines change objectives, sequencing, and a clear adoption plan aligned to releases
- **Stakeholder mapping, sponsorship planning, and engagement cadence** - Identifies influential stakeholders, builds sponsor ownership and sets an engagement rhythm
- **Role-based impact assessments across processes and teams** - Pinpoints what changes by role, location, and process to target support effectively
- **Communications plan: messages, channels, timing, and ownership** - Creates consistent, timely messaging with clear owners to reduce uncertainty
- **Training design with role-based learning paths and materials** - Produces targeted training and support content to speed time to competence
- **Resistance management: listening loops, coaching, targeted interventions** - Captures feedback early and addresses concerns through practical interventions
- **Adoption tracking via surveys, usage analytics, and insights** - Measures uptake, identifies gaps and drives continuous improvement actions

### Key success factors

- An engaged executive sponsor with visibility, time, and decision authority
- Early involvement of operational leaders, SMEs, and end users
- Clear definition of behaviours to change and how success will be measured
- Alignment between change plan, delivery milestones, and release cadence
- Two-way communications that surface feedback and address resistance quickly
- Training tailored to roles, supported by accessible materials and coaching
- Agreed readiness criteria and ownership for go/no-go decisions



## Enterprise Architecture

### Who would benefit from this service?

- Organisations needing to align technology investment to business strategy and outcomes
- Teams managing complex estates with duplicated systems, fragmented data or inconsistent standards
- Programmes planning multi-year transformation requiring a clear target architecture and roadmap
- Organisations introducing new platforms requiring integration, data and security alignment upfront
- Environments with strict governance and compliance needs, including public sector requirements
- Organisations seeking to reduce technical risk and improve scalability before major delivery starts
- Social housing providers / Public sector organisations modernising services requiring robust controls, security, and assurance

### Features/benefits

- **Current-state assessment across applications, data, and integrations** - Establishes a clear baseline of what exists today, pain points and key constraints
- **Target-state architecture aligned to business capabilities and strategy** - Defines future capabilities and how technology supports service, operational, and user outcomes
- **Architecture principles, standards, and reference patterns (TOGAF)** - Sets consistent design rules and reusable patterns to improve consistency and speed delivery
- **Integration architecture and API strategy for scalable connectivity** - Defines integration approaches, interface standards and patterns to reduce coupling and rework
- **Data architecture: models, ownership, lineage, and quality controls** - Clarifies core data entities, stewardship, quality rules and how data flows end-to-end
- **Security architecture: identity, access, compliance, and risk management** - Embeds security by design with clear controls, access models, and compliance considerations
- **Technology roadmap with sequencing, dependencies, and investment cases** - Produces a pragmatic, phased plan that balances quick wins with long-term foundations
- **Architecture governance: reviews, decision logs, and design assurance** - Provides oversight and decision-making that reduces risk and maintains standards across delivery

### Key success factors

- Clear business strategy and outcomes to anchor architecture decisions
- Access to application, data, integration and security SMEs for accurate assessment
- Agreement on architecture principles and decision rights across stakeholders
- Early identification of constraints (procurement, hosting, security accreditation, legacy contracts)
- A prioritised capability roadmap with realistic funding and delivery sequencing
- Strong stakeholder engagement to avoid “ivory tower” designs and ensure adoption
- Governance that is lightweight enough to enable pace, but robust enough for control
- Traceability from business capabilities to solution decisions and investment choices

## Technical Architecture

### Who would benefit from this service?

- Organisations moving from solution design into build and needing build-ready technical detail
- Teams delivering complex integrations, data migration, or multi-system workflows
- Programmes with high non-functional demands (availability, performance, resilience, scale)
- Security-conscious environments requiring clear controls, auditability, and compliance alignment
- Organisations needing reliable deployment patterns across dev/test/prod and release cycles
- Projects where operational support, monitoring, and incident prevention are critical from day one
- Social housing providers / Public sector organisations requiring robust design assurance and controls

### Features/benefits

- **Detailed solution blueprint covering components, interfaces, and dependencies** - Defines how the solution fits together end-to-end reducing ambiguity and rework
- **Target-state architecture aligned to business capabilities and strategy** - Ensures technical decisions support the intended services, outcomes and future roadmap
- **Non-functional requirements: performance, resilience, scalability, and availability** - Captures measurable NFRs and design responses to ensure production readiness
- **Integration design: APIs, messaging, event flows, and error handling** - Specifies patterns, contracts, retries and failure modes to reduce integration risk
- **Data flow design: ingestion, transformation, storage, and retention** - Defines data movement and controls to support reporting, automation and governance
- **Security design: IAM, encryption, and audit logging** - Embeds security by design with clear access models, encryption approach and traceability
- **Technical standards and reference patterns for consistent delivery** - Establishes reusable patterns and guardrails that improve speed, consistency and quality
- **Infrastructure design: hosting, networking, monitoring, and observability** - Defines environments, connectivity, monitoring, alerting and operational playbooks for post go-live

### Key success factors

- Clear scope and agreed solution design to anchor technical decisions
- Early involvement of security, infrastructure, integration, and data owners
- NFRs defined in measurable terms and agreed by business and IT
- Integration endpoints and constraints validated with system owners and vendors
- Data sources, quality issues, and migration approach confirmed early
- Agreed standards and governance so patterns are followed consistently
- Alignment to deployment approach (CI/CD, environments, release windows)
- Operational readiness planned early (monitoring, support model, incident processes)

## Salesforce.com Delivery, Implementation, Build & Test

### Who would benefit from this service?

- Organisations implementing Salesforce and needing end-to-end delivery support
- Teams replacing legacy CRM, case management, or service tools with a modern cloud platform
- Organisations needing rapid improvements through iterative releases and quick wins
- Programmes requiring integrations across multiple systems
- Organisations with complex data migration needs and a desire to improve data quality
- Security-conscious environments needing robust controls, auditability and compliant delivery
- Social housing providers / Public sector organisations requiring controlled delivery, testing and assurance

### Features/benefits

- **Salesforce Professional Services and project deliveries** - Provides experienced delivery leadership and specialist implementation expertise to deliver against the desired outcomes
- **Digital transformation** - Modernises user journeys, processes, and operating practices to improve service and productivity
- **Delivery of configurations, automations, and custom development** - Builds scalable functionality using best-practice design and reusable patterns to reduce rework
- **Integration builds using APIs, middleware, and event-driven patterns** - Connects Salesforce to enterprise systems with clear contracts, error handling and resilience
- **DevOps setup: environments, CI/CD, version control, deployments** - Establishes repeatable release processes that improve speed, quality and auditability
- **Data migration planning, cleansing, mapping, and validation** - Improves data quality which has knock-on benefits when it comes to reporting accuracy and system adoption
- **Testing strategy: unit, system, regression, performance, UAT support** - Reduces defects and go-live risk through structured testing and business validation
- **Migrations to Salesforce from legacy systems** - Plans and executes cutover with minimal disruption, supporting continuity and adoption

### Key success factors

- Clear scope, priorities, and measurable outcomes agreed before build begins
- Availability of business SMEs and product owners for decisions and UAT
- Early confirmation of integration endpoints, constraints, and security requirements
- Data ownership established, with access to legacy data and quality rules
- Agreed environments, release cadence, and deployment controls aligned to governance
- Defined testing approach with acceptance criteria, test data, and sign-off plan
- Strong change management and training aligned to rollout and go-live timing
- Hypercare and continuous improvement backlog to sustain value after launch

## Data Management

### Who would benefit from this service?

- Organisations struggling with inconsistent, duplicated, or incomplete customer and service data
- Teams needing trusted reporting and analytics to support operational and leadership decisions
- Programmes integrating multiple systems where data quality and reconciliation are critical
- Organisations planning migrations/consolidations and wanting clean governed data foundations
- Environments with strong privacy, retention and audit requirements needing clear controls
- Teams looking to improve automation outcomes by improving the quality of inputs
- Social housing providers unifying tenant, property, repairs and contact data across systems
- Public sector organisations requiring controlled access and compliance assurance

### Features/benefits

- **Data strategy aligned to business outcomes and use cases** - Defines priority data domains and how data supports services, reporting, and automation
- **Data governance: ownership, stewardship, policies, and standards** - Establishes clear accountability, decision rights, and standards to reduce inconsistency
- **Data quality rules, profiling, cleansing, and enrichment processes** - Identifies quality issues early, applies rules, and improves accuracy and completeness
- **Master data management for consistent customer and product records** - Creates a single view of core entities with matching, de-duplication, and stewardship controls
- **Data integration and pipelines across platforms and applications** - Designs reliable flows, transformations, and reconciliation to keep systems in sync
- **Security and privacy controls: access, retention, and compliance** - Implements role-based access, retention rules, and audit measures to reduce exposure
- **Monitoring and alerts for data health and pipeline reliability** - Tracks failures, latency, and quality indicators to resolve issues quickly and prevent recurrence
- **Trusted insights, faster reporting, better experiences** - Improves confidence in data-driven decisions, automation, and customer service outcomes

### Key success factors

- Clear business outcomes and priority use cases to focus effort
- Named data owners and stewards with authority and time to engage
- Access to source systems, data dictionaries, and integration documentation
- Agreed data standards and definitions for key entities and metrics
- Early profiling to expose quality issues, gaps, and migration risks
- Security and privacy requirements agreed with relevant stakeholders
- Monitoring approach defined with thresholds, owners, and response processes
- Sustainable governance cadence to maintain quality after implementation

## Managed Services

### Who would benefit from this service?

- Organisations needing reliable day-to-day support to keep Salesforce running smoothly
- Teams with limited internal admin capacity who want expert operational cover
- Businesses requiring predictable service levels, response times, and reporting
- Organisations with frequent releases needing disciplined deployment and regression control
- Security-conscious environments needing regular access reviews and compliance checks
- Teams wanting continuous improvement, not just “break/fix” support
- Social housing providers supporting frontline teams and tenant services with minimal downtime
- Public sector and defence-aligned organisations needing controlled operations and auditability

### Features/benefits

- **SLA-based support desk for incidents, requests, and questions** - Provides structured triage, prioritisation, and resolution with clear response targets
- **Proactive monitoring, alerting, and performance optimisation** - Identifies issues early, improves stability, and reduces disruption to users
- **Release management: deployments, regression testing, and scheduling** - Delivers controlled releases with testing discipline to minimise production defects
- **Continuous improvement backlog for enhancements and automation** - Maintains a prioritised pipeline of value-adding changes aligned to business needs
- **Security management: access reviews, compliance checks, vulnerability fixes** - Keeps controls current, reduces exposure, and supports audit and policy requirements
- **Administration and user management: roles, permissions, onboarding** - Ensures users have the right access quickly and securely, improving productivity
- **Knowledge base, documentation updates, and self-service resources** - Reduces repeat queries and accelerates resolution through reusable guidance
- **Service reporting: KPIs, trends, and quarterly improvement reviews** - Provides transparency on performance and a forum to prioritise improvements

### Key success factors

- Clear SLAs, prioritisation rules, and escalation paths agreed from the start
- A single service owner on the client side for decisions and prioritisation
- A well-defined intake process for requests, incidents and enhancements
- Regular governance cadence (weekly/monthly) to review performance and backlog
- Stable environments and release controls to support safe deployments
- Up-to-date documentation and knowledge sharing to reduce dependency risk
- Security and compliance requirements clearly defined and reviewed regularly
- A shared roadmap to align managed services activity with business priorities

## 5) Contact Details

Please send your requirement to [hello@immersiveai.co.uk](mailto:hello@immersiveai.co.uk). Alternatively, if you wish to discuss your requirements in more detail, please send us the following information and we will be happy to contact you:

- Your organisation name
- The name of this service
- Your name and contact details
- A brief description of your business situation
- Your preferred timescales for starting the work