

Salesforce Cloud Setup, Migration & Adoption

1. Service Overview

Salesforce Cloud Setup, Migration & Adoption is an end-to-end service that helps public sector organisations plan, implement, migrate to and successfully adopt Salesforce cloud platforms. The service supports buyers at any stage of their Salesforce journey, from early discovery through to live operation and user adoption.

The service is designed to reduce delivery risk, improve data quality and ensure Salesforce delivers measurable operational and service outcomes. It is suitable for new Salesforce implementations, migrations from legacy systems or CRM platforms, and optimisation of existing Salesforce environments.

2. Scope of the Service

This service includes the following activities, tailored to buyer requirements:

- Discovery and requirements definition
- Salesforce solution design and configuration
- Data migration from legacy systems or existing platforms
- Integration planning and implementation
- Testing, validation and deployment support
- User adoption, training and handover
- Post-go-live stabilisation and optimisation

The service supports core Salesforce cloud platforms and agreed integrations. Salesforce licences and third-party software are not included.

3. How the Service Is Delivered

Delivery follows a structured, phased approach aligned to public sector delivery best practice:

1. **Discovery and Planning** - understanding business needs, risks and constraints
2. **Design and Build** - configuring Salesforce to agreed requirements
3. **Migration and Integration** - securely migrating data and connecting systems
4. **Testing and Deployment** - validating functionality and supporting go-live
5. **Adoption and Optimisation** - enabling users and embedding the platform

Delivery is primarily remote in the UK using secure collaboration tools. On-site delivery can be provided by agreement.

4. Roles and Responsibilities

ThirdEye provides:

- Salesforce-certified consultants responsible for delivery and configuration
- Technical specialists for data migration and integration
- Delivery oversight and quality assurance

Buyers provide:

- Access to systems, data and environments
 - Engagement from business and technical stakeholders
 - Timely decisions and approvals
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5. Service Levels and Timescales

Timescales depend on service scope, complexity and data readiness. Milestones and delivery plans are agreed at the start of the engagement. Progress is tracked through regular status reporting and checkpoints.

6. Security and Compliance

The service is delivered in line with public sector security, data protection and governance requirements. Access controls, data handling and audit requirements are agreed with buyers during discovery.

7. Onboarding and Exit

Onboarding includes knowledge transfer, access setup and delivery planning. Exit support can be provided to ensure continuity, documentation handover and transition to in-house or third-party support.

8. Pricing Model

The service is priced using fixed-price packages, agreed day rates or a combination of both, depending on scope and delivery approach. Pricing is transparent and agreed at contract award.