

CodM Software AI-powered Salesforce Development and Salesforce Support

G-Cloud 15 Lot 3 Cloud Support



Introducing CodM Software Limited's Salesforce Cloud Support service, available through G-Cloud 15 under Lot 3 Cloud Support. As a UK-based Salesforce Ridge Partner and AI consultancy with over 12 years of experience, CodM provides modern cloud solutions tailored for the public sector.

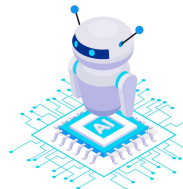
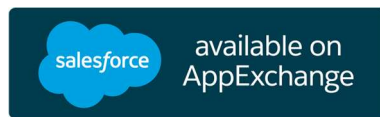
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1. Introduction

Company Overview

CodM Software Limited is a UK-based IT consultancy specialising in Salesforce and AI-driven software solutions. CodM was established by Salesforce experts, each with 12+years' experience in CRM and web applications domain. We deliver end-to-end Salesforce services including implementation, configuration, integration, and ongoing support. Our expertise spans multiple Salesforce CRM Clouds such as Sales cloud, Service cloud, Experience cloud, Education Cloud, Field Service Lightning, Pardot, Industries cloud using OmniStudio. CodM Software helps organisations enhance efficiency and customer engagement through tailored digital transformation strategies. Our extensive business insight and experience ensure scalable, secure, and outcome-focused solutions for our clients.



Value Proposition

Across the UK public sector, organisations continue to face challenges in managing complex stakeholder relationships, legacy systems and fragmented data. Many departments and institutions still rely on siloed technologies that limit visibility, slow decision-making and increase operational costs. These issues hinder user engagement, reduce service efficiency and create barriers to digital transformation.

CodM Software Limited helps public-sector bodies overcome these challenges through the implementation and optimisation of Salesforce-based solutions. Our services enable organisations to consolidate data, automate workflows and improve collaboration across departments.

We add value through a “business-first, technology-second” approach, focusing on measurable outcomes rather than technical delivery alone. This ensures each Salesforce solution is tailored to organisational goals, compliance needs and user adoption priorities.

As an agile UK-based consultancy, we combine deep Salesforce expertise with flexible delivery models, allowing public bodies to achieve transformation efficiently and cost-effectively. Our focus on continuous improvement, knowledge transfer, and long-term support ensures that clients gain sustainable value and remain aligned with evolving government digital standards.

Our Certifications



What the Service Provides

CodM Software Limited provides comprehensive Salesforce consulting and support services designed to help organisations implement, enhance and maintain their Salesforce environments. Our services are focused on improving efficiency, data visibility and user experience across departments.

Our core service offering includes:

- **Salesforce Implementation & Configuration:** End-to-end setup, customisation and integration of Salesforce Clouds including Sales Cloud, Service Cloud, Experience Cloud, Education Cloud, Field Service Lightning, Marketing Cloud, OmniStudio for Industries Cloud.
- **AI-Enhanced Automation:** Integration of AI models within Salesforce (e.g., Einstein, Agentforce, custom LLMs) to automate case triage, sentiment analysis, forecasting and knowledge retrieval.
- **Managed Support Services:** Ongoing administration, maintenance, issue resolution and continuous improvement to ensure platform reliability and alignment with business objectives.
- **Process Automation & Optimisation:** Design and deployment of Salesforce Flows, approval processes and workflow automation to reduce manual effort and improve productivity.
- **Data Management & Migration:** Secure transfer, cleansing and optimisation of data to support accurate reporting and compliance with public-sector data standards.

- Integration Services: Connecting Salesforce with existing systems such as ERP, HR, finance and communication platforms to enable a single, unified data ecosystem.
- User Training & Knowledge Transfer: Structured enablement and upskilling programmes to ensure sustainable adoption and in-house capability building.

Outcomes for buyers:

- Improved service efficiency through automation and data insights.
- Enhanced citizen and stakeholder engagement powered by personalised AI interactions.
- Reduced manual workload and operational costs.
- Data-driven decision-making and greater organisational agility.
- Scalable, secure, and compliant Salesforce environments aligned with public-sector standards.

Social Value

At CodM Software Limited, we believe that equal opportunity and wellbeing are key to building a positive and productive workplace.

We provide an open and inclusive environment where everyone has the same chance to grow, contribute and succeed. Our team is made up of people from diverse backgrounds, and we make sure that recruitment, development and progression are based purely on skills and ability.

We also place strong emphasis on employee wellbeing. We promote a healthy work–life balance through flexible working arrangements, open communication and regular team check-ins. Our culture encourages collaboration, respect and support so that everyone feels valued and motivated.

Overview of the G-Cloud Service

CodM Software Limited delivers support and managed services for the Salesforce CRM platform, enhanced with artificial intelligence and integration capabilities. The service is designed to assist organisations in maintaining, optimising and evolving their Salesforce ecosystems to meet business needs, regulatory requirements and user experience.

Key Service Capabilities

- **Platform Support & Administration**
 - Routine administration of Salesforce environments - This responsibility focuses on maintaining the stability, security and efficiency of Salesforce environments. It involves performing routine administrative tasks such as creating and managing user accounts, assigning appropriate permission sets and profiles, configuring roles and sharing rules and ensuring proper data

access control across the system. Regular monitoring of system usage and performance is crucial to identify potential issues early and maintain platform integrity.

- Ticket resolution - A key aspect of this area is incident and ticket resolution, responding promptly to user-reported issues, troubleshooting errors and implementing permanent fixes to maintain business continuity. Conducting regular platform health checks helps proactively detect inconsistencies or performance bottlenecks, while continuous performance optimisation ensures that the system runs smoothly even as business needs evolve.
- Upgrade support - Additionally, release and upgrade support play a vital role in ensuring seamless transitions during Salesforce updates. This includes reviewing release notes, assessing potential impacts on existing customisations, testing new features in sandbox environments and coordinating deployments to production. The goal is to ensure continuity of business operations and minimise disruption during system changes.

- **Configuration, Customisation & Enhancement**

- Configuration - This area focuses on tailoring Salesforce to meet specific business requirements through precise configuration, advanced customisation, and continuous improvement of system capabilities. It involves implementing and optimising various Salesforce Clouds—such as Sales Cloud for opportunity management, Service Cloud for case handling and customer support, Experience Cloud for external portals, Education Cloud for student lifecycle management, Field Service Lightning for workforce optimisation, and Pardot or Industries Cloud (using OmniStudio) for marketing automation and industry-specific solutions. Each implementation is aligned with the client's processes to ensure maximum efficiency and user adoption.
- Customisation - Customisation is achieved through the development of custom components and logic using APEX, Lightning Web Components (LWC) and declarative tools like Salesforce Flows, workflows and approval processes. This includes configuring custom objects, data models and automation to streamline workflows, enforce business rules and enhance user experience. The goal is to build a system that not only reflects the organisation's operations but also simplifies complex tasks through automation and intuitive interfaces.
- Enhancements - Enhancement initiatives often include integrating AI-driven capabilities to elevate system intelligence and decision-making. By leveraging Salesforce Einstein or custom AI models, the platform can deliver predictive analytics, intelligent case triage, data-driven insights and sentiment analysis. These innovations enable proactive engagement, smarter forecasting, and improved service delivery, ensuring Salesforce evolves in line with business growth and technological advancement.

- **Data Management & Integration**

- Data Management - This service area ensures that Salesforce operates as the single source of truth by maintaining high data quality, seamless system connectivity and powerful reporting capabilities. It begins with secure data migration, meticulously cleansing, mapping and preparing datasets from legacy systems or other CRMs for use within Salesforce. This process includes deduplication, validation and transformation of records to ensure accuracy, consistency and compliance with data protection standards such as GDPR. The result is a clean and reliable data foundation that supports smooth system adoption and long-term operational efficiency.
- Data Integration - Integration is a key component, connecting Salesforce CRM and Experience Cloud portals with essential enterprise systems such as ERP, HR, Finance and bespoke legacy applications. Using APIs, middleware solutions like MuleSoft, or other integration tools, we design and implement robust data flows that provide users with a unified, real-time view of critical business information. This eliminates data silos, reduces manual entry and enables automated, cross-system processes that enhance productivity and accuracy.
- Dashboard Reporting - Additionally, we deliver comprehensive dashboarding and reporting solutions that turn data into actionable intelligence. By configuring Salesforce Reports, Dashboards, and Analytics (including Tableau CRM where appropriate), we empower stakeholders with visibility into KPIs, compliance metrics, and performance trends. This ensures informed, data-driven decision-making across departments—supporting strategic planning, regulatory compliance, and continuous improvement.

- **Continuous Improvement & Governance**

- Continuous Improvement - Our Continuous Improvement & Governance service ensures that Salesforce remains strategically aligned with evolving business goals while maintaining strong operational control, data integrity and user adoption. We provide an ongoing review of system usage, user feedback and business processes to identify areas where Salesforce functionality can be optimised or expanded. This includes analysing performance metrics, automation efficiency and user engagement to propose enhancements that increase productivity, streamline workflows and deliver measurable business outcomes.
- Governance - Governance is at the heart of maintaining a secure and compliant Salesforce ecosystem. We establish clear governance frameworks that define standards for data quality, system access and security protocols in line with organisational and regulatory requirements. This includes setting up role-based permissions, audit controls and compliance reporting structures to ensure transparency and accountability across the platform. Our governance model promotes consistent usage practices, reducing risk while maximising system value.

- Knowledge transfer - We also focus on empowering in-house teams through structured knowledge transfer and targeted training. By building internal capability and confidence, we help clients reduce long-term dependency on external support while fostering a culture of continuous learning and ownership. This approach ensures that Salesforce remains not just a technology solution, but a continuously improving business enabler, adapting alongside organisational growth and change.
- **Scalable & Secure Service Delivery**
 - Our Scalable & Secure Service Delivery model is designed to evolve in line with our clients changing needs, whether that's organisational growth, new policy directives or the introduction of innovative initiatives. We provide a flexible support framework that can expand or adapt without disruption, ensuring that Salesforce services remain aligned with evolving business priorities. This scalability extends across all aspects of delivery, from user volume and functionality to integrations and automation, enabling seamless transitions as organisational requirements mature.
 - Security and compliance form the backbone of our service delivery. We operate to the highest standards of data protection and system governance, implementing robust access controls, encryption and monitoring to safeguard sensitive information. Our approach adheres to industry best practices and compliance frameworks such as ISO 27001 and GDPR, ensuring full accountability and traceability across every interaction.
 - This disciplined, security-first delivery approach is particularly vital for public sector and other regulated environments, where maintaining trust, confidentiality and data integrity are paramount. By combining scalable infrastructure with a rigorous security posture, we ensure that clients can confidently rely on Salesforce as a stable, compliant and future-ready platform, capable of supporting mission-critical operations without compromise.

Cloud Characteristics Delivered by the Service

- On-demand Self-Service & Elasticity: The service supports expansion of the Salesforce platform (new users, modules, integrations) without heavy upfront investment.
- Broad Network Access: Support can be provided remotely, across multiple locations and devices, enabling distributed teams and mobile users.
- Resource Pooling & Multi-Tenant Support: Although the client environment is dedicated, underlying platform benefits from managed service efficiencies (updates, monitoring, shared expertise).
- Rapid Elastic Scalability: Ability to accommodate increases in workload (e.g., new use-cases, departments) through modular addition of capabilities.
- Measured Service & Monitoring: Defined SLAs, performance metrics, dashboards for visibility of platform health and usage.

- Enhanced Resiliency & Compliance: Built-in by utilising Salesforce infrastructure combined with CodM's operational support to maintain availability, integrity and data protection.

CodM Software Limited's Salesforce support and managed services deliver a wide-ranging set of operational, strategic and workforce-focused benefits designed specifically for public sector organisations seeking stability, efficiency and innovation at scale. Key benefits include:

- Significant Improvements in Operational Efficiency through end-to-end workflow automation, intelligent routing, reduced duplication of effort and streamlined cross-team processes. This drives faster turnaround times, fewer bottlenecks and more predictable service delivery across departments.
- Advanced Data-Driven Decision-Making enabled by unified, analytics-ready data models that consolidate information from multiple systems. Leaders gain real-time visibility, predictive insights and evidence-based intelligence to improve policy development, resourcing and performance management.
- A Superior User and Stakeholder Experience due to a well-configured Salesforce environment that ensures faster responses, reduced error rates and personalised interactions. Staff, citizens and partners benefit from smoother journeys, clearer communication and more reliable outcomes.
- Accelerated User Enablement and Adoption through structured onboarding, tailored training plans, ongoing coaching and accessible support channels that ensure users quickly become confident, productive and self-sufficient on the platform.
- Enhanced Workforce Productivity Powered by AI including automated triage, sentiment analysis, predictive recommendations and generative automation. These capabilities significantly reduce manual case-handling time and free staff to focus on higher-value activities.
- Stronger Governance, Auditability and Regulatory Compliance supported by robust data controls, permission frameworks, monitoring practices and security alignment with public sector standards. This reduces the risk of breaches, misconfigurations and compliance failures.
- Highly Scalable, Future-Proof Architecture that allows organisations to expand services, onboard new user groups, add modules and respond to legislative, operational or demand-based changes, without the need for major infrastructure investment or platform rework.
- Reduced Risk Exposure and Lower Long-Term Support Costs through proactive monitoring, preventative maintenance, optimisation of best practices and fewer major incidents. This stabilises the environment and maximises the value of the organisation's Salesforce investment.
- A Secure and Continuously Compliant Platform aligned with public sector expectations around data protection, audit trails, operational continuity and controlled access, ensuring sensitive information always remains protected.
- Higher Staff Productivity through Intuitive Tools that simplify complex tasks, reduce administrative workload and enable teams to work more efficiently using automated workflows, guided processes and user-friendly interfaces.

- Enhanced Platform Resilience and Reliability driven by predictive performance tuning, early detection of configuration issues, ongoing health checks and real-time monitoring of integrations, API consumption and automation behaviour.
- A Culture of Continuous Improvement fostered by regular service reviews, insight-driven recommendations, technical optimisation and collaborative road mapping — ensuring the platform evolves in line with organisational priorities and sector changes.
- Foundation for Innovation and Next-Generation Services through the strategic integration of generative AI, advanced automation, reusable components and Salesforce’s evolving feature set, enabling organisations to modernise services and deliver more impactful citizen outcomes.

Associated Services

CodM Software Limited provides a complete suite of Salesforce-related support and professional services designed to help public- and private-sector organisations implement, operate, and continuously improve their Salesforce environments. Our offering covers every stage of the Salesforce lifecycle — from design and build to optimisation and long-term support.

Included Services

1. Implementation and Configuration

- Setup and deployment using Microsoft Azure, Github and DevOps of Salesforce CRM Clouds such as Sales cloud, Service cloud, Experience cloud, Education Cloud, Field Service Lightning, Pardot, Industries cloud using OmniStudio.
- Custom object design, page layouts, Lightning apps, record types, validation rules, and automation workflows.
- Integration of AI features such as Einstein Agentforce, predictive analytics, chatbots, and custom LLMs.

2. System Integration and APIs

- Development and configuration of REST/SOAP APIs, Middleware (MuleSoft, Dell Boomi, etc.), and data connectors to link Salesforce CRM with ERP, HR, Finance, and legacy systems.
- Integration with third-party applications including Outlook, Teams, SharePoint, and Google Workspace.
- Support for custom API development and event-driven architecture using Platform Events and Apex REST.

3. Data and Storage Management

- Data migration, cleansing, de-duplication and validation.

- Secure management of large datasets, ensuring performance and compliance with UK data protection standards.
- Assistance in optimising Salesforce storage (archiving, compression, external storage integration).

4. Managed Support and Maintenance

- Ongoing Salesforce administration and performance monitoring.
- Regular system health checks, security reviews, patching, and version updates.
- Bug resolution, incident management, and user-support desk services.
- Proactive optimisation and release management aligned with Salesforce seasonal updates.

5. Professional and Advisory Services

- Business analysis, solution design, and roadmap planning for digital transformation.
- AI and automation strategy consulting within Salesforce CRM ecosystems.
- Governance, compliance, and change management guidance.
- End-user and admin training, documentation, and knowledge transfer.

6. Development and Bolt-On Services

- Custom app development using Apex, LWC (Lightning Web Components), and Visualforce.
- Creation of reusable bolt-ons and accelerators to extend standard Salesforce functionality.
- Salesforce AppExchange app development and publishing.
- Integration of third-party AI/ML solutions, analytics, and reporting dashboards.

7. Environment and Release Management

- Sandbox setup and management, deployment strategy, and CI/CD pipeline automation (e.g., Gearset, Copado).
- Version control integration with GitHub/Bitbucket.
- Full support for metadata deployments and rollback processes.

Not Included

- Licensing costs for Salesforce products or third-party applications (these are procured directly from Salesforce or authorised resellers).
- Hosting outside of the Salesforce platform.
- Management of non-Salesforce software infrastructure unless specifically agreed as part of integration scope.
- End-user devices, on-premises hardware, or network configuration.

Optional Add-On Services (Available on Request)

- AI model training and fine-tuning using customer data.
- UX/UI design for Salesforce Experience Cloud portals.
- Data archiving solutions with external cloud storage providers (e.g., AWS, Azure).
- Security reviews and Health Assessments for existing Salesforce implementations.
- Rapid response support for critical incidents or major release changes.

The above optional add-on services are available on request and will be charged on an hourly basis in accordance with the rate card.

2. Data Protection

Information Assurance

CodM Software Limited is committed to maintaining a secure, compliant, and well-governed operational environment that protects the confidentiality, integrity, and availability of client data. While CodM does not currently hold ISO 27001 certification, our internal processes and technical controls are aligned to recognised industry standards and public-sector security expectations.

CodM adopts a risk-based approach to information assurance that incorporates:

- **Industry-Standard Security Practices:** We follow established security frameworks and best-practice principles including least-privilege access, secure development practices, data minimisation, and continuous monitoring of our operational environment.
- **Secure Handling of Client Data:** All data accessed or processed as part of the service remains within the client's Salesforce environment. CodM engineers do not extract, store, or retain client data outside the platform unless explicitly requested and contractually agreed.
- **Access Control and Authentication:** Access to client environments is restricted to authorised personnel only, safeguarded by strong authentication policies, role-based permissions, and time-bound access approvals.
- **Compliance with Public Sector Standards:** We adhere to relevant UK Government and public-sector guidelines, including principles from the NCSC, the Data Protection Act 2018, and UK GDPR, ensuring that all activities meet security and privacy requirements.
- **Secure Change and Release Management:** All development, configuration and administrative activity is conducted using controlled processes, validated in sandbox environments, and reviewed prior to deployment to minimise risk.
- **Continuous Security Awareness:** All CodM staff receive ongoing training on data protection, secure handling practices, phishing awareness, and compliance responsibilities to ensure a strong security culture is maintained.

- **Protection Against Threats and Vulnerabilities:** We conduct regular internal checks, apply vendor-recommended security updates promptly, and ensure that our tools and processes remain aligned with modern security expectations.
- **No Unauthorised Data Storage:** CodM does not maintain copies of client data, credentials or sensitive information outside approved secure methods. Any temporary data used during support activities is destroyed when no longer required.

CodM Software Limited is registered with the Information Commissioner's Office (ICO) as a data controller, demonstrating our commitment to safeguarding personal data and operating transparently under UK GDPR and the Data Protection Act 2018. Our ICO registration ensures that we follow legally required data protection principles, maintain accountability for how personal information is handled, and provide clients with assurance that their data is managed responsibly and in accordance with UK regulatory obligations.

Data Back-Up and Restoration

CodM Software Limited takes a structured and proactive approach to preventing data loss within Salesforce environments. Our data protection strategy combines Salesforce's native security architecture with additional governance, monitoring, and backup procedures managed through our support service.

Data Protection Measures

- Salesforce provides enterprise-grade data protection through multi-layer redundancy, encryption at rest and in transit (TLS 1.2+), and replication across geographically separate data centres.
- CodM Software complements this with scheduled metadata and data backups, retention policies, and controlled restoration procedures aligned with each client's requirements.
- Access to production data is strictly role-based, and all administrative actions are logged and auditable.
- Data integrity is safeguarded through change tracking, field-level history, and automated error detection where applicable.

Backup Frequency and Control

- Full system backups (data and metadata) are typically performed daily, with differential backups available hourly or weekly, depending on the service level agreed with the client.
- Point-in-time recovery options are available using Salesforce CRM Backup & Restore tools or trusted partner solutions.
- Backup storage can be maintained within Salesforce, external cloud environments (e.g. AWS, Azure, Google Cloud), or the buyer's preferred secure location.
- Clients can define their own backup schedules, data scopes, and retention durations as part of the onboarding process. These preferences are formally recorded in the agreed Order Form or Service Level Agreement (SLA).

Review, Testing and Continuous Improvement

- Backup and recovery procedures are reviewed quarterly and tested at least annually, or more frequently for high-availability environments.
- Simulated recovery tests confirm data integrity, completeness, and restoration performance.
- All processes are updated following Salesforce seasonal releases or whenever new features, security controls, or regulatory standards become available.
- Incident response and escalation plans are also reviewed and communicated to clients as part of ongoing service governance.

Client-Specific Flexibility

Before an order is placed, CodM Software engages with each client to confirm data classification, retention, and backup requirements. These parameters including schedule, storage method, and recovery objectives are agreed jointly and documented in the Order Form.

Business continuity statement/plan

CodM Software Limited maintains a structured Business Continuity and Disaster Recovery (BCDR) framework to ensure uninterrupted delivery of Salesforce support and related services. The plan defines how critical functions are maintained in the event of system disruption, data loss, or other incidents affecting service delivery.

Scope of the Plan

The continuity plan covers all operational activities related to:

- Salesforce CRM managed support, development, and integration services.
- Access to client environments, data handling, and backup processes.
- Internal systems required for project delivery, communication, and ticket management.
- Third-party dependencies such as Salesforce CRM platform services, cloud hosting providers, and communication tools (e.g., Microsoft 365, Slack, Zoom).

Key Business Areas and Critical Functions

- Service Operations: Ongoing Salesforce CRM project support, monitoring, and incident resolution.
- Development and Deployment: Configuration, Customization, release management, and version control of client solutions.
- Data and Security Management: Data backup, recovery, and compliance monitoring.
- Client Communication and Governance: Reporting, ticket tracking, and escalation management.

- Knowledge and Documentation Management: Maintenance of process documentation, training materials, and solution repositories.

Dependencies

- The company's operational continuity depends on secure and stable access to the Salesforce platform and associated cloud infrastructure.
- Internal delivery systems rely on encrypted cloud storage and secure connectivity.
- Staff continuity is supported through remote-working capability and redundant collaboration tools.
- Backups and client data are stored in multi-region cloud environments to avoid single-point failures.

Acceptable Downtime

- Salesforce CRM Support and Monitoring: Maximum acceptable downtime – 4 hours.
- Data Backup and Recovery: Maximum acceptable downtime – 12 hours for restoration.
- Client Communication Channels: Maximum acceptable downtime – 2 hours (alternate channels immediately activated if outage occurs).
- Internal Project Systems: Maximum acceptable downtime – 8 hours.

These thresholds may be refined in line with the buyer's operational requirements and documented within the agreed Service Level Agreement (SLA).

Outline Plan to Maintain Operations

- Redundant systems and multi-region cloud backups ensure access to essential environments during disruption.
- Remote access and secure VPN connections allow continuity of service from alternative locations if a primary site becomes unavailable.
- Incident escalation protocols assign clear roles and responsibilities for recovery coordination.
- Communication plans ensure that clients are promptly informed of any service interruption and provided with estimated recovery times.
- Regular testing and scenario simulations verify the effectiveness of continuity measures and staff readiness.

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

Privacy by Design

CodM Software Limited embeds privacy and data protection principles into every stage of its Salesforce service delivery lifecycle from design and configuration through deployment, support, and continuous improvement. Our approach ensures that personal and sensitive

data handled through Salesforce solutions are managed lawfully, fairly, and transparently in accordance with the UK GDPR and the Data Protection Act 2018.

Proactive Privacy Approach

- **Design Stage:** Every project begins with a Data Protection Impact Assessment (DPIA) to identify potential privacy risks and ensure appropriate safeguards are designed before implementation.
- **Data Minimisation:** Only the minimum necessary personal data required for business processes are collected and processed.
- **Role-Based Access Control:** Access to personal data within Salesforce environments is restricted based on user roles, ensuring that staff can only access information relevant to their duties.
- **Anonymisation and Pseudonymisation:** Where possible, identifiable data is masked or pseudonymised during testing, analytics, or integration activities.
- **Audit and Logging:** All system and data-access activities are recorded for accountability and traceability.

GDPR Principles in Practice

CodM Software adheres to the core GDPR principles of lawfulness, fairness, transparency, purpose limitation, data minimisation, accuracy, storage limitation, integrity, and confidentiality.

- **Consent Management:** Salesforce capabilities are configured to support consent tracking, preference centres, and lawful processing records.
- **Right to Access, Erasure and Portability:** Our data models and processes support the exercise of individual rights under Articles 15–20 of the GDPR.
- **Retention and Deletion Policies:** Automated data-retention schedules ensure that personal data is not stored longer than necessary.
- **Third-Party Processing:** All third-party suppliers or sub-processors undergo due diligence to ensure equivalent GDPR compliance and data-handling standards.
- **Secure Data Transfers:** Where applicable, data transfers outside the UK or EEA are managed using approved safeguard mechanisms such as standard contractual clauses.

Ongoing Governance and Assurance

- Regular privacy and security reviews are conducted as part of our managed support services.
- Staff receive periodic data-protection and confidentiality training to ensure awareness and compliance.
- Incident response and breach notification procedures are maintained and tested in line with legal requirements.
- Clients are fully informed of data flows, storage locations, and access levels through project documentation and onboarding sessions.

By integrating privacy controls directly into our design, configuration, and delivery processes, CodM Software Limited ensures that all Salesforce CRM solutions are secure, compliant, and aligned with the principles of privacy by design and by default.

3. Using the service

Ordering & Invoicing

To discuss your requirements in more detail and place an order please contact Info@codmsoftware.co.uk. When you email us, it is helpful if you include:

- A brief description of your organisation and procurement route (e.g., via G-Cloud Framework, Lot 3)
- The services you are interested in (e.g., Salesforce implementation, integration, managed support)
- Anticipated start date and approximate scope (number of users, number of systems, integration requirements)
- Any special compliance or security requirements (e.g., IL2/IL4 assurance, public-sector service constraints)
- Your preferred contract term, budget or any milestones you need

We will then provide a tailored Order Form / Call-off Contract for your review, which captures the scope of work, pricing, service levels, deliverables and any agreed exclusions. We are happy to assist you in completing this documentation and ensure the Order Form is aligned with your internal procurement and audit requirements.

Fees & Invoicing

Our fees are invoiced in arrears. Payment terms are 30 days net of receipt of invoice unless otherwise agreed in writing. Contract start will normally commence following signature of the Order Form and acceptance of any initial project kick-off or onboarding schedule.

Availability of Trial Service

CodM Software Limited recognises that some buyers may wish to evaluate the suitability of Salesforce solutions or assess our service approach before committing to a full engagement. To support this, we offer discretionary trial and proof-of-concept (PoC) engagements, available under agreed terms and scope.

Trial or Introductory Usage

- Short-term trial environments or sandboxes can be provisioned to demonstrate key Salesforce features, integrations or AI capabilities (subject to Salesforce licensing).
- Trial engagements typically focus on limited use cases — for example, workflow automation, data migration testing or dashboard/reporting validation.

- Trials are designed to validate feasibility, usability and alignment with business requirements before moving to full-scale implementation.
- Where applicable, we can assist buyers in obtaining temporary Salesforce evaluation licenses directly from Salesforce.

Proof of Concept (PoC) Engagements

- PoC projects are available for organisations seeking to confirm technical viability, integration compatibility or measurable outcomes.
- PoC's are scoped collaboratively and delivered under a fixed-duration and fixed-cost structure.
- Each PoC includes documentation of outcomes, performance metrics and recommendations for next steps.
- If the buyer proceeds to full implementation, elements of the PoC may be re-used or credited toward the subsequent delivery phase.

Conditions and Availability

- Trial or PoC services are provided subject to resource availability and mutual agreement of objectives and timelines.
- These services are typically offered remotely, using Salesforce sandbox environments or secure test instances.
- Access to CodM Software's support team, consultants and technical documentation is included during the trial period.
- All data used during a trial or PoC is either sample data or anonymised unless otherwise agreed in writing.
- On completion, any temporary access, credentials or test environments are securely decommissioned.

Buyers interested in trial or PoC activities can contact info@codmsoftware.co.uk to discuss objectives, timescales and scope prior to initiating the service.

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

On-boarding Process

CodM Software Limited follows a structured on-boarding process designed to ensure a smooth transition into our Salesforce CRM support and managed services. The process is flexible and can be adapted to meet each buyer's operational and governance requirements.

Typical on-boarding activities include:

1. Kick-off and Planning
 - A formal kick-off meeting is held with the client's key stakeholders and CodM Software's project team.

- Objectives, timelines, communication channels and governance structure are agreed at this stage.
- A dedicated Customer Success Manager (CSM) and Technical Lead are assigned to act as the client's main points of contact.
- 2. Requirements and Environment Review
 - Review of existing Salesforce environments, integrations and data structures.
 - Identification of dependencies, risks and any required migration or configuration work.
- 3. Migration and Setup
 - Secure migration or integration setup is performed in line with the agreed plan.
 - User roles, profiles and access controls are configured according to client security policies.
 - Sandbox environments are established where required for testing and change validation.
- 4. Training and Enablement
 - Tailored training sessions are provided for administrators, end-users and technical staff.
 - Documentation covering processes, support contacts and escalation procedures is shared.
 - Knowledge transfer ensures client teams can effectively manage day-to-day operations.
- 5. Initial Support Period
 - Clients receive enhanced onboarding support (typically for the first 60–90 days) to ensure stability and user adoption.
 - Regular check-ins are conducted to address issues, gather feedback and confirm that all requirements have been met.
- 6. Account Management and Ongoing Support
 - After the onboarding phase, clients continue to have access to their assigned Account Manager and support desk for ongoing assistance, service reviews and roadmap planning.

Support during Service

CodM Software Limited provides comprehensive, proactive support throughout the duration of the Salesforce CRM support and managed service engagement. Our delivery model combines structured service management, transparent communication and continuous optimisation to ensure the buyer receives consistent, high-quality service aligned with their evolving business needs.

Typical in-service support activities include:

1. Service Desk & Incident Management
 - Clients have access to a dedicated support desk for logging incidents, service requests, and change requests.

- All tickets are triaged, prioritised and handled in accordance with agreed SLAs.
 - Issues are resolved through a combination of remote troubleshooting, configuration changes, advisory support and escalation to Salesforce where required.
 - Clear updates are provided throughout the ticket lifecycle to ensure transparency and confidence.
2. Proactive Monitoring & Preventative Maintenance
- Regular health checks are performed on Salesforce environments to identify risks, optimisation opportunities, or configuration issues.
 - Monitoring includes validation of integration performance, API limits, governor limits, key workflows, and user access anomalies.
 - Preventative actions are taken to avoid instability, downtime, or data quality issues.
3. Release & Change Management
- CodM Software manages all Salesforce seasonal releases (Spring, Summer, Winter), including reviewing release notes and assessing the impact on the buyer's org.
 - Changes requested by the buyer follow a controlled change management process with testing, UAT, deployment planning and rollback strategies.
 - Deployment tools such as Gearset, Salesforce DevOps Centre or client-approved methods are used to ensure secure, auditable delivery.
4. Configuration Enhancements & Continuous Improvement
- Minor enhancements, configuration updates and optimisation tasks are delivered as part of managed services (depending on package tier).
 - CodM Software identifies opportunities to improve automation, user experience, reporting, data accuracy and system performance.
 - Recommendations are shared during review meetings and executed following client approval.
5. Service Reviews & Account Management
- Regular service reviews are conducted (monthly or quarterly) to evaluate performance, discuss upcoming business requirements and review KPIs.
 - A dedicated Account Manager or CSM ensures alignment between the client's strategic objectives and the ongoing service.
 - Roadmap planning is supported to help clients leverage new Salesforce capabilities or plan for larger transformation initiatives.
6. User Support & Enablement
- Ongoing training sessions, refresher workshops or "ask-me-anything" sessions can be delivered upon request.
 - Updated documentation is provided for new features, process changes and best-practice guidance.
 - Support is available for admin teams, end-users and technical stakeholders to ensure smooth day-to-day usage.
7. Integration & Data Support
- Monitoring and troubleshooting support is provided for integrations between Salesforce and external systems.

- Assistance is available for data loads, data cleansing, duplicate management and validation rule optimisation.
- API or middleware-related incidents are escalated promptly to ensure continuity of connected processes.
- 8. Security, Compliance & Governance
 - Regular reviews of roles, profiles, permissions and access controls are conducted to maintain compliance with buyer security policies.
 - Support is provided for audit activities, logging, environment access governance and data protection requirements.
 - CodM ensures that all activities adhere to Salesforce's platform governance and the buyer's internal IT policies.

Off-boarding Process

CodM Software provides a controlled off-boarding process to ensure clients can transition smoothly away from our service without data loss or operational disruption.

Typical off-boarding activities include:

1. Notice and Planning
 - Clients are requested to provide written notice of termination in accordance with the contract (typically 30 days unless otherwise specified).
 - A joint off-boarding plan is created covering timelines, deliverables, data handover and access removal.
2. Knowledge Transfer and Data Export
 - Clients can export their data directly from Salesforce using standard tools (e.g. Data Export, API, or Data Loader).
 - CodM Software can provide additional assistance for data extraction, migration scripts or documentation at the client's request.
 - All knowledge base materials and configuration documentation are handed over prior to service closure.
3. Access and Decommissioning
 - User accounts, integrations and service access are securely disabled at the end of the off-boarding period.
 - Backup copies (where agreed) are retained for a defined retention period before being securely deleted.
4. Optional Exit Support (Additional Service)
 - For complex environments, CodM Software can offer exit support at additional cost and will be charged on an hourly basis as per the rate card.
 - This may include data transformation for import into another CRM, technical consultancy for migration planning, or parallel support during a transition period.

CodM Software's goal during both on-boarding and off-boarding is to maintain continuity, minimise downtime and ensure the client always retains full control and ownership of their data and configuration.

Training

CodM Software Limited provides a structured approach to user training and enablement to ensure smooth adoption of Salesforce solutions and supporting services. Training is available as part of onboarding and can be extended throughout the service lifecycle based on buyer requirements.

Training Facilities and Delivery Options

- **Online Training and Virtual Workshops:** Delivered through secure video conferencing tools (e.g., Microsoft Teams, Zoom). These sessions are interactive and can include demonstrations, Q&A and walkthroughs of live Salesforce environments.
- **Instructor-Led Sessions:** Conducted by certified Salesforce professionals covering system functionality, data management and day-to-day operations.
- **Self-Service Resources:** Access to user guides, quick-reference materials, recorded sessions and FAQ documents tailored to the buyer's configuration.
- **Knowledge Transfer Sessions:** Conducted at the end of major implementation phases or during transition to ensure in-house teams can maintain and extend the solution confidently.

Introductory and On-boarding Orientation

- All new clients receive an orientation and familiarisation session during the onboarding phase.
- This includes a walkthrough of the service scope, support processes, escalation procedures and key contact points (Customer Success Manager, Service Desk, Technical Lead).
- Where appropriate, we demonstrate navigation of the Salesforce instance, review configured features and highlight how to access help and report issues.
- Introductory sessions are normally delivered remotely and can be repeated for new users or departments during the early adoption period.

CodM Software's training approach ensures that every user, whether technical, administrative or business facing, has the knowledge and confidence to use Salesforce effectively from day one, with accessible support resources available throughout the service lifecycle.

Implementation Plan

CodM Software Limited follows a structured and transparent approach to Salesforce CRM implementation and transition projects. Each engagement is planned in collaboration with the buyer to ensure alignment with objectives, timelines, and governance processes.

Typical activities include:

- **Discovery and Planning:** Define scope, goals and technical requirements.

- **Design and Configuration:** Configure Salesforce environments, data models and integrations to meet business needs.
- **Testing and Validation:** Conduct functional, user and performance testing to confirm solution readiness.
- **Deployment and Go-Live:** Migrate to production with minimal disruption, supported by a dedicated technical team.
- **Post-Go-Live Support:** Provide hyper care, documentation and handover to business-as-usual operations.

Projects are managed using agile delivery principles, with clear communication, milestones, and quality checkpoints throughout.

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

Service Management

CodM Software Limited manages its Salesforce Cloud Support services using a structured IT Service Management (ITSM) framework based on ITIL v4 principles. Our approach integrates people, processes and technology to ensure services are planned, delivered, operated and continually improved in alignment with customer objectives.

People and Roles

- Each engagement is overseen by a Service Delivery Manager (SDM) who acts as the primary point of contact for the buyer.
- The SDM is supported by certified Salesforce Administrators, Developers and Architects responsible for technical delivery and issue resolution.
- A Customer Success Manager (CSM) provides account-level coordination, progress reporting and client satisfaction tracking.
- Where onsite or hybrid delivery is required, a Consultant Lead manages team activity, ensuring adherence to project governance and security protocols.

Processes and Governance

- Our ITSM framework follows the Plan–Do–Check–Act cycle to ensure continual improvement.



- Service processes include Incident Management, Change Management, Request Fulfilment, Problem Management and Release Management.
- Standard Service Level Agreements (SLAs) define response and resolution times for incidents and requests.
- A structured Change Control Process ensures that modifications to configurations, integrations or data models are assessed, approved and tested before deployment.
- Periodic Service Review Meetings are held with the buyer to review performance, discuss enhancements and capture lessons learned.

Technology and Tooling

- CodM Software utilises secure cloud-based service-desk tools to log, prioritise, and track incidents and requests.
- Buyers have access to a single point of contact (info@codmsoftware.co.uk) for all queries, service requests and escalation.
- Automated monitoring and analytics tools are used to track service health, response performance and change success rates.
- Reporting dashboards provide visibility into open incidents, SLA adherence and service trends.

Service Continuity and Incident Handling

- All incidents are triaged by the service desk and assigned based on priority and impact.
- Major incidents trigger predefined escalation paths and communication protocols to keep the buyer informed until resolution.
- Root-cause analysis is performed after critical issues, with findings incorporated into the continual-improvement plan.
- Business continuity is supported through backup systems, redundant infrastructure and documented recovery processes.

Standards and Continuous Improvement

- CodM Software aligns its operations with ISO 27001 (Information Security Management) and ISO 9001 (Quality Management) principles.
- Regular internal reviews, customer feedback and service-performance analysis drive continuous process enhancement.
- Post-implementation reviews and quarterly service assessments ensure that improvements are documented, implemented and communicated.

CodM Software's service management model ensures every Salesforce CRM support engagement is controlled, transparent and outcome-focused, with clear accountability and consistent service quality.

Service Constraints

CodM Software Limited delivers its Salesforce support and development services within a controlled and transparent operational framework. The following constraints define the conditions, dependencies, and limitations that apply to the delivery of the service.

1. Platform Dependencies

- The service operates within the Salesforce ecosystem and is therefore subject to Salesforce's own platform availability, maintenance windows, and release schedule.
- Access to certain features or tools may depend on the buyer's Salesforce licence type or edition.
- External system integrations (e.g., ERP, HR, or finance systems) rely on those systems being available and accessible to CodM Software under the buyer's authorisation.

2. Access and Security Requirements

- CodM Software requires appropriate access to the buyer's Salesforce environment, test sandboxes, and relevant APIs to perform configuration or support tasks.
- Any administrative access is granted under the buyer's security policy and can be time-limited or restricted to approved personnel.
- All work follows the buyer's information-security and change-control policies to ensure compliance and auditability.

3. Change and Release Management

- Major or high-impact changes are implemented only following joint approval and may be subject to buyer change freezes or scheduled maintenance periods.
- Implementation of third-party add-ons, integrations, or connectors outside the Salesforce platform may require additional testing and approval from the buyer.
- Where multiple suppliers are involved in the buyer's environment, CodM Software will coordinate activity but is not responsible for dependencies managed by other vendors.

4. Data Handling and Compliance

- Buyers remain data controllers under the UK GDPR and are responsible for determining lawful processing and retention policies.
- CodM Software acts as a data processor and will not retain, transfer, or modify data outside the agreed purpose or jurisdiction.
- Temporary data extracts used for migration or testing are securely deleted after project completion or in line with the contract.

5. Environmental and Technical Preconditions

- The buyer is responsible for maintaining valid Salesforce licences and ensuring that environments are provisioned and accessible.
- Internet connectivity, VPN configuration, and internal firewall settings required for remote support remain the buyer's responsibility.
- CodM Software cannot be held responsible for downtime or data loss resulting from third-party infrastructure failures outside its control.

6. Collaborative Working

- Effective service delivery depends on timely responses from the buyer's nominated contacts for issue resolution, testing sign-off, and approvals.
- Delays in feedback or access can affect delivery timescales; such impacts are discussed transparently and mitigated where possible.

Service Levels

CodM Software Limited provides clearly defined service levels to ensure transparency, reliability and accountability in the delivery of Salesforce support and managed services. These service levels define how performance, availability, incident response and resolution targets are managed and reported.

Specific SLAs can be adjusted to meet the buyer's operational needs and will be agreed and documented prior to contract signature.

Performance and Availability

- Salesforce's global infrastructure provides a platform availability target of 99.9%, excluding scheduled maintenance.
- CodM Software's managed-support platform (ticketing, communication, and monitoring tools) operates with a target availability of 98.5%.
- Service performance is monitored continuously, and buyers receive performance and uptime metrics during scheduled service reviews.

Support Hours

- Standard Support Hours: Monday – Friday, 09:00 to 17:30 UK time (excluding UK public holidays).
- Out-of-Hours or Weekend Support: Available by prior agreement as an optional service for critical or continuous-operation environments.
- Incidents logged outside core hours are acknowledged at the next business opening unless designated as critical under escalation.

Severity and Response Targets

Severity Level	Description	Target Response Time	Target Resolution Time
Critical P1	Complete service outage or major functionality loss affecting all users.	1 hour	4 hours (workaround or restoration)
High P2	Significant degradation or partial loss of service affecting key business functions.	2 hours	1 Business days
Medium P3	Isolated issue, minor performance problem, or feature malfunction with workaround available.	4 hours	2 Business days
Low P4	General enquiry, non-urgent change request, or cosmetic issue.	24 hours	As scheduled

Escalation Path

- Buyers have a single point of contact via info@codmsoftware.co.uk for all service requests and escalations.
- Escalations follow a structured path: Service Desk → Technical Lead → Service Delivery Manager → Director.
- Major incidents trigger a formal communication plan with regular status updates until resolution.

Service Review and Reporting

- Monthly performance reports include SLA compliance, incident statistics and change history.
- Quarterly Service Review Meetings are held with the buyer to review performance, risks and improvement actions.

- Continuous improvement activities are tracked and documented as part of CodM Software's ITIL-aligned Service Management framework.

Service levels may be tailored to individual buyer requirements. Appropriate SLAs, performance targets and escalation procedures will be discussed and agreed prior to an order being placed and documented in the Order Form as agreed between both parties.

Outage and Maintenance Management

CodM Software Limited applies a proactive, preventative approach to minimise the risk of technical issues or delays across all Salesforce support and development services. Our risk management and performance-assurance framework combine monitoring, redundancy, governance and structured escalation to maintain continuity and performance throughout the service lifecycle.

Outage Avoidance

- Salesforce's multi-tenant cloud infrastructure provides built-in redundancy and automatic failover across geographically separate data centres, helping to prevent single-point failures.
- CodM Software supplements this with continuous environment health checks, error-log reviews and automated alerts for performance anomalies or configuration conflicts.
- Preventative maintenance schedules, patch testing and sandbox validation ensure that updates are applied safely before they reach the live environment.
- Change requests are deployed through a controlled release process with rollback capability and peer review to minimise risk of downtime.

Service Performance Planning

- Each engagement begins with capacity and performance assessment to define key thresholds (API usage, storage, concurrent users, automation load, etc.).
- Performance baselines are established early and tracked via dashboards and Salesforce's native Health Check and Optimiser tools.
- Predictive monitoring allows early detection of slow queries, process bottlenecks or integration delays before they affect users.
- Regular review meetings evaluate trends and recommend configuration tuning, load-balancing or process optimisation.

Downtime Measurement and Monitoring

- Downtime and service-degradation metrics are captured automatically via Salesforce system logs and CodM Software's monitoring tools.
- All incidents are logged with timestamp, duration and root-cause detail to ensure accurate Mean Time to Detect (MTTD) and Mean Time to Resolve (MTTR) reporting.

- These metrics are reviewed monthly and presented in service-performance reports as part of the continuous-improvement cycle.
- Any major incidents trigger a root-cause analysis and action plan to prevent recurrence.

Preparedness for Ad-hoc Service Needs

- CodM Software maintains flexible resource allocation, allowing additional certified consultants or developers to be deployed rapidly for urgent or unplanned requirements.
- Standby resources and pre-approved change windows enable response to sudden spikes in workload, integration issues or new feature rollouts without service disruption.
- A defined Rapid Response Framework ensures that ad-hoc requests are assessed, prioritised and delivered under appropriate governance without bypassing existing quality controls.
- Where necessary, additional capacity is arranged through our extended partner network to maintain continuity during high-demand periods.

Continuous Improvement

- Lessons learned from incidents, audits, and performance reviews are documented and fed into our improvement log.
- Regular updates to our monitoring tools, automation scripts, and deployment pipelines further reduce operational risk.
- CodM Software's ITIL-aligned processes ensure every improvement is tracked from identification through validation and implementation.

By combining proactive monitoring, disciplined change management and scalable support capacity, CodM Software Limited ensures that risks of technical issues, downtime and service delays are effectively mitigated, keeping buyer operations stable and uninterrupted.

Financial Recompense Model for not Meeting Service Levels

CodM Software Limited aims to consistently meet or exceed all agreed service levels. In the event that performance falls below the agreed targets, service credits may be applied as part of the buyer's Call-Off Contract or Order Form.

Policy and Approach

- Service credits are not automatically included by default but can be negotiated as part of the final Service Level Agreement (SLA) prior to contract signature.
- Credits are intended to provide fair compensation for measurable, verified breaches of agreed service levels (such as extended downtime or missed response/resolution targets).

- The calculation and threshold for service credits are mutually defined and documented in the Order Form or SLA.

Typical Framework (for illustration)

- If monthly uptime or SLA compliance falls below target, the buyer may receive a credit equivalent to 2–5% of the monthly service fee for each percentage point below the agreed target, capped at an agreed maximum (typically 15%).
- Credits are applied against future invoices or as an equivalent refund, depending on contractual terms.
- Service credits are not cumulative and represent the buyer's sole financial remedy for the specific performance shortfall.

Conditions

- Performance breaches must be verified using service-level reporting data shared with the buyer.
- Credits do not apply where failure is caused by:
 - Force majeure events or Salesforce platform outages beyond CodM Software's control.
 - Buyer-initiated delays, access restrictions, or third-party dependencies.
 - Planned or mutually agreed maintenance windows.

Agreement and Documentation

- Final service-credit terms are agreed between both parties during contract negotiation and formally recorded in the Order Form or Call-Off Contract.
- CodM Software remains committed to resolving all service issues quickly and transparently to minimise the likelihood of any credit invocation.

4. Provision of the service

Customer Responsibilities

Successful delivery of Salesforce services depends on effective collaboration and timely input from the buyer. The following obligations outline the key areas where buyer participation is required to support efficient service delivery and maintain agreed timelines.

1. Access and Permissions

- The buyer must provide CodM Software Limited with appropriate, secure access to the relevant Salesforce environments, sandboxes and connected systems required to perform support or development activities.
- Administrative credentials or API access tokens (where needed) should be provided to authorised CodM Software personnel under the buyer's security governance.

- Access may be time-limited or role-restricted in accordance with the buyer's information-security policy.

2. Information and Resources

- The buyer should supply accurate and complete information about existing systems, configurations, integrations and dependencies at project initiation.
- Key points of contact (e.g. system owner, data controller, project sponsor) must be identified and available to provide clarifications or approvals.
- The buyer is responsible for promptly communicating any changes to business processes, policies or systems that may affect service delivery.

3. Decision Making and Approvals

- The buyer must review and approve project deliverables, configuration changes and test results in a timely manner to prevent unnecessary delays.
- Escalation and approval hierarchies should be agreed during onboarding to ensure efficient governance and sign-off procedures.

4. Data Management

- The buyer remains the data controller under UK GDPR and is responsible for ensuring that personal data is lawfully processed within Salesforce.
- CodM Software acts as a data processor only and will follow the buyer's data-handling, retention and deletion policies.
- The buyer should maintain its own backup copies or retention policies if required by internal governance.

5. Infrastructure and Connectivity

- The buyer is responsible for maintaining its Salesforce licences, user accounts and overall platform subscription with Salesforce.
- Stable network connectivity, VPN configuration and access permissions for remote support must be maintained by the buyer's IT team.
- Any third-party systems or middleware that integrate with Salesforce must be available and functional for testing or support activities.

6. Testing and User Acceptance

- The buyer is expected to participate in User Acceptance Testing (UAT), providing feedback and sign-off before deployment to production.
- Test data and validation scenarios should be supplied by the buyer to ensure realistic and representative testing outcomes.

7. Collaboration and Communication

- The buyer must nominate project and operational contacts who can attend progress meetings, review reports and facilitate communication between teams.
- Delays caused by unavailability of key personnel, access restrictions or missing information may impact delivery timelines; such delays will be communicated transparently by CodM Software.

CodM Software Limited will make every reasonable effort to mitigate risks and maintain delivery timelines; however, the buyer's timely cooperation, access provision and decision-making are essential to the successful execution of the service.

Technical Requirements and Client-Side Requirements

To ensure successful implementation and operation of Salesforce services, certain technical and client-side prerequisites must be in place before delivery begins. These requirements will be reviewed and agreed with the buyer prior to contract signature and documented in the Order Form.

1. System and Platform Requirements

- The buyer must hold a valid and active Salesforce licence for each environment (production and sandbox) relevant to the project scope.
- Buyer systems must support modern web browsers (e.g. Microsoft Edge, Google Chrome, Safari, Firefox - latest two versions) and stable internet connectivity to access Salesforce cloud environments.
- Any third-party systems to be integrated (ERP, HR, Finance, or legacy platforms) must have available and functioning APIs or data-access interfaces.
- For integration work, the buyer must provide relevant API documentation, credentials and sandbox/test access to connected systems.

2. IT Infrastructure and Security Requirements

- Buyer environments must allow secure remote access by authorised CodM Software personnel, typically via VPN or approved identity federation (e.g. SSO, MFA).
- The buyer's firewall and network configurations should permit outbound and inbound connections to Salesforce endpoints and agreed integration platforms.
- Any required client-managed middleware, security gateway or proxy must be properly configured and accessible for integration testing.
- Local IT security policies must support installation or temporary use of monitoring agents or deployment tools, where applicable.

3. Resource and Availability Requirements

- The buyer must allocate sufficient internal resources (e.g. system owner, project manager, key users, and testers) to engage in workshops, testing, and review sessions.
- Adequate time commitment from subject-matter experts and data owners is required during design and UAT phases.
- Access to end-user representatives or champions should be provided for feedback during training and user adoption activities.

4. Data and Configuration Requirements

- Source data provided for migration or integration must be accurate, cleansed and in an agreed structured format (e.g. CSV, JSON, API feed).
- Data owners must confirm the legality of data transfer and processing under applicable data protection laws.
- Existing Salesforce environments should be maintained in a healthy and supported state prior to the commencement of work (e.g. valid certificates, sufficient storage, no expired licences).

5. Environmental and Operational Readiness

- The buyer must ensure stable connectivity and access during implementation windows and scheduled testing sessions.
- Any planned internal IT changes that could impact integration, access, or authentication should be communicated to CodM Software in advance.
- The buyer should provide necessary workspace or virtual meeting access for CodM Software's project team, depending on delivery mode (remote or onsite).

These technical and resource prerequisites are required to enable secure, efficient and uninterrupted service delivery. They will be reviewed jointly before the project begins and the final set of requirements will be documented in the Order Form as agreed between both parties.

After-sales Account Management

CodM Software Limited is committed to building strong, long-term partnerships with all customers through proactive account management, transparent communication and continuous service improvement. Our approach ensures that clients continue to receive value and measurable outcomes well beyond the initial delivery phase.

1. Dedicated Account Management

- Each client is assigned a Customer Success Manager (CSM) or Account Manager responsible for overall relationship management.
- The Account Manager acts as the central point of contact for service coordination, escalation and strategic planning.

- Regular contact is maintained through scheduled service reviews, performance reports and forward-planning sessions.

2. Ongoing Relationship and Communication

- CodM Software maintains open communication channels with all key stakeholders to ensure clarity on progress, performance and upcoming priorities.
- Clients receive periodic updates on Salesforce product changes, feature releases and best-practice recommendations relevant to their environment.
- Collaboration is supported through shared communication platforms (e.g. Teams, Slack, or agreed alternatives) for real-time updates and discussions.

3. Service Reviews and Continuous Improvement

- Quarterly Service Review Meetings are conducted to assess service performance, SLA compliance, incident trends, and improvement opportunities.
- Action plans from these meetings are tracked to completion and reviewed at the next session to ensure accountability and progress.
- Customer feedback is incorporated into CodM Software's continual-improvement programme, driving enhancements in quality, communication and delivery.

4. Customer Satisfaction and Retention

- Client satisfaction is monitored through periodic feedback requests and post-incident surveys.
- Any concerns or improvement areas are addressed promptly through corrective action and documented follow-up.
- CodM Software focuses on building trusted advisor relationships, helping clients extract greater value from their Salesforce investment over time.

5. Partnership Development

- Beyond operational support, CodM Software works collaboratively with clients to identify new opportunities for innovation, automation and AI adoption within Salesforce.
- Strategic roadmap discussions help align Salesforce evolution with the client's broader digital transformation goals.
- Long-term clients benefit from access to new solution insights, proof-of-concept initiatives and industry-specific guidance.

By combining structured relationship management, clear communication and a culture of continuous improvement, CodM Software Limited ensures each engagement evolves into a sustainable partnership, one built on trust, transparency and shared success.

Termination Process

CodM Software Limited manages termination of services in a structured and transparent manner to ensure minimal disruption, full data handover and clear accountability for both parties. The process and conditions of termination are set out in the Order Form or Call-Off Contract and can be tailored to suit the buyer's operational or contractual needs.

1. Termination Rights

- Either party may terminate the contract by giving written notice in line with G-Cloud 15 framework terms.
- Immediate termination may be exercised by either party if the other commits a material breach of contract and fails to remedy it within the agreed notice period.
- Termination may also occur in accordance with any statutory or framework rights available under the G-Cloud 15 framework terms.

2. Minimum Period and Renewal

- The customer acknowledges that it has purchased the Services for the Minimum Period and any Renewal Term(s), as defined in the Certificate or Order Summary.
- Services are provided for the duration of the agreed call off term and will automatically end on its expiry. Any continuation of services requires a new call off contract and cannot renew automatically.
- Early termination within the Minimum Period may incur a pro-rata charge for committed resources, work already delivered or unrecoverable costs reasonably incurred by CodM Software. Any such charge will not exceed the total contract value for the Minimum Period. For instance, if the total contract value is £500k and £50K represents the unrecoverable costs at the time of termination, the customer may be charged up to that amount capped at the total value of agreed Minimum Period.

3. Obligations on Termination

CodM Software Limited will:

- Provide all necessary cooperation and documentation to support an orderly transition or service migration.
- Ensure all customer data, configurations and documentation are securely handed over or deleted in accordance with the buyer's written instructions and data-protection policy.
- Maintain confidentiality obligations beyond termination.

The Buyer will:

- Settle all outstanding invoices for work completed or services delivered up to the effective termination date.

- Provide reasonable access to systems and personnel during the off-boarding period to facilitate handover.
- Confirm receipt of all transferred data and acknowledge closure of access credentials upon completion.

4. Early Termination Costs

- Where termination occurs before the end of the agreed Minimum Period or Renewal Term, CodM Software may apply early-termination fees reflecting actual costs committed to project delivery, third-party licences or dedicated resource allocations. For instance, if the total contract value is £500k and £50K represents the unrecoverable costs at the time of termination, the customer may be charged up to that amount capped at the total value of agreed Minimum Period.
- No additional penalties apply beyond the recovery of legitimate, documented costs.

5. Post-Termination Support

- Optional transition support can be provided at additional cost on an hourly basis as per the rate card to assist with data migration, system handover or knowledge transfer to a new supplier.
- Any such post-termination work will be scoped and agreed in writing prior to commencement.

CodM Software Limited is committed to ensuring a fair, transparent, and well-managed termination process that protects both parties' interests and ensures full continuity of service up to the termination date.

5. Our experience

Case Studies

Case study – Education Sector

A leading UK university with multiple campuses faced fragmented CRM systems for student recruitment, admissions and case management. Data duplication, inconsistent records and limited visibility across departments hindered collaboration between Admissions, Student Services and International Recruitment. Manual workflows slowed applicant onboarding, while the lack of marketing automation and third-party integrations (UCAS, Enrolly, Universe) restricted engagement and operational efficiency.

CodM Software Limited implemented Salesforce Education Cloud to unify the student lifecycle from enquiry to alumni.

Key activities included:

- Deploying Education Data Architecture (EDA) to standardise data models and create a 360° student view.
- Building Experience Cloud portals for students, applicants and partners, enabling secure self-service and collaboration.
- Integrating Marketing Cloud for automated, personalised communication and onboarding journeys.
- Connecting external systems through MuleSoft APIs for real-time data exchange with UCAS and other platforms.
- Implementing Service Cloud for centralised case management with automated routing and AI-driven insights.
- Establishing Microsoft 365 SSO and GDPR-compliant data-security controls.
- CodM delivered end-to-end services including configuration, Apex and Flow automation, portal components, user training and CI/CD release management.

Outcome:

- 50% faster case resolution through automated routing and escalation.
- Complete 360° student visibility, reducing data errors and duplicate records.
- Streamlined admissions with improved applicant satisfaction and faster onboarding.
- Higher engagement and retention driven by personalised communications.
- Seamless data integration across UCAS, Enrolly and internal systems.
- Future-ready Salesforce platform supporting scalable AI-powered analytics and student-success initiatives.

Case Study - Energy Sector

A leading renewable energy provider operating across the UK and Australia needed to modernise its CRM and order management systems to support sustainable growth. Fragmented platforms for customer accounts, contracts, and meter data created inefficiencies, manual processing, and limited visibility across teams. Order-to-activation timelines were lengthy, reporting lacked transparency, and there was no seamless integration between sales, billing, and compliance systems. The organisation also required better renewable-energy tracking to align with net-zero commitments and regulatory reporting standards.

CodM Software Limited delivered a full Salesforce Energy & Utilities Cloud implementation integrated with Salesforce Order Management and MuleSoft for connected, data-driven operations.

Key activities included:

- Configuring Energy & Utilities Cloud to manage customer hierarchies, contracts, and meter data.
- Automating the order-to-activation lifecycle with workflow approvals and dashboards for real-time tracking.

- Integrating Salesforce with billing, ERP, and energy-data hubs via MuleSoft APIs for live contract and consumption data exchange.
- Deploying CRM Analytics and Einstein AI for predictive churn, usage forecasting, and pricing optimisation.
- Building Experience Cloud portals for customers to view contracts, submit requests, and track sustainability performance.
- CodM managed design, configuration, integration, training, and release through CI/CD pipelines, providing ongoing managed-service support post-launch.

Outcome

- 40% faster order processing and reduced manual effort through automation.
- Unified customer visibility across sales, operations, and service teams.
- Enhanced data transparency improving accuracy and decision-making.
- Real-time sustainability dashboards supporting ESG and renewable-energy reporting.
- Scalable, future-ready Salesforce platform operating consistently across UK and international markets.

Case Study - Nonprofit & Public Health Sector

A UK-based nonprofit supporting young people and vulnerable communities managed its beneficiaries, donors and volunteers through manual spreadsheets and disconnected databases.

The absence of a unified CRM created data duplication, limited transparency and time-consuming reporting. Collaboration with NHS partners was constrained by the lack of secure data integration, while uncertainty around Salesforce licensing prevented adoption of affordable technology under UK nonprofit grant programmes.

CodM Software Limited implemented Salesforce Nonprofit Cloud as the central platform for constituent and programme management.

Key activities included:

- Deploying the Nonprofit Success Pack (NPSP) with customised data models for donors, volunteers, funding and outcomes.
- Migrating and cleansing data from legacy systems with validation, deduplication and governance controls.
- Integrating Salesforce with NHS data systems through secure MuleSoft APIs to automate beneficiary health-record synchronisation and service tracking.
- Establishing GDPR-compliant and NHS-approved security protocols, ensuring full information-governance alignment.
- Building real-time dashboards and Tableau reports for impact measurement, programme reach and fund utilisation.
- CodM managed the full lifecycle, from architecture and configuration to training and post-go-live support.

Outcome

- 100% centralised data management, eliminating manual processes and duplication.
- Automated, accurate impact reporting improving transparency for trustees and funders.
- Secure NHS data integration enabling coordinated care and support delivery.
- Operational efficiency gains, freeing staff time for frontline engagement.
- Sustainable technology adoption through optimised nonprofit licensing.

Case Study - Global Manufacturing

A global packaging manufacturer operating across 40 countries required a scalable Service Cloud environment to enhance customer service, reduce release bottlenecks and improve multi-team collaboration. Manual deployments and fragmented release governance caused version-control conflicts, dependency errors and lengthy release cycles. The client also needed tighter alignment between Salesforce and its enterprise DevOps platform, Azure DevOps to enable faster error-free feature delivery.

CodM Software Limited partnered with Cloud Ohana to deliver a robust Service Cloud and CI/CD transformation programme.

Key activities included:

- Optimising case-management workflows and automating escalation, triage and notification logic.
- Developing custom Apex, Flows and Lightning Web Components to streamline agent experience and SLA management.
- Implementing Gearset CI/CD as the central deployment platform, automating validation, testing and rollback processes.
- Establishing metadata version control, dependency checks and environment synchronisation across Dev, QA, UAT and production.
- Integrating Gearset with Azure DevOps, enabling automated build triggers, approvals and sprint-release documentation.
- Defining a release-governance framework with branching standards, naming conventions and pre-deployment backups to ensure compliance and traceability.
- CodM led configuration, development and automation design, coordinating between global teams to align sprint planning and delivery.

Outcome

- 40% faster release cycles through automated CI/CD and Gearset–Azure integration.
- 60% reduction in deployment errors via pre-validation and rollback automation.
- Improved global collaboration through shared dashboards and transparent change tracking.
- Higher agent productivity with optimised Service Cloud interfaces and performance dashboards.

- Future-ready, governed platform enabling continuous innovation and scalable multi-region delivery.

Clients

1. Coventry University
2. SmartestEnergy
3. PhaseTrust
4. Amcor
5. Ohana Cloud



Contact Details

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Amanpreet Singh is responsible for managing all G-Cloud leads, buyer queries and coordination of service information. Buyers may contact him directly to discuss requirements, obtain detailed documentation or arrange a consultation prior to placing an order.