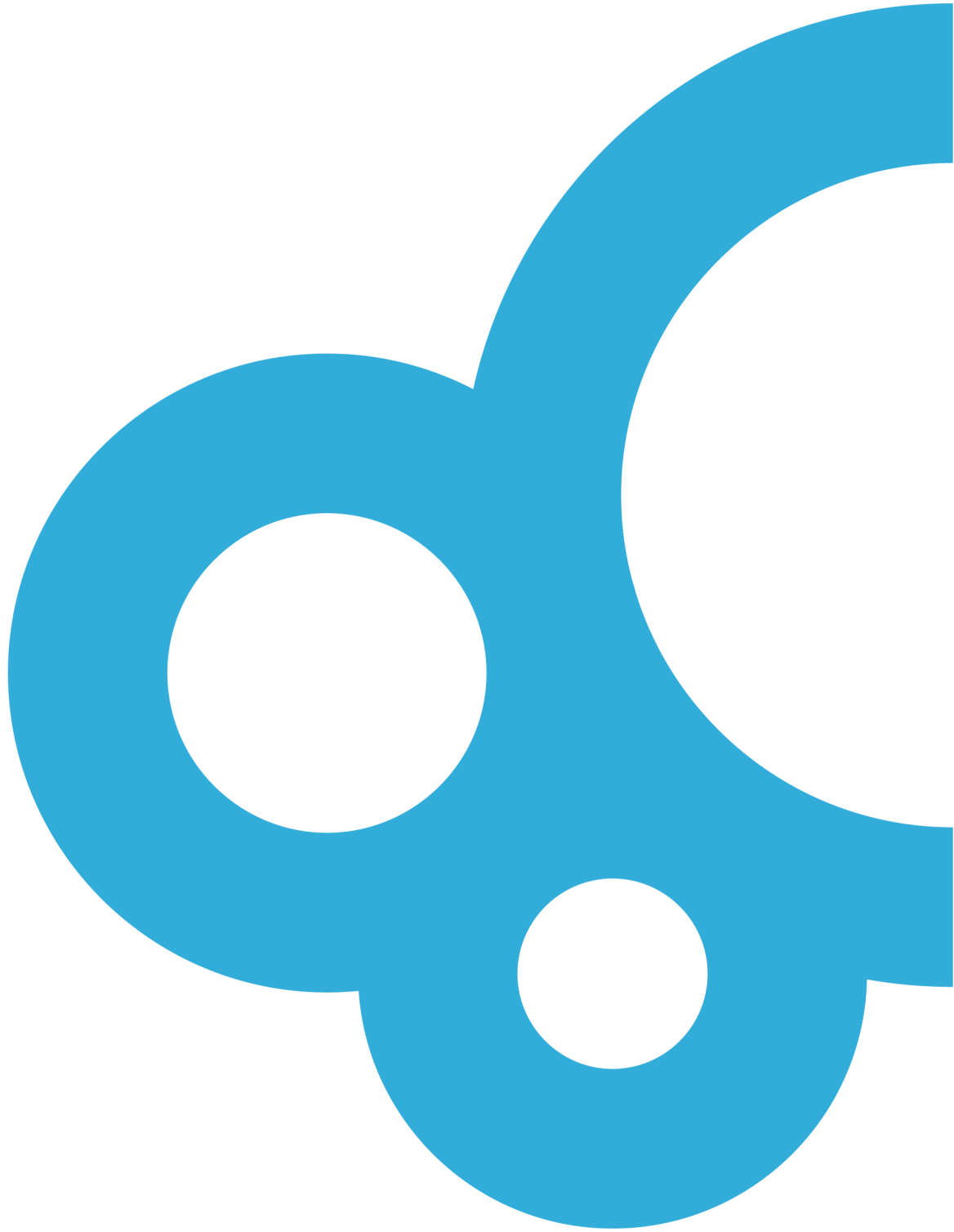




Arcus Local Government CRM

Service Definition

Software



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Service Description

Summary

Arcus is pleased to offer our market-specific Local Government CRM to Councils across the UK. Built on top of the industry leading Salesforce.com Service Cloud CRM product, our solution delivers an accelerated and long term supported path to a CRM model that has been proven and refined with UK Local Authorities.

Extending the market leading out-of-the-box base Salesforce CRM product using our local government app will:

- Reduce the time required to go live within your contact centre by making available standard components for local government related requirements.
- Allow you to leverage our experience from a number of successful large CRM deployments, including at local authorities of all sizes such as Reading BC, Chesterfield BC, Eastleigh BC, St Albans DC and Folkestone & Hythe DC.
- Provide tools to generate a catalogue of council services and link these directly to pre-existing digital forms or back office systems supporting cross skilling.
- Allow the CRM to act as a focus for end-to-end process delivery through integrations including:
 - Arcus Digital Services Hub provides a portal for residents and businesses.
 - Arcus Subscriptions for management of all subscription based services e.g. Garden Waste.
 - Arcus Bookings for booking and managing appointments
 - Full line of business applications built on the Salesforce platform such as Arcus Built Environment, Arcus Corporate Governance and Arcus Regulatory Services
 - Common 3rd party technology providers such as Bartec, Whitespace, Veolia Echo, NEC Revenues & Benefits, Gov.UK Pay, Gov.UK Notify, Companies House, Charity Commission and more.
 - Common local government digital platforms such as GOSS, Netcall, Granicus etc.

The Arcus Local Government solution delivers the data model, process architecture, configurability, customisations, integrations and access to expertise needed for your Council to get the most out of your Service Cloud / Public Sector Solutions investment.

All data is tied to Master Data for People, Organisations and Locations (powered by an on platform Gazetteer Management System, synchronised LLPG integration and/or the LLPG and NLPG extensions from Ordnance Survey).

The layout is clear, concise and user friendly with user experiences tailored to the subject matter in hand and the option to employ the full power of the Salesforce platform in service delivery including Reporting, Dashboards, CTI Integrations, and Agentforce to put the power of AI in your officers hands with the help of the Salesforce Trust layer.

Account business pages draw information from national repositories to deliver a rich and extensible view of the organisations the Council deals with and their trading position.



The accompanying customer portal (Digital Services Hub) has been built on the Salesforce digital experiences platform and includes customised widgets (re-usable in a CRM context by officers) to display the upcoming bin collection days based on the residents home address, the councillors in the residents local and district area and can also display council tax contributions as well as having optional integrations to view and pay council tax using external systems such as Capita.

Features, Advantages and Benefits

The following table lists product features with associated advantages and benefits.

Feature	Advantage	Benefit
Cloud System	Only need an internet connection and a browser to access the system. No need to be on a specific closed network.	Available to council officers anywhere, anytime. Enables collaboration with other services and agencies within the system. System is secure.
Responsive design	Information can be accessed on mobile phone or tablet in the field.	Enables officers access to live data to make decisions, and update data in the field.
Open APIs providing multiple routes for back office integrations	No additional costs for provision of an API.	Council can be confident of integration capabilities and costs from day one. Free API integration capability for back office systems saving time.
Drag and Drop Reporting	Usable without technical skills or knowledge of data structures. Anyone can interrogate the data in real time.	Enables all licensed users to create adhoc reports and dashboards. Realtime tracking of KPIs and individual user reporting.
Provision of mapping tools for plotting, including integration with Local Authority GIS.	Accurately capture details of a reported incident.	Provides officers with an at-a-glance view of where an issue is on a map, including other reported issues.
Highly scalable and resilient architecture	The system is upgraded by Salesforce three times a year, and the Arcus systems are built in a customised but scalable, upgradeable way.	The system does not go out of date, and there is a clear path of upgrade from Salesforce.
Salesforce service cloud console user interface	Easy to use, clean and clear interface. Made to make the day easier without lots of navigation and clicks.	Flexible and cost effective management in a high availability platform.
Support for local government specific catalogue of services	Extensive catalogue of services specific to local gov using long-running experience in issues being	Ability to quickly link cases to services for reporting and logging guidance, target resolution levels and



	faced by residents and businesses.	providing an overview of often used services.
Tailored representations of citizens and business customers	Officers can see immediately in the system, which contact is a resident and which contact is a business, making decisions and levels of support easier to assign.	Tailored views for citizens and business contacts.
Browser User Interface	No installation needed, no server hardware needed.	Reduces cost of ownership for IT.

Arcus SaaS Platform

Arcus Global delivers Software-as-a-Service (SaaS) business applications built on the same technology platform as Salesforce, the world's leading CRM.

All Arcus applications combine core "platform" technologies developed by Salesforce, Arcus on-Salesforce components, and Arcus strategic integrations to 3rd party technologies such as Gov.UK Notify, Ordnance Survey, GIS solutions and PCI compliant payment providers.

Together these technologies deliver all of the components necessary to deliver on a wide range of requirements and thus support the majority of business processes delivered by public sector organisations.

In many cases, including well established examples in local government, applications can operate from within a single "org" - delivering end-to-end integrated processes, opportunities for "master data management" (including "single view", "golden record" etc) and a single security model without the constraints and costs involved in typical cross-application solutions.

Where multi-org solutions are preferred, these can be knitted together with each other and 3rd party systems using Open APIs, Salesforce Data Cloud, or customer's own integration tools with web services support.



Arcus Platform - We refer to the collection of re-usable (and re-used!) technologies and the applications that they deliver as the Arcus Platform.

The Platform delivers a 360-degree view of people, places (linked to full NLP/LLPG/BS7666 addressing where appropriate) and services. This optimises the experience for customers and officers alike, whilst delivering the basis for tactical and strategic insights to drive management decisions.

Better informed decisions with better access to insight into the results means that services are efficient and meet customer needs with appropriate use of rules-based automations. More information on our Digital Platform Solutions can be found here: <https://www.arcusglobal.com/digital-platform>



Artificial Intelligence - Arcus is closely aligned with the Salesforce approach to Artificial Intelligence, seeking to deliver “human in the loop” processes with massively improved productivity around specific and measurable tasks. Our solutions employ the right technology for each context with a focus on business value over academic technical interest.



Professional Services - where standard applications don’t match your processes, Arcus has the depth and breadth of team and expertise to support you in achieving your business goals with Salesforce and/or Arcus Global technologies.

Speak to us to share your ambitions and understand how we can work with you to implement your vision through an agile process, delivering incremental solutions offering tangible results, backed by a range of support and managed service options. <https://www.arcusglobal.com/professional-services/>

Customer Responsibilities

Arcus Global is committed to timely and sustainable customer success.

Most of our customers are undertaking a migration from legacy technologies that have been in use for a decade or more and in many ways have defined current ways of working. It is therefore imperative that implementation projects are supported by the right resources applied in the right quantities at the right time by both Arcus and the customer.

The project must be led by a customer project sponsor / owner that has a clear view of the scope and purpose of the project and can steer the team to deliver that outcome, managing the extent of change that is undertaken at initial implementation and identifying those further ideas that should be revisited following the initial “go live”.

We are happy to discuss the scope, team structure and timetable you wish to work to and prepare a tailored indication as to the resources required. The following customer roles are generally required to deliver a smooth implementation:

Project Sponsor	Senior Manager or group of Managers who provide financial and resources support to the project.
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Responsibilities	• Ensuring the project meets its objectives. • Offering direction, guidance, decision making and support to the project team. • Unblocking issues within the Council to ensure the project delivers benefits and value. • Monitoring the council project team effectiveness. • Monitor milestone progress.
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Senior Users	Senior Manager of the new system to work closely with the implementation team.
Responsibilities	• Prioritises implementation tasks. • Signs off on completed work. • Provides resources to perform UAT. • Answers Technical consultant questions and provides regular feedback. • Ensures End Users are trained. • Inputs into data transfer activities.

Project Manager	To manage the customer project plan and all project activities.
Responsibilities	• Provides regular project updates internally to its own organisation. • Manages customer resources to ensure they are available at the required time for the Arcus project. • Manages payment milestones for the project. • Manages customer deliverables.

System Administrators	To carry out application system configuration tasks during the implementation and system administration and maintenance once in BAU.
Responsibilities	• Manages users and permissions. • Carries out unit testing and UAT. • Configures customer configuration tasks including process flows, pick list values, document templates and ad hoc reports. • 1st line support.

IT/Technical lead	A member of the IT department available to help set up all internal IT required to deliver the project on time.
Responsibilities	• Provides information on APIs, integrations or websites that are required to deliver the project. • Provides access to legacy systems as and when required. • Provides guidance on internal IT processes for Handover to support.

Data lead	Skilled team member to correctly extract and translate data into .csv format.
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Responsibilities	• Attend an initial discovery session with Arcus lead data resource to understand legacy system data. • Perform data cleansing activities. • Extraction of Data. • Mapping of data to Arcus schema.
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GIS Lead	Skilled team member GIS.
Responsibilities	• Provide information relating to corporate GIS. • Carryout configuration following Arcus guidelines. • Create required Cadcorp SWDs. • Assist business areas with mapping to GIS tables.

Gazetteer Custodian	Skilled team member Gazetteer.
Responsibilities	• Provide information relating to the corporate Gazetteer. • Liaise with Arcus on provision of DTF files.

Business Analyst	Enable the council to maximise business effectiveness through data driven decisions. Recommending changes to IT and Business processes, organisation structures and staff development.
Responsibilities	• Gathering definition and analysis of business requirements. • Assisting the project manager with reporting. • Working with internal teams improving business processes. • Assisting with test scripts and UAT.

Technical Architect	Involved in designing and implementing the technical solutions for the project within the council organisation. Typically, this person is involved in larger change programmes.
Responsibilities	• Design the overall architecture of a system or application. • Evaluation of the incoming technology. • Translation of business requirements into technical specifications. • Design and oversee the integration of various system components ensuring data consistency and performance optimisation across different technology platforms.

System Administration Requirements

Customers that purchase Arcus Software are investing in a platform technology that has an unrivalled ability to grow and adapt with the changing needs of their organisation. This is very different to traditional software applications which are generally delivered in fixed “silos” of functionality with limited configuration options.

The combination of Arcus and Salesforce technology offers huge potential, but it is not realistic to expect to be “trained” on or learn all aspects from day one. Instead, the best way to make use of the new capabilities is to build up experience over time - working with users and managers to explore the way in which configuration and customisation potential can deliver business benefits.



To enable customers to work at the pace that works for them Arcus will provide advice, guidance, training, and options for supplementary services.

We expect all customers to accept the following responsibilities from Go Live (and preferably earlier in the project lifecycle to ensure they build confidence and experience):

First point of contact	Customer System Administration resources must ensure that all user queries are assessed and addressed by the customer team before raising a ticket with Arcus Support.
User management	Create, update, and disable users as required. Assign relevant licences, roles, profiles, and permission sets. Reset passwords and deal with other access issues.
Queues & Public Groups	Add and remove members from queues and groups.
Holidays	Maintain a register of bank holidays for at least 12 months into the future.
Monitoring File & Data Storage allowances	Monitor rate of usage of Data Storage and File Storage to forecast when it might expire. Take action to remain within limits - either deleting unnecessary records or purchasing additional storage via your Arcus Global account manager.
Data & Backup administration	Salesforce maintains a copy of customer data for disaster recovery purposes, but customers are expected to operate their own data backup and recovery processes to manage data corruption risks (e.g. user error). https://help.salesforce.com/articleView?id=000334121&language=en_US&type=1&mode=1 https://help.salesforce.com/articleView?id=home_delete.htm&type=5
Data Quality	Put in place and maintain plans to preserve data quality. Identify and correct data quality issues when they arise.
Email and document templates	Update and add Templates, making them available for use through Communication Panel Context and/or other administration tools.
Change management and regression testing	Agree and operate a change management interface with internal "ICT" teams. Maintain a register of key business processes and test processes still operate as expected with local configuration/customisation in a sandbox environment when updates are applied.

We have deliberately excluded all tasks that are related to "business change". It is strongly encouraged that this work is undertaken in-house as a route to getting to know more about the technology, but it can be purchased as a managed service from Arcus in the event of extreme resource pressures.



Salesforce's advice on system administration resourcing can be found at <https://help.salesforce.com/articleView?id=000327119&type=1&mode=1>

Delivering this minimum level of administration work should not be viewed as a sensible "goal" as it will leave significant business benefits unrealised. Arcus offers advice and guidance to all customers on how to get the most out of their investment, and a "Managed Service, Customer Success and Support" offering to complement internal staff as skills are developed and/or to address specific recruitment or operational challenges.

System Requirements

Arcus solutions run on the Salesforce platform. It can be accessed from any computer with an internet connection (unless restricted through security settings). It is assumed that port 80 and 443 are open for all users and that any web filtering software and firewalls will allow free access to the URLs used by the service.

We support the latest versions of the following browsers:

- Mozilla Firefox
- Google Chrome
- Apple Safari
- Microsoft Edge

Further information around supported browsers can be found at:

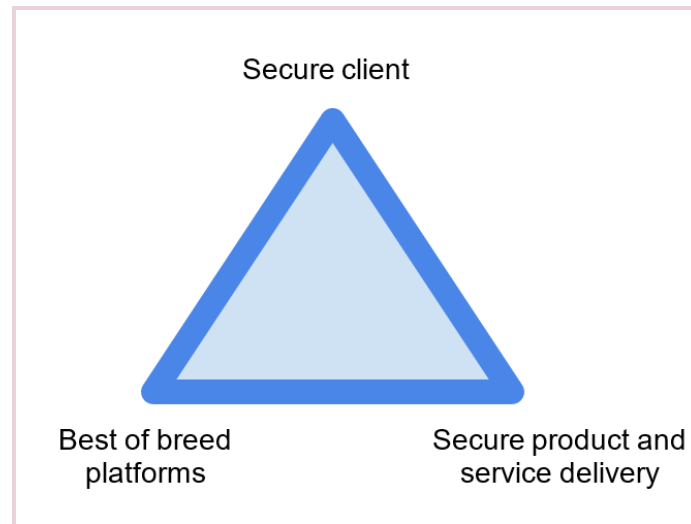
https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5

Your responsibilities are for Internet connectivity, Bandwidth, and utilisation on the customer corporate network. We recommend that at least 128kbps are available per concurrent user of the system.

Arcus Global approach to information security

Arcus Global is committed to improving the impact of technology on its customers and the communities they serve. We do so by adopting, adapting, and extending best-of-breed cloud technologies to deliver solutions that work for the unique circumstances of each of our customers in a sustainable and cost-effective way.

It is clear that the security of information systems is crucial to their success. Arcus Global takes a three-pronged approach to delivering security:



Best of breed platforms

Our team has selected two primary technology partners - Salesforce and Amazon Web Services. These leading cloud computing service providers deliver market-leading functional capabilities and share our belief that security is crucial to maintaining the confidence of our customers.

The technologies are highly certified across a broad range of internationally recognised standards, maintaining microsites dedicated to communicating this information:

[Salesforce Compliance: Certifications - https://compliance.salesforce.com/en](https://compliance.salesforce.com/en)

[AWS Compliance Programs - https://aws.amazon.com/compliance/programs/](https://aws.amazon.com/compliance/programs/)

Secure product and service delivery

Arcus Global is committed to ensuring that the products and services it delivers to extend the offerings of our platform partners do not compromise the market-leading security arrangements they offer.

All Arcus Global operations are all covered by our Business Management System. This is certified to ISO27001:2022 (information security), ISO9001:2015 (quality) and ISO 14001:2015 (environmental management).

We complete Salesforce security reviews for all of our standard Salesforce applications as a matter of course - reviewed packages include Arcus Shared Gov, Arcus Gazetteer, Arcus Built Environment, Arcus Regulatory Services, Arcus Land Charges, Arcus Corporate Governance, Arcus Development Monitoring, Arcus Community Base and Arcus PDF Edit.

Wherever possible the core building blocks are re-used for clients for whom we are delivering custom development.

Members of our project delivery and managed service/support teams can be vetted (if not already completed for other customers) to client standards e.g. SC clearance.



Operating a fully cloud-based business, our office networks and devices/client machines are straightforward, but still certified to the Cyber Security Essentials Plus standard.

Secure client environments

Like all component technologies the security of the end solutions into which they are assembled is dependent upon the way in which they are customised, configured, and maintained.

Arcus Global delivery methodologies ensure that security arrangements are considered throughout the project lifecycle and implemented in line with customer requirements and risk posture. This includes support for penetration tests and other 3rd party security assessments.

Further guidance is provided on topical information security issues (such as GDPR) to assist customers to make use of Arcus (partner) technology in a way that complies with all applicable regulations whilst continuing to deliver business value.

Our team responds rapidly to any information security related intelligence from Salesforce, our customers or the wider guidance including completing pro-active customer audits to ensure that security integrity has been maintained in higher risk configurations such as publishing open data.

NCSC guidance

Arcus regularly reviews and evaluates the security of its arrangements in light of National Cyber Security Centre guidelines including the 14 Cloud Security Principles with which our cloud services are fully aligned.

Further details on alignment with NCSC standards and other information security considerations is available upon request - NDA may be required.

About Arcus Global

Arcus Global is a market-leading GovTech Software as a Service (SaaS) company, delivering mission-critical technology solutions that enable public sector organisations to transform their service delivery. Arcus was formed in 2009 and is based in Cambridge UK.

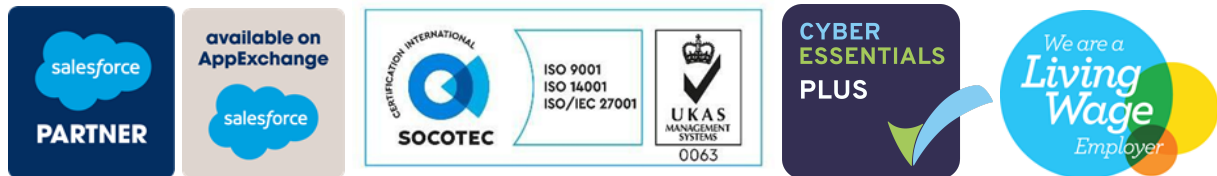
Arcus has developed a platform-based suite of Applications for Local and Central Government. Addressing the challenges in citizen digital interaction and citizen relationship management through specific platform-based case management solutions for an ever-increasing number of services - Planning, Building Control, Licensing and Environmental Health, Housing regulation, Anti-Social Behaviour etc.

Arcus has grown to over 60 public sector customers including Manchester City Council, London Borough of Haringey, Wiltshire Council, Westminster City Council, Chesterfield Borough Council, Eastleigh Borough Council, Ashford Borough Council, Wrexham County



Borough Council, the Home Office, the Greater London Authority, and the Department for Culture Media & Sport.

Arcus Global supports customers so they can realise true efficiencies and meet the digital expectations of citizens through SaaS applications, secure hosting environments, and cost optimisation services.



Arcus Social Value

At Arcus we want to have a meaningful impact as an organisation and to be able to actively demonstrate that in our actions.

Despite being an SME without the large-scale resources of a major corporation, we endeavour to be philanthropic where possible and to work to make the world a better place for all our stakeholders. This includes our customers, employees, investors, partners, and the communities in which we all work and live.

Arcus Are Part Of Pledge 1%



Pledge 1% is a global movement that inspires, educates, and empowers every entrepreneur, company, and employee to be a force for good.

Arcus is an active Pledge 1% organisation:

<https://pledge1percent.org/pledged/>, which means our business has committed to add value by donating 1% of our time and/or money to good causes/environmental improvement.

<https://www.arcusglobal.com/news/arcus-global-joins-the-pledge-1-movement/>

Volunteer Days

Working to make the public sector better feels good, so in addition we encourage all of our team to take two charity days per year on top of their annual leave to donate their time to worthwhile causes. This is often in another local authority area to which our office is located, as our team is largely remote and distributed throughout the country.

ISO14001 Certification:

Identifying our environmental impact and achieving ISO 14001 certification goes hand in



hand with Arcus' environmentally friendly ethos and means that we're able to make our day-to-day operations more sustainable.

When in the office, we reside in a building that has a BREEAM rating of EXCELLENT - the **Building Research Establishment Environmental Assessment Method** (BREEAM) is the world's foremost environmental assessment method and rating system for buildings and sets the standard for best practice in sustainable building design, construction, and operation.

Amongst other things, the building uses rainwater harvesting tanks to collect and store water for use as 'grey water' for toilet flushing, etc. Has Solar PhotoVoltaic panels on the roof and building's front elevation, saving almost 13 tonnes of CO2 per year. We also closely monitor our energy consumption and have low-energy, high-efficiency lighting throughout the building, and PIR movement detector control.

When it comes to business travel, we encourage our team to try and select the most environmentally sustainable mode of transportation, that is if a virtual meeting is not a suitable option. We also operate a Government cycle scheme to help with the cost of purchasing a bike for commuting, or general lifestyle. Cycling is a great way to build fitness into a daily routine and it's good for the planet too, so it's win : win!

What Our Customers Say

Arcus pride ourselves on working closely and collaboratively with our customers, evidence of which is provided below:



"Arcus have supported us in implementing their Regulatory Services system, and in a short period of time, we have been able to design a solution that will further enhance our commitment to excellent victim and witness care throughout our investigations. By making use of the Digital Services Hub, we've also made it easier and quicker for our customers to register with us. Working with the customer-focused and friendly team at Arcus has made the process far smoother than it might otherwise have been."

Steve Toppin, Service Manager, Gloucestershire Trading Standards



"I am delighted that Durham County Council's Community Protection Service has now successfully migrated its business compliance case management functions onto the Arcus Regulatory Services platform. This marks the end of an extensive and rigorous market exploration, testing and competitive procurement exercise.

We have collaboratively worked with Arcus throughout the implementation stages of the project and whilst any major



change is challenging for the respective project teams the implementation went relatively smoothly. Early feedback from the wider service staff who are now using the software has been very positive about the product's functionality, usability and appearance. If the early signs are anything to go by, I can only see the benefits of the Service utilising Arcus to its full capabilities enhancing further the great work that Community Protection delivers across County Durham.

Thanks to all those involved in the project and I hope it's the beginning of a great working partnership."

Gary Carr, Durham County Council Strategic Regulation Manager



"The introduction of the Arcus Regulatory Service has significantly improved the efficiency of our street-based officers. The mobile application provides real-time updates to the back office, enabling officers to carry out their duties swiftly and effectively within the community. This has led to a notable increase in customer satisfaction.

The intuitive web-based system, accessible from anywhere, has improved our performance during inspections and visits across the city.

The solution enhances reporting and intelligence, offering a clearer view of the City and enabling proactive measures to be implemented.

A sincere thank you goes out to Danny Ivie, Denise Farrelly and Anna Gerrard and the team for their tireless efforts, innovative application of Arcus solutions, and unwavering collaboration throughout this process. Your hard work and perseverance have been instrumental in bringing this vision to life.

Thank you for your patience and support as we've worked to implement these improvements. We look forward to the positive impact these services will bring and are excited to continue serving you in new and improved ways."

The Westminster City Council Safe City team



"We wanted an experienced partner like Arcus Global to lead the implementation for us. Arcus' expertise has been invaluable, and the project has been very timely, especially given the need for flexibility and remote working in the current climate. As the product is cloud based it's given us a robust and easy system that allows our officers to work anytime, anywhere, enabling us to carry on delivering better outcomes for London citizens and visitors."

Peter Kemp, Head of Change Delivery & Planning, Greater London Authority



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