

Individual Level Data - demographic propensity models (Ocean) and financial lifestage segmentation (Fresco) and API

Lot 2 - Software as a Service

CACI

data + technology

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1. Description of Service

UNDERSTANDING INDIVIDUALS

Understanding individuals within a household is a fundamental requirement for all public sector organisations to support the delivery and personalisation of services more effectively. CACI has built a range of tools to enable quick access to individual level insights.

This data is available via API, various Data Cloud market-place platforms and appended to records via AWS S3 Buckets



Ocean is a database of the UK population containing over 700 attributes covering demographic, digital, lifestyle and attitudinal characteristics. By combining data from the Edited Electoral Roll, research surveys, open data, government data and many other sources, we've created a picture of the UK population that you can apply to your own databases or within InSite Everywhere.



Fresco is CACI's financial services segmentation and has been built using the richness of GFK's Financial Research Survey data combined with CACI's extensive data sets on the UK population covering demographics and lifestyles.

It categorises individuals into 12 segments, 45 sub segments and 134 micro segments - It brings all of these dimensions together into a single segment code at individual level, which can be applied to your customers and to the market as a whole.

Fresco is coded at full individual level, as individuals within households may have different channel and attitudinal drivers. For example, many younger working families consistently heavily shop around for their car insurance needs on an annual basis to get the best value quote. They have very different channel requirements compared to other segments. However, this will vary within their sub-segments due to specific attitudinal traits.

2. Features and Benefits

Features include:

- Ocean and Fresco available at individual level
- Support material such as Technical Guides, User Guides and Knowledge Sheets included
- Profiling, coding and mapping capabilities
- Access via secure data transfer portal, API or Insite Everywhere
- Can be aggregated up to postcode, household or other census geography levels
- Activation sessions and training support included
- Experienced Account Manager plus access to expert technical support (and helpdesk if accessed via InSite Everywhere)
- Fresco-Live Chatbot solution available separately to enable effective socialisation of the segments across non-data teams.

Benefits include:

- Access to up-to-date insight describing evolving communities which can be used to evidence decision-making
- Consistent view of demographic, lifestyle and behavioural characteristics of residents within households
- Propensity models to feed into internal decisioning models such as channel preference, digital sophistication and financial requirements
- Input into bespoke segmentations
- Prioritise budgets, resources and delivery of services to the right people while at the same time achieve efficiency savings
- Comprehensive digital insight providing an understanding of online access, behaviour and activity. Ideal when developing online and offline services
- Support effective communications and engagement reflecting channel, contact and marketing preferences
- Infill key missing database information
- Publicly publishing and sharing permissions included.

3. Key Functions



Ocean: database of over 700 variables describing the UK population

Typical use cases for Ocean include:

- Insight and understanding of consumers at an individual level
- Input to help improve the accuracy of propensity models for segmentation, cross sell and retention
- Ability to create detailed pen portraits of customer segments
- Acquisition/targeting models
- Improve proposition development
- Infill key missing database information
- Personalisation of campaigns
- Niche audience selection
- Prioritisation of services



Fresco: CACI's individual level financial services segmentation

Typical use cases for Fresco include:

- Gain insight into consumers at an individual level through a manageable segment view
- Segment customer databases by combining Fresco with known consumer information
- Enable market sizing
- Tailor product /service offerings with appropriate messaging
- Understand consumer channel preference
- Easy selection for cross-sell of services or products
- Segment local services
- Bridge to other not for profit segmentations, such as Fair4All Finance and Cash Access Group (available to members only)
- Target online digital display or social media awareness

4. Onboarding and Offboarding

WE MAKE THE ONBOARDING PROCESS AS SIMPLE AS POSSIBLE

ONBOARDING

- CACI's commercial team are very happy to chat through your requirements and use cases and provide recommendations to support you in deciding the number of variables or tool most relevant
- Following a decision, you simply place an order by completing a call-off contract and issuing a purchase order. We recommend allowing two weeks from contract signing to receiving the data in house and our team will be in touch to discuss the best method to receive the data
- For brand new clients, we recommend an implementation session where CACI's technical team support you by walking through how to use the data within your systems
- CACI provides Account Management support as standard to support you throughout your duration with us.

OFFBOARDING

- Should a customer choose not to renew their licence, it is a requirement they serve notice (in writing or via email) 30 days before the end of the agreement. As the end of the agreement approaches CACI will issue a termination letter for the customer to sign and return formalising the end of the agreement.
- At the end of the contract users are contractually required to remove and delete all data with the exception of aggregated data that may have been included as part of published reports and / or maps in line with CACI's publishing and sharing terms and conditions.
- CACI will issue a Termination Letter at the end of the licence term for the customer to sign and return legally and formally terminating the agreement and confirming compliance with the contract terms and conditions.
- As part of ISO 27001 our processes we use certified industry leading suppliers to process the destruction of data.
- Disks are crushed by CACI before disposal through third-party shredding. We use CESG Approved Shredding.

5. Implementation Plan

GETTING STARTED WITH CACI DATA & SUPPORT

PLAN OVERVIEW

Licensing data with CACI couldn't be easier, we've made a range of cloud-based solutions available to ensure easy appending of CACI data to your consumers, all you need is a name and address. .

- **Set-Up:** Once you've placed an order, CACI's team will be in touch to ensure we're providing you the data in the best possible way. Where API is chosen, we have a dedicated email address to help with technical issues
- **Implementation :** CACI's technical team will walk you through the data and how to use it within your applications. We'll also provide you all the supporting collateral to ensure you can hit the ground running.
- Follow-on support (0.5 days per annum) is available for the life of the licence term and can be used to onboard and train new users throughout the licence term.
- **Support:** An Account Director or Account Manager will be responsible for (i) Day-to-day help and support over the telephone or email and (ii) Available for online account management meetings or conference calls and in person, if required.
- Your Account Director or Account Manager will act as your point of contact should you require technical support, the level of support provided will be determined by the nature of the enquiry i.e. if the enquiry relates to data **sources** and product build of licenced CACI datasets these typically can be answered over the phone, where the enquiry is more complex (e.g API support) this may involve contact with CACI's API help desk or other Technical Experts via email, phone or screen sharing functionality.

6. Technical Requirements

TECHNICAL REQUIREMENTS VARY BASED ON YOUR CHOICE OF INGESTION

All data is hosted in the UK - we will never host or process data outside of the UK.

API

- Skills in reliable and fault tolerant RESTful API integrations
- Requirements to perform real time or near time enrichment of customer records as opposed to batch
- Ability to identify unprocessed customer records to ensure that allocated quota is used effectively

Bulk Coder

- Skills in building reliable and fault tolerant flat file interface integrations that utilise AWS S3 or sFTP
- Requirement to perform batch processing as opposed to real time or near real time
- Ability to identify unprocessed customer records to ensure that allocated quota is used effectively

CACI processing on AWS

- Ability to access secure HTML file transfer site
- Tools to export consumer data including at minimum name and address

7. Ordering and Invoicing

WE AIM TO MAKE THE ORDERING AND INVOICE PROCESS AS SIMPLE AS POSSIBLE.

ORDERING

- We will consult with you regarding the exact configuration of the data transfer and follow this with a quotation.
- Following a decision, you can simply place an order.
- We will accept a direct purchase order.
- Upon receipt of signed contract and purchase order we will schedule the build of your system which will take approximately two weeks.

INVOICING

- Following receipt of the signed contract for Fresco or Ocean we will invoice you for the first year of the initial term and then annually from this anniversary date.

8. After Sales Support

USERS BENEFIT FROM OUR TEAMS LISTENING FOR FEEDBACK AND OFFERING SUPPORT

CUSTOMER ENGAGEMENT

- Throughout the life of the contract we will make regular Account Management calls to users to see how they've been getting on with Fresco or Ocean and the associated deliverables.
- In addition to this, we strongly encourage users to engage with us if they have queries relating to data use, publishing and sharing of outputs and to provide feedback.
- It is this level of engagement that allows us to build close relationships and enable customers to shape our future product and service developments.

ACCOUNT MANAGEMENT

- When you license CACI datasets you will have your own Account Director and/or Account Manager who will be responsible for;
 - Day-to-day help and support over the telephone or email
 - Available for online account management meetings or conference calls and in person, if required.
- For example, users can channel questions relating to product build and methodology as well as query the licenced CACI datasets. If the query is complex CACI's Technical Experts will be available to liaise with users directly as outlined in the implementation plan section.

9. Service Levels

OUR SKILLED INTEGRATED TEAM AIM TO BE EXTREMELY RESPONSIVE.

AVAILABILITY

- CACI's Account Team endeavour to respond to basic queries and requests within one working day (between the hours 09:00 - 17:00), response times to more complex queries and requests will depend on the nature of the enquiry. CACI is closed at weekends and on public holidays.
- Expert Technical Support includes access to those responsible for the development of licenced CACI datasets and transfer method. Your Account Director and/or Account Manager will be your point of contact if you require technical support, the level of which will be determined by the nature of the enquiry. If the enquiry relates to data sources and product build of licenced CACI datasets these typically can be answered over the phone, where the enquiry is more complex this may involve contact with CACI's other Technical Experts via email, phone or screen sharing functionality.

OUR TEAM

- Our staff are highly skilled with extensive, specialist knowledge and expertise of the Public Sector, built over many years.

10. Business Continuity and Disaster Recovery

WE OFFER 99% HOSTED SERVICE AVAILABILITY

RESILIENCE

- Availability for the last 12 months has been over 99.9%. Where customers require a Service Level Agreement (SLA) and respective Key Performance Indicators (KPIs), these are discussed and agreed at contract signature to align service availability and performance to the customer's needs.
- Anticipated downtime for upgrades is agreed in advance with customers to avoid any impact during busy periods. This proactive approach enables communications to be sent to the user base prior to the release of upgrades or patches.
- All systems are installed on highly reliable hardware in CACI owned UK data centres, backed up nightly on offsite encrypted media, patched regularly, while being protected by high-end firewall systems, intrusion detection and antivirus systems. Complete network penetration tests are performed annually by independent third parties.
- An email alert would be sent to the user(s) in the event of service outage

DISASTER RECOVERY

- Should a system failure or natural disaster create a business disruption, CACI have appropriate measures in place to minimise the impact and to restore services.
- Our Business Continuity Policy outlines our approach to BC/DR and Business Continuity and a Disaster Recovery Framework document outlines the BC /DR process and high-level restoration plans for each office.
- Our IT infrastructure is located across several sites where many essential services are replicated. Servers can be restored/relocated to sister sites, if required in the event of a disaster.
- Encrypted backups are taken daily and stored offsite with a specialist contractor and can be delivered on demand to alternative offices if required.
- A dedicated Business continuity committee is in place to react quickly to any on-going situation, make decisions on criticality and react accordingly.
- Regular tests and reviews of our Business Continuity arrangements are performed to identify improvements to processes and procedures.

11. Pricing Overview

Please see separate pricing document.

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Thank you

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