

SALESFORCE HEALTHCHECK

Service Definition
G-Cloud 15

REPLY

38 Grosvenor Gardens - London SW1W 0EB - United Kingdom - tel +44 (0) 207 730 6000 - fax +44 (0) 207 259 8600
info@reply.com

www.reply.com



TABLE of CONTENTS

SERVICE DEFINITION	1
TABLE OF CONTENTS	2
SERVICE DESCRIPTION	3
WHAT IS OUR SALESFORCE HEALTH CHECK?	3
WHO IS IT IDEAL FOR?	4
WHO MIGHT YOU BE WORKING WITH?	4
ONBOARDING	5
OFFBOARDING	5
ACCESS TO DATA	5
SECURITY	6
PERSONNEL SECURITY	6
INFORMATION SECURITY	6
PHYSICAL SECURITY	6
TRAINING & KNOWLEDGE TRANSFER	7
ORDERING AND INVOICING PROCESS	8
CUSTOMER RESPONSIBILITIES	9
ABOUT REPLY	10



SERVICE DESCRIPTION

Reply are a pure-play Salesforce Summit Consultancy partner solely based in the UK. We focus on enabling our customers, not embedding technology that makes them dependant on partners. We understand in the public sector, customer engagement and operational efficiencies are paramount. Our Salesforce implementation services offer a comprehensive suite of solutions tailored to government agencies and public bodies. These encompass the strategic planning, customised implementation, and ongoing support of Salesforce platforms.

Arlanis will supply a wide range of Salesforce offerings, supporting from business analysis and requirements capture, through to early life support and managed services. Our implementation services are fitted for all customers, from just starting their Salesforce journey, to large enterprises who require whole business transformations. From improving citizen services, to enabling interdepartmental collaboration, our services aim to transform public sector entities into more agile, transparent, and responsive organisations.

Features	Benefits
- Free health check of existing Salesforce orgs. - Written Summary Report of Health check findings. - Creation of proposal to address health check findings. - SC Cleared staff and onshore talent. - Recommend how to extend/amend current Salesforce implementation. - Correction/simplification of automations. - Analysis of code-based customisations. - Reporting & Dashboard utilisation/best practices. - Tips on increasing user adoption and training.	- Free of charge health check. - Identify deficiencies in your Salesforce org. - Align with Salesforce best practices. - Speed up your Salesforce org. - Identify areas of the solution that aren't being utilised well. - Maximise CRM implementation and utilisation. - On-site and remote working - full UK based company. - London based offices for in person collaborations. 15+ years of CRM experience.

Reply are specialist in the majority of Salesforce Products, including Sales Cloud, Service Cloud, Marketing Cloud, MuleSoft, Commerce, Industry Cloud, Data Cloud, Heroku, Experience Cloud, Slack etc.

What is our Salesforce Health check?

Work with our dedicated Salesforce team, we will deep dive into your existing Salesforce configurations and customisations. You can expect some of the following during the health check process:

- Discovery meetings with key stakeholders to better understand how Salesforce is currently being utilised.
- Run native Salesforce health check report to give better overall security health of existing Salesforce orgs.
- Our team of developers will assess the current customisations of Salesforce, investigating Apex Classes and Apex Triggers, as well as integrations, comparing with best practice use, code coverage and Salesforce governor limits.
- Our Consultants & Administrators will assess the cleanliness of the existing Salesforce org, looking into current processes, Salesforce best practices, out of the box functionality, user permissions, record



& data cleanliness and utilisation.

- Reports will be run to see where areas of the system are not being utilised well, this can identify areas that are not being used properly, are overly configured, or not needed.

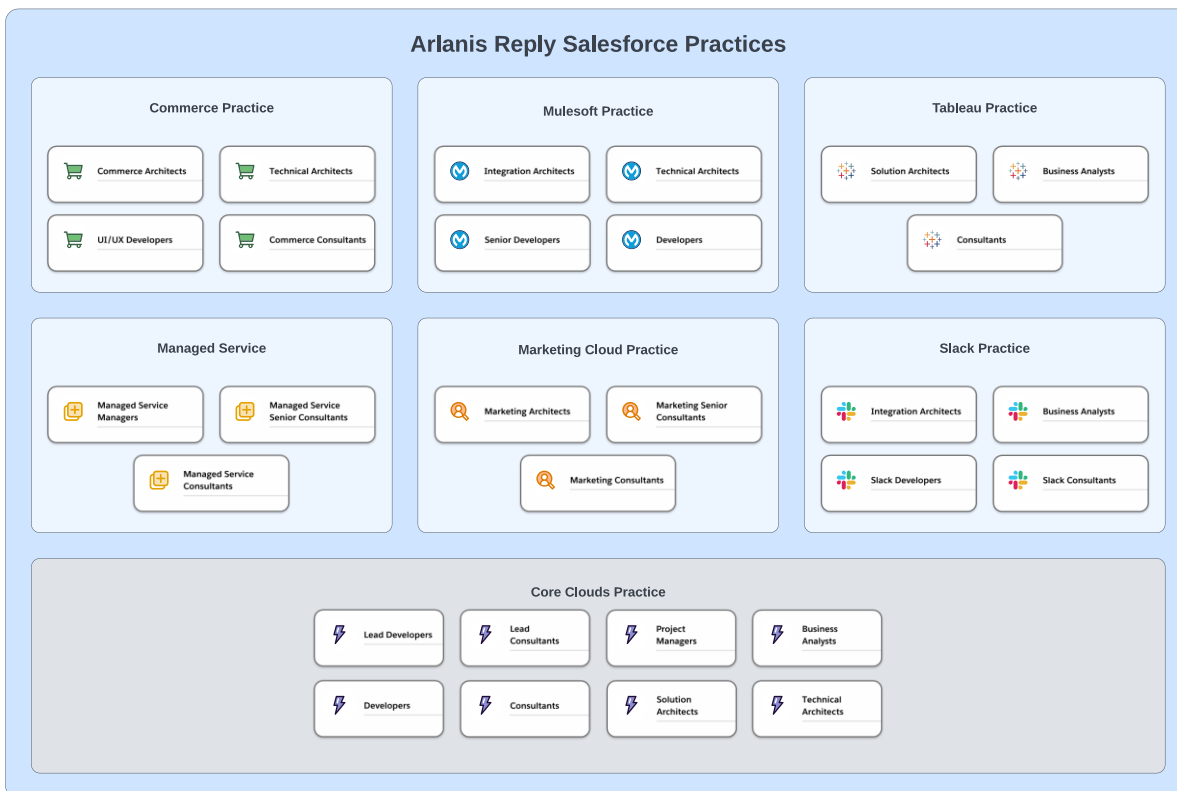
At the end of the process our team will present back all of the findings, as well as a proposal to implement improvements to the Salesforce org, which will include costings and timelines.

Who is it Ideal for?

Our Salesforce Health Check is ideal for existing Salesforce customers, who want to better understand how they are using their Salesforce org, how it compares to other companies, and how they can improve their usage. We see a lot of reasons why companies might not be sticking to Salesforce best practices, and why it's important. Maybe you self-implemented, maybe it was over complicated, or implemented a long time ago.

We think it's very important that companies have a strong foundation that they are implementing off of, sticking to Salesforces best practices and intended use of the system. Over complicating and customising where not needed can hinder how scalable the solution is, and worse of all – takes you off of Salesforces upgrade path. Each year Salesforce pushes 3 updates to all Salesforce orgs free of charge – if you have a highly customised org, sometimes you won't be able to use these features as you won't be using out of the box functionality.

Who might you be working with?





ONBOARDING

Onboarding to our Salesforce Health Check service is designed to be a seamless and collaborative journey. We recognise the intricacies of public sector operations and tailor our onboarding to meet the stringent demands of public service delivery. Some onboarding processes can include:

- **Define Objectives:** Clearly define the project objectives in alignment with public sector mandates and your strategic goals.
- **Establish Governance:** Set up a project governance structure to ensure oversight and successful delivery in line with the GDS framework.
- **Secure Data Handling:** Establish protocols for secure data handling, adhering to the UK GDPR and public sector standards.
- **Establish team:** Onboard group of certified and industry specialists who will conduct the Salesforce Health Check
- **Identifying Champions:** Working with you to identify internal champions who will drive the Salesforce project within your organisation.
- **Communicating Expectations:** Clearly outlining roles, responsibilities, and expectations to all project stakeholders.

Our onboarding process is designed to ensure that your transition to Salesforce is well-planned, secure, and sets a solid foundation for a successful implementation. We partner closely with your team to not only onboard the technology but also to foster a culture ready to embrace digital transformation.

Offboarding

The offboarding process from our Salesforce services is approached with as much diligence and attention to detail as our onboarding. We ensure a structured and transparent transition, whether moving to another phase of the project, handing over to an in-house team, or transitioning to another supplier. Post health check, we understand that some customers will choose lots of different paths to continue down, and we want to make that process of moving on from Arlanis Reply as seamless as possible. Some processes you can expect from our offboarding:

- **Transition Workshops:** Conduct workshops with all relevant stakeholders to discuss the scope and timeline of the offboarding process.
- **Documentation Review:** Ensure that all documentation is up-to-date, comprehensive, and easily understandable for the succeeding team or supplier.
- **Offboarding to another supplier:** Perform an audit that all contractual and service obligations have been fulfilled, and a closure meeting with all stakeholders to confirm completion of offboarding process and formally close project.

Our offboarding process is designed to be comprehensive, secure, and considerate of future public sector needs. It ensures that there is no loss of service quality or data integrity, and that your team or the succeeding supplier is fully equipped to take over with confidence.

Access to Data

Ensuring uninterrupted access to client data upon exit is a critical component of our offboarding process. We adhere to strict protocols to guarantee that your organisation maintains full control and accessibility to all its data, aligning with public sector standards and data protection laws.



SECURITY

Personnel Security

As a Specialist Cloud Service, the capability being offered is not limited to specific Impact levels (as it is not infrastructure, software or a platform) and can be used, subject to personal Security Clearance levels. Reply consultants are mostly Security Cleared (SC), some have higher-level Developed Vetting (DV) clearances. We also have a pool of NPPV3 Consultants for Policing work. The majority of our work for both public and private sector clients is at IL2 but we work in the Official, Secret and Top-Secret domains. Our hard and soft information security processes have been designed and approved by independent CESG CLAS accredited consultants.

Information Security

We are ISO27001, Cyber Essentials certified and our Quality Assurance processes are based upon and compliant with our ISO 9001 accreditation. Our Information Security processes are directly guided by our ISO27001 accreditation. We shall adhere to local information and other security policies and will apply local Security Operating Procedures (SyOPs) as may exist. If such do not exist we shall apply our own SyOPs.

Physical Security

The Main Reply Office (London, UK) is a Police Accredited Secure Facility (PASF) with access controls for each point of entry. All Laptops/Phones must be stored securely overnight. When working on a client-site our consultants adhere to client security policies.



TRAINING & KNOWLEDGE TRANSFER

Our approach to training and knowledge transfer is built on the foundation of empowering public sector organisations to maximise their investment in Salesforce. As a summit Salesforce partner with a commitment to delivering exceptional public sector solutions, we offer a comprehensive training programme designed to cater to all levels within your organisation.

Customised Training Programmes: Understanding that different roles within your organisation require different levels of Salesforce knowledge, we offer customised training programmes:

- **Administrator and Developer Training:** Comprehensive training for Salesforce administrators and developers, covering system configuration, custom development, best practices, and security to ensure your team can fully support and extend the Salesforce platform.
- **End-User Training:** Role-specific training designed to ensure that all users can efficiently utilise Salesforce in their daily tasks, enhancing productivity and service delivery to the public.

Methodology: Our training methodology is inclusive, engaging, and designed for maximum knowledge retention:

- **Blended Learning Approach:** Combining instructor-led training, hands-on workshops, e-learning modules, and interactive webinars to cater to different learning styles and schedules.
- **Train-the-Trainer Model:** Equipping selected staff members with the knowledge and tools to train other users, ensuring sustainable Salesforce expertise within your organisation.

Knowledge Transfer: Our knowledge transfer process ensures your team has the information and confidence needed to manage and optimise Salesforce long after our formal engagement concludes:

- **Documentation and Resources:** Providing comprehensive documentation, including user manuals, configuration guides, and best practices, all tailored to your specific Salesforce environment.
- **System Handover Workshops:** Conducting detailed sessions to transfer knowledge about the customised Salesforce solution, including the architecture, custom code, integrations, and operational procedures.
- **Q&A Sessions:** Regularly scheduled Q&A sessions during and post-training to address any lingering questions and ensure clarity and confidence in using the system.

Our training and knowledge transfer services are designed to empower your organisation with the skills and knowledge to leverage Salesforce to its full potential. We aim to foster a culture of continuous learning and improvement, ensuring that your investment in Salesforce continues to deliver value long into the future.



ORDERING AND INVOICING PROCESS

To begin the process, please contact glue.frameworks@reply.com with details of your organisation, role and high-level requirements.

Our Framework Manager will connect you to our experts and from here we will organise an introductory discussion to go into more detail and shape a proposed engagement that suits your needs.

We invoice for both fixed price and time and materials engagements one month in arrears. For fixed price engagements, this takes place upon completion of the deliverable(s), or in stages, if the size of the engagement is greater than £40,000 excluding VAT.

Payment terms are 30 days net of receipt of invoice.



CUSTOMER RESPONSIBILITIES

For the successful implementation of Salesforce solutions within the public sector, a collaborative partnership between our team and the client is essential. Some client responsibilities can include:

- **Clear Communication:** Maintaining open and consistent communication channels with our project team.
- **Dedicated Team Members:** Allocating dedicated internal team members who will work closely with our project team.
- **Time Commitment:** Ensuring that all required participants from your organisation can dedicate the necessary time, depending on the activities required for their role.
- **Data Preparation:** Assisting in the preparation and cleansing of data to be migrated into the Salesforce platform, ensuring accuracy and completeness.
- **Change Leadership:** Demonstrating strong leadership to drive change and adoption of the Salesforce solution across the organisation.
- **Security Requirements:** Communicating any specific security requirements or protocols that need to be integrated into the Salesforce solution.
- **Constructive Feedback:** Providing timely and constructive feedback throughout the project lifecycle.
- **Success Metrics:** Working together to define and agree on success metrics and evaluation criteria to assess the project's outcomes.
- **Risk Management:** Participating in risk management activities, including the identification, assessment, and mitigation of potential risks to the project.
- **Budget Management:** Ensuring timely approval of budgets and efficient management of project finances in line with agreed contracts and milestones.
- **Payment Schedules:** Adhering to agreed payment schedules to ensure the smooth progression of the project.



ABOUT REPLY

Reply is a company that specialises in Consulting, Systems Integration and Digital Services with a focus on the conception, design and implementation of solutions based on the new communication channels and digital media.

Reply partners with key industrial groups in defining and developing business models made possible by the new technological and communication paradigms such as Artificial Intelligence, Big Data, Cloud Computing, Digital Communication, the Internet of Things and Mobile and Social Networking. In so doing, it aims to optimise and integrate processes, applications and devices.

Reply's offer is aimed at fostering the success of its customers through the introduction of innovation along the whole economic digital chain. Given its knowledge of specific solutions and due to a consolidated experience, Reply addresses the main core issues of the various industrial sectors.

Through its network of specialist companies, Reply supports some of Europe's leading industrial groups in Telco & Media, Industry & Services, Banks & Insurance, and Public Administration to define and develop business models, suited to the new paradigms of Artificial Intelligence, Big Data, Cloud Computing, Digital Media and the Internet of Things.

We make innovation happen.

We started with a small team and a purpose: to help the digital revolution happen. Today, we are a team of more than 14,600 people in 16 different countries but we still have the same DNA, made up of agile, vertical task forces and an inner passion for innovation.

We are a decentralised network of specialised companies.

Among Replyers, you will find passionate geeks, visionary strategists, and creative minds, each with sharp skills in a specific business, who cooperate together and never stop learning from each other.

Make forward, act sustainably.

We know a sustainable future is possible and technology can be a strong asset to reach it. As leaders in digital transformation, we push for change and operate in full accordance with the highest ethical standards and with respect for the rights of future generations