

SALESFORCE MARKETING CLOUD IMPLEMENTATION & COMMUNICATIONS TRANSFORMATION

Service Definition
G-Cloud 15

REPLY

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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.

Reply 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
- Marketing cloud technology capability assessment and future-state recommendations. - Salesforce Marketing Cloud training. - Salesforce Marketing Cloud discovery & design. - Salesforce Marketing Cloud strategy, planning and activation. - Customer journey mapping. - SC Cleared staff and onshore talent. - Salesforce expert in majority of Salesforce products.	- Deployment of UK Based marketing certified specialists. - Increased Salesforce return on investment. - Increased click through and personalised engagement. - Delivery of cost affective and scalable Marketing solutions with Salesforce. - Delivery of frameworks and accelerators to drive speed to market.

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.

Presales

Work with our dedicated presales team free of charge, to capture high level requirements, turning business processes and pain points into Salesforce Marketing Cloud functionality. We find a lot of our clients aren't too sure what Salesforce can look like for them, or what their requirements are, this is where our presales team will help you understand how you can take all your current business processes to the next level. This process can be in person or remote and after discovery workshops with you, the presales team will produce a proposal for implementation. The proposal will be played back to yourself, showing some of the following:

- Business value for senior level stakeholders & decision makers
- Recommended Salesforce Licenses based on system requirements
- Recommended roles from yourself for a project
- High level solution we are proposing to implement
- Indicative timelines and costs

Implementation Process

The implementation process of Salesforce Marketing Cloud is structured to ensure a seamless transition and maximise the effectiveness of your communications strategy. This process can include:



- **Discovery and Strategy Development:** We begin with a thorough discovery phase to understand your current communication practices, challenges, and objectives. This informs a tailored strategy that aligns Salesforce Marketing Cloud's capabilities with your goals for customer engagement.
- **Technical Configuration and Customisation:** Our certified experts configure and customise Salesforce Marketing Cloud to meet your unique requirements. This includes setting up email templates, journey builders, social media integrations, and mobile messaging capabilities, ensuring a cohesive and integrated approach across all communication channels.
- **Data Integration and Segmentation:** A crucial step is integrating Salesforce Marketing Cloud with your existing data sources to enable sophisticated segmentation, personalisation, and automation. We ensure that data flows seamlessly between systems, providing a 360-degree view of your customers and enabling targeted, relevant communications.

Testing and Validation

Our Testing and Validation stage is the safeguard to ensure the robustness, reliability, and security of the Salesforce solution before it goes live. Our commitment to excellence as a summit Salesforce partner is demonstrated through thorough testing protocols that encompass every facet of the implementation.

Functional Testing: Our quality assurance starts with rigorous functional testing to validate that every feature operates according to the specifications agreed upon with the client. This includes:

- **Unit Testing:** Conducted by developers to ensure that individual components function correctly in isolation.
- **System Testing:** Ensuring the integrated system functions cohesively, adhering to all functional requirements.
- **User Acceptance Testing (UAT):** Facilitated sessions where end-users test the system against real-world scenarios to confirm the system's effectiveness and user-friendliness, aligning with public sector service standards.

Performance Testing: We conduct performance testing to evaluate the system's stability and responsiveness under various load conditions, which includes:

- **Load Testing:** Simulating typical and peak loads to ensure the system performs well under expected public sector usage scenarios.
- **Stress Testing:** Pushing the system to its limits to identify breakpoints, which is crucial for public sector applications that must perform reliably under all circumstances.

Security Testing: Adhering to the highest standards of public sector data protection and cybersecurity, we perform:

- **Vulnerability Assessments:** Identifying potential security vulnerabilities within the Salesforce solution.
- **Penetration Testing:** Ethical hacking techniques are used to assess the security of the system against potential breaches, ensuring compliance with NCSC guidelines.

Accessibility Testing: In line with GDS principles, we ensure that all user interfaces are compliant with accessibility standards, allowing all members of the public, including those with disabilities, to interact seamlessly with the system.

Regression Testing: Any time changes are made, a comprehensive regression test suite is run to ensure new code hasn't affected existing functionality.

Compliance Testing: We rigorously test the solution against relevant public sector compliance and regulatory standards, ensuring the system adheres to all statutory obligations.

During this stage, we work closely with our public sector clients, ensuring full transparency and enabling a collaborative approach to address any issues. Our testing and validation stage concludes with a detailed test report and a validation certificate, affirming the readiness of the Salesforce implementation for deployment in the public sector environment.

Upon completion of testing and validation, we ensure that all stakeholders, including IT staff and end-users, are confident in the system's functionality, performance, security, and compliance. This diligence sets us apart, reaffirming our position as a trusted Salesforce partner.



Go-Live & Transition Support

As the culmination of our development and training phases, the 'Go-Live' stage is carefully orchestrated to ensure a smooth transition. Our preparation includes:

- **Final Data Migration:** Securely transferring all current and historical data into the Salesforce system.
- **User Verification:** Ensuring all users can access the system with the correct permissions and roles.
- **System Health Check:** Performing a full system review to confirm that all customisations and integrations are functioning as intended.
- **Go-Live Rehearsal:** Conducting a mock go-live event to ensure every team member is prepared for the actual transition.

Go-Live Execution:

The transition to Salesforce is closely managed to minimise disruption. Our approach can include:

- **Phased Rollout:** Introducing the Salesforce system in phases, if appropriate, to mitigate risk.
- **Real-Time Monitoring:** Monitoring system performance in real-time to identify and address any issues promptly.
- **Stakeholder Communication:** Keeping all stakeholders informed with regular updates throughout the go-live process.

Post Go-Live Support:

In the days following the transition, our team remains on high alert to support any immediate needs:

- **Hypercare Support:** Providing intensive support immediately after go-live to quickly resolve any teething problems.
- **Issue Resolution:** Establishing clear processes for logging and resolving any issues encountered by users.

By providing a safety net during this critical phase, we ensure that you are not just launching a new system but are also laying the foundation for ongoing improvement and success.

Transition Support & Managed Service

As users settle into the new Salesforce environment, we provide ongoing support to ensure sustainable success in the form of a Managed Service:

- **Dedicated Support Desk:** Setting up a dedicated support desk for users to contact with questions or issues.
- **Support Workflows:** Implementing clear workflows for escalating and resolving support requests.
- **Post-Implementation Review:** Conducting a thorough post-implementation review to assess the project's success and identify areas for improvement.

Continuous Improvement:

Our support extends beyond the initial go-live with a focus on continuous improvement:

- **Feedback Loops:** Establishing channels for ongoing user feedback to inform system enhancements.
- **Performance Analytics:** Utilizing Salesforce's analytics tools to monitor system usage and performance, ensuring the platform continues to meet the organization's needs.
- **Regular Health Checks:** Scheduling periodic Salesforce health checks to optimize system performance and security.



HOSTING INFRASTRUCTURE

Disaster Recovery

Salesforce is responsible for the provision and execution of platform-level disaster recovery, including the operation of its hosting infrastructure, data replication, and the initiation of any required site or instance switch in the event of a major incident. This typically involves failing services over between geographically separated data centres in line with Salesforce's resilience and recovery procedures. While the decision and execution of a site switch sits solely with Salesforce, we provide a consultative support layer to customers throughout the process. This includes helping interpret Salesforce communications, advising on potential business and integration impacts, supporting readiness activities, and assisting with coordination and communication during and following any Salesforce-led recovery event.



ONBOARDING

Onboarding to Salesforce Marketing Cloud Implementation & Communications Transformation 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.

Initial Engagement: Our onboarding commences with a thorough initial engagement process where we:

- **Conduct Workshops:** Lead discovery workshops to understand your organisational goals, challenges, and processes.
- **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.

Account Setup: Following the initial engagement, we proceed with:

- **Secure Data Handling:** Establish protocols for secure data handling, adhering to the UK GDPR and public sector standards.
- **System Environment Setup:** Configure the Salesforce environment to align with your operational structure and security requirements.

Team Formation: A dedicated project team is assembled, comprising:

- **Certified Salesforce Professionals:** A blend of roles including project managers, business analysts, Salesforce architects, and consultants, all bringing a wealth of experience and over 900 Salesforce certifications to the project.
- **Public Sector Specialists:** Advisors who understand the nuances of public sector work and can ensure that solutions are fit for purpose.

Stakeholder Engagement: We engage stakeholders throughout the onboarding phase by:

- **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.

Customised Solution Blueprint: Our team crafts a tailored solution blueprint which includes:

- **System Design:** Architecting a Salesforce solution that is customised for your public sector needs.
- **Integration Plan:** Developing a comprehensive plan for integrating existing systems with Salesforce.

Knowledge Transfer and Training Plan: An integral part of our onboarding is the knowledge transfer:

- **Training Schedule:** We establish a training schedule that aligns with your team's availability and project milestones.
- **Resource Allocation:** Allocating resources such as user manuals, best practice guides, and access to our online training portal.

User Adoption Strategy: To ensure high levels of user adoption, we:

- **Develop Communication Plans:** Crafting internal communication plans to keep all users informed and engaged.
- **Create Adoption Metrics:** Setting up metrics to measure adoption rates and user engagement.

Support Structure Establishment: A robust support structure is established, providing:

- **Dedicated Support Channels:** Offering dedicated communication channels for any enquiries or support needed throughout the onboarding process.
- **Early Life Support:** Implementing an early life support system to swiftly address any challenges that arise as users start interacting with the new system.

Transition to Project Delivery: The onboarding phase concludes with a smooth transition to the project delivery phase, which involves:

- **Project Plan Sign-off:** Obtaining formal sign-off on the project plan, ensuring all parties are aligned on the delivery timeline and outcomes.



- **Kick-off Meeting:** Hosting a kick-off meeting to mark the beginning of the project implementation phase, bringing together all 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.

Transition Planning: We initiate offboarding with a detailed transition planning phase, which involves:

- **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.

Data Extraction and Handover: A critical component of offboarding is the secure and orderly transfer of data.

- **Data Extraction:** Extract all relevant data from the Salesforce system, following the highest standards of data security and integrity.
- **Data Handover:** Transfer data to the designated system or team, ensuring compatibility and usability, accompanied by detailed data maps and schemas.

Knowledge Transfer: We conduct a thorough knowledge transfer to the succeeding team or supplier, which includes:

- **Debrief Sessions:** Detailed sessions explaining the system architecture, configurations, custom developments, and operational processes.
- **Handover of Materials:** Provision of all training materials, system manuals, and user guides to the incoming team.

Offboarding to Another Supplier: Should the service be transitioning to another supplier, we ensure:

- **Supplier Engagement:** Engage with the incoming supplier throughout the offboarding process for a seamless transition.

Final Audit and Closure: We conclude offboarding with:

- **Offboarding Audit:** Perform an audit to ensure that all contractual and service obligations have been fulfilled.
- **Closure Meeting:** Hold a final meeting with all stakeholders to confirm the completion of the offboarding process and to formally close the 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 the Salesforce environment 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

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.
- System Access: Providing our team with timely access to existing systems.
- IT Support: Ensuring that your IT infrastructure is prepared for the Salesforce implementation.
- Change Leadership: Demonstrating strong leadership to drive change and adoption of the Salesforce solution across the organisation.
- User Adoption Strategy: Collaborating with us to develop and implement a user adoption strategy, including communication, training, and support plans.
- 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