



Trust. Value. Velocity

G-Cloud 15

Salesforce Financial Services Solution

Contents

1.	About Mastek	3
	Mastek's global presence	4
	Mastek and Technology in the Public Sector	13
2.	Summary	14
3.	Mastek's Service	15
3.1	Typical outcomes	15
3.2	Our Implementation Approach	15
4.	Key Features	17
4.1	Core Financial Services Cloud capabilities	17
4.2	Service and operations capabilities (Salesforce Platform + Service Cloud, commonly used with FSC)	17
4.3	Data, analytics and automation	17
5.	Business Benefits	18
5.1	Single, trusted view of the customer	18
5.2	Improved customer experience and service consistency	18
5.3	Faster case handling and resolution	18
5.4	Increased operational efficiency	18
5.5	Better management of complex relationships	18
5.6	Stronger governance, auditability and accountability	18
5.7	Improved data quality and integrity	18
5.8	Enhanced reporting and operational insight	19
5.9	Improved staff experience and capability	19
5.10	More effective cross-team collaboration	19
5.11	Better support for vulnerable or high-risk customers	19
5.12	Faster implementation of service improvements	19
6.	Technologies, Languages, Methodologies and Vendor Support	20

1. About Mastek

Mastek has been delivering Critical National Infrastructure programmes in the UK Public Sector for over a decade now. We are trusted with multiple contracts for the UK Government across Central Government, Health, Local Government, Policing, Public Protection and Defence. The majority of our national services are delivered in a context of high uncertainty and complexity while collaborating in multi-supplier environments.

While working for these large and complex public sector organisations, we have continuously refined our management, delivery and underlying processes to reflect key learnings from the sector:

Working through a complex stakeholder landscape: We understand the importance of establishing effective communication channels, building trust and fostering a collaborative working environment that empowers stakeholders to contribute meaningfully to the project's success. Our approach is based on a deep understanding of stakeholder needs and requirements. We leverage our experience and expertise to design governance structures that promote transparency and accountability and use data-driven reporting mechanisms to ensure stakeholders have real-time visibility into project status and progress. At the Home Office, GDS, Ministry of Defence and NHS, we have a proven track record of working seamlessly with large stakeholder groups, including civil servants.

Standards, compliances: We comply with >20 policies and standards, including Government Digital Standards and Government CDDO Service Toolkit covering service standards, service manuals, TCoP, API technical and data standards. Our stringent governance, methods, playbooks and processes (manual and automated) span across service delivery phases, ensuring continuous compliance.

Policy-driven: Policies and procedures largely drive Public Sector organisations. We need to be Agile and flexible to meet demands for policy/regulatory changes, geopolitical events and ministerial commitments.

Culture: We adhere to the Civil Service core values of integrity, honesty, objectivity and impartiality. Key behaviours we promote stem from a combination of Civil Service and Mastek values. These include being passionate, accountable, sustaining predictable and repeatable outcomes, not transferring risk, transparent, leading to enable, acting with transparency, practising a no-blame culture and being flexible.

Mastek's global presence



Australia

Austria

Bahrain

Belgium

Brunei

Canada

Denmark

Egypt

Estonia

Finland

France

Germany

Hungary

Iceland

India

Indonesia

Ireland

Italy

Japan

Jordan

Kenya

Kingdom of Saudi Arabia
(KSA)

Kuwait

Latvia

Luxembourg

Malaysia

Netherlands

New Zealand

Norway

Oman

Philippines

Poland

Romania

Singapore

Slovakia

Spain

Sri Lanka

Sweden

Switzerland

United Arab Emirates (UAE)

United Kingdom

USA

Did you know?

75%

Around three quarters of Local Authorities in the UK who run Oracle have worked with Mastek on their digital transformation journey.

300,000 Users

Supported managing up to 750,000 logins per month to MOD through Identity and Access Management

Crime reduction

We designed, built and manage the UK's Strategic National DNA Database that helps Forensics and Law Enforcement Authorities investigate and stop crime

90% faster

We enabled the National Health Service (NHS) to drive 90% faster response times with a billion pharmacy prescriptions a year.

Technical Service Desk

We provide level 2 and ITSM support for the One Login service at Government Digital Service

22k

Our systems enable 22,000 schools to function efficiently every day of the year.

Healthcare and manufacturing

We delivered Finance, HCM and Supply Chain transformations for clients across health and manufacturing globally powered by Oracle Cloud

Transformation of trade

Transforming UK's trade with the EU and rest of the World by supporting Customs Declarations Services and its trade users.

99.99% Availability

We support the Home Office Biometrics (HOB) Platform, Having migrated it to an AWS platform.

Our digital and cloud services portfolio

Powered by Glide 4.0 and value-based delivery

Industry-aligned approach with business outcomes

Digital engineering and experience	• Cloud engineering and migration • Legacy modernisation • Low code / no code App Dev • DevSecOps • Enterprise integration	• MACH • Digital commerce • UX and CX • Platform engineering • Gen AI software development.
Oracle Cloud and enterprise apps	• Oracle Cloud applications • Oracle consulting • Oracle Cloud infrastructure	• Value-based delivery • Glide 4.0.
Data, automation and AI	• Cloud data modernisation • Business Intelligence and Analytics	• Data management • Intelligent automation • Data Governance.
Salesforce	• Sales Cloud • Service Cloud • Marketing Cloud • Industry Cloud	• Experience Cloud • Mulesoft
Innovation labs and platforms	• Enterprise workforce scheduler • Connected enterprise • icx-Pro – intelligent part assistant	• iLeaseFinPro.
Cloud enhancement managed services	• Oracle managed services • Digital managed services • Commerce managed services	• Salesforce managed services.

Home Office Biometrics (HOB)

Public sector platform modelled 24x7 with 99.99% availability

Problem

- Transition business-critical Platform services from incumbent supplier with minimal risk
- Migration from private cloud to AWS Cloud.

Solution

- Migrated the infrastructure from private cloud to AWS
- Embedding Kubernetes Containerisation
- Introduced Docker and fully-baked AMIs
- Supporting the platform's self-service functionality using Jenkins Jobs
- Applying security updates to the OS base images through pipelines
- Instituting automated patching and testing for infrastructure images
- Support of configuration, test and releasable artefacts through the pipeline.

Outcome

- **Zero impact** on live service
- **80% automation** of SIT
- Environment Provision **2 days to 1 hour**
- **5x scalability** in handling student BRPs
- Cost saving the authority circa **£9.5m/year.**
- Won the '**Best Use of Cloud Services**' award
- **35%** Incident Volume Reduction.



Government Digital Service

Problem

GDS initiated the One Login programme to create a single front door for identity verification and authentication, which could be adopted and scaled across all government departments. This would improve the user experience by providing the public with a single identification and verification service for the government, reduce costs as each department no longer required its own identity service and reduce identity fraud and identity-enabled crime.

GDS released a tender in June 2023 to provide a Technical Service Desk (TSD) managed service for the One Login service. This service would provide a single point of contact for level 1 and 2 service support as part of the wider support ecosystem. It would be provided in the UK and replace the incumbent's scaled-down non-ITIL-aligned break-fix service.

Solution

In September 2023, Mastek were successfully awarded the TSD contract to deliver TSD on behalf of GDS. GDS had an extremely aggressive programme driven by the onboarding of HMRC as a user, which was a major milestone planned for February 2024, migrating new and existing HMRC users to the One Login platform. The TSD service was expected to go live in November 2023. This was an extremely complex programme which, within this timescale, would deliver:

- The contact centre provider for level 0 directly facing the public
- The TSD supplier in place directly facing all government departments
- The TSD supplier in place providing L1 and L2 engineering support and monitoring
- Continued delivery on the One Login backlog of features
- Continued migration of smaller government departments to the platform.
- Delivery of a new ITSM toolset to be configured for use by GDS and the One Login programme, integrating level 0 to level 3 support
- Working as one team, Mastek quickly integrated into the programme, appointing the leadership team early in the engagement. We collaborated with GDS from the outset, ensuring we tailored the service to their expectations rather than delivering what was written in the contract.

Our leadership team consisted of:

- Service Management Vice President
- Programme Director
- Chief Technology Officer
- Programme Management office lead.

Outcome

At its height, the programme team was circa 15 strong, covering programme/project delivery, PMO, architecture, fraud, security, support, omni-channel and quality assurance. The service team is currently in place providing circa 21 resources now covering end-to-end service management, service delivery and L1 and 2 engineering roles.

As the One Login migrations continue, Mastek is supporting Government departments onboarding to the platform as they transition into the new service and provide One Login a secure Technical Service Desk managed service with:

- Omni channel access for other government departments via telephony, email and web form
- Provision of L1 and L2 engineering support
- 24x7, 365 days a week cover
- 24x7x365 eyes on monitoring service
- Fraud detection and security, GDPR compliant
- End-to-end (L0-3) incident and problem management
- End-to-end 24x7 Major incident management (MIM)
- On-call/call-out engineering support, incident and MI management
- Adherence to stringent SLAs on incident response, call handling and fix times
- End-to-end monthly service reporting alongside TSD KPI and SLA reporting.
- A shift left culture and mindset, reducing the impact of service on product teams (L3)
- Support with service maturity in the programme, preparing GDS to run critical national infrastructure.



Internet-facing platform and applications for Army Digital Services

Developed mobile app and web app with 24*7 high availability

Problem

- New Defence Gateway Portal
- Combine all internet-facing applications into one
- Easy to use
- Enable easier access to the MySeries portfolio of products.

Solution

Designed and developed the following easy-use Progressive Web Apps:

- Defence Gateway Landing Page
- My Leave App
- My Expenses App
- My Health App
- My Details App
- My Appraisal App
- My Admin App
- COVID-19 Reporting Tool
- Commanders' COVID-19 Tool.

Outcome

- Delivered 20+ successful projects
- Deployment Automation
- £7.5m in savings annually
- Zero Downtime
- Environment creation in hours.



TOOLS



Delivered a platform for the Department for Health and Social Care

Delivered capability supporting 200k+ tests in a day,
traced millions of COVID-19 infections

Problem

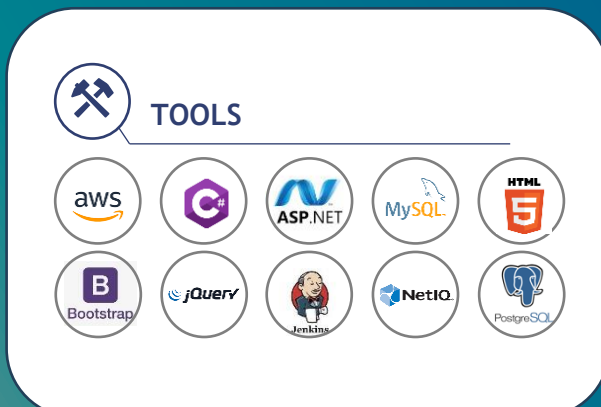
- Leveraging DevOps platform based on reusable GitHub, AWS and Azure DevOps Pipelines
- Introduce more flexible, scalable and reusable IaC capabilities
- Implement CI/CD pipelines.

Solution

- Uplifted from Cloud Formation into Terraform (IaC)
- Pre-built the AMIs using Packer, with automated security checks
- Immutable infrastructure, thus eliminating the risks of partial upgrades and patches
- Continual Cost Optimisation processes and other service functions, such as Change and Risk management
- Migrated into an organisation-wide collaboration toolset. This included Jira, Confluence, Trello, Miro, Teams, SharePoint, O365, Slack, etc.

Outcome

- 75% reduction in lead time due to pre-built AMIs
- Zero Downtime Deployments
- Delivered a Platform - Secured, multi-tenanted hosted on Azure and AWS in 5 weeks
- Cost reduction achieved through close monitoring of resource utilisation.



Mastek and Technology in the Public Sector

Technical Capabilities	Relevant Technology Capability	Mastek Scale
Software Development Continuous Integration, Platform - Other Products, Cloud Collaboration Tools		Software Engineering 2354 FTE
QA and Test: API, Automated Functional and Compatibility, Accessibility & Performance		QA and Testing 774 FTE
Cloud Platforms Amazon Web Services AWS Microsoft Azure		Cloud Platforms 1046 FTE
Data BI/MI Components, Integration		BI and Visualisation 725 FTE
User-Centered Design		UCD 25 FTE
Office Automation Tools		Collaboration 4565 FTE

2. Summary

As a Summit-level Salesforce systems integration partner, Mastek focuses on customers looking to leverage Salesforce CRM, Agentforce A.I. and Industry cloud solutions to unify data and processes across their entire enterprise. We specialise in simplifying digital solutions for customers to reduce complex integrations and unify multiple cloud platforms.

We are customer-led service experts who take service to a whole new level, partnering to deliver excellence for all our customers.

With our proven Roadmap to Results process, our team adds their expertise to your team to craft innovative solutions that answer your organisation's operational challenges today and grow as you grow.

Our digital application and engineering services help our clients achieve their digital journey at speed and with scale. We provide industry-specific, omnichannel, multi-cloud Salesforce expertise and system integration expertise across all Salesforce capabilities from Sales Cloud to Agentforce, MuleSoft to Informatica.

We provide services to build API ecosystems, modernise legacy systems with new-age digital technology platforms using micro-services, migrate to cloud platforms and ensure quality delivery with Agile service methodologies and an integrated DevSecOps approach.

3. Mastek's Service

Mastek provides end-to-end delivery of Salesforce Financial Services Cloud (FSC) for public sector financial services, including discovery, solution design, configuration, integration, data migration, security and compliance controls, testing, training, go-live and optional managed support. Enables a single, secure customer view, relationship-based servicing, case management and automated workflows across channels.

This service offers a comprehensive approach to delivering Salesforce Financial Services Cloud as a configurable CRM and service platform for organisations delivering financial services outcomes, including advisory services, consumer support, regulated interactions, case handling and relationship management.

We help you design and implement FSC to:

- Create an accurate, governed single view of customer and household.
- Manage complex relationships (individuals, households, organisations, trustees, carers, powers of attorney).
- Streamline service, case and interaction management.
- Improve transparency, auditability and reporting.
- Automate journeys and tasks while maintaining appropriate controls.
- Integrate with existing back-office and data platforms.

Delivery is modular: you can procure a full implementation, targeted enhancements, or a managed service to operate and continuously improve your FSC solution.

3.1 Typical outcomes

- Faster resolution of enquiries and cases through guided processes and automation.
- Improved customer experience with consistent, omnichannel servicing.
- Better insight and reporting for operational management and assurance.
- Reduced manual effort via workflow, templates and reusable components.
- Stronger data governance and security posture with role-based access and audit trails.

3.2 Our Implementation Approach

a) Discovery and service assessment

- Current-state assessment (processes, data, integrations, risks, constraints)
- User research and service design workshops (personas, journeys, service blueprinting)
- MVP definition and prioritised roadmap
- Delivery plan, cost model and benefits case aligned to measurable outcomes.

b) Solution design

- FSC data model and relationship design (households, affiliations, customer types)
- Information architecture and case taxonomy
- Security model design (sharing, segregation of duties)

- Integration design (APIs, middleware patterns, eventing where appropriate)
- Non-functional design (availability, performance, logging, monitoring).

c) Configuration and build

- FSC configuration (objects, page layouts, record types, validation rules)
- Service Console setup and agent productivity enhancements
- Case management workflows, queues, routing and templates
- Action Plans and guided processes (Flows)
- Reporting and dashboards
- Reusable components and governed configuration (naming standards, packaging approach).

d) Integrations and data migration

- Integration build using APIs (REST/SOAP), middleware, or managed connectors (as appropriate)
- Data mapping, cleansing, transformation and migration tooling setup
- Migration rehearsals and cutover planning
- Data validation and reconciliation reporting.

e) Testing and quality assurance

- Test strategy and test packs (unit, system, integration, UAT)
- Performance testing approach for peak scenarios
- Security testing support (configuration review, vulnerability assessment support)
- Release governance and deployment strategy.

f) Adoption, training and change

- Role-based training materials and delivery (agents, supervisors, admins)
- Playbooks, SOPs and knowledge articles
- Hypercare support post go-live.

g) Managed service (optional)

- Incident, problem, change and release management
- Admin and platform operations
- Enhancement backlog management and sprint delivery
- Monitoring, reporting and continual service improvement.

4. Key Features

4.1 Core Financial Services Cloud capabilities

- Financial Account model to represent accounts, products and holdings (configurable for your context).
- Households and Relationship Groups to model real-world relationships and servicing contexts.
- Relationship and Affiliation Mapping for individuals, organisations and intermediaries.
- Interaction summaries and contact history for consistent service delivery.
- Client/Customer profiles combining demographic, interaction, account and case context.
- Service processes with case management, queues, routing and knowledge.
- Action Plans for repeatable, guided servicing (e.g., onboarding, reviews, eligibility checks).
- Record-level security with profiles, permission sets, roles, sharing rules and teams.
- Audit and change tracking using platform capabilities and event monitoring options (where licensed).

4.2 Service and operations capabilities (Salesforce Platform + Service Cloud, commonly used with FSC)

- Omnichannel routing (case assignment based on skills, capacity, priority).
- Knowledge management with articles, templates and approval workflows.
- Digital engagement options (secure messaging/chat where licensed).
- Email-to-Case / Web-to-Case and structured intake forms.
- Service console with guided UI, macros, quick text and productivity tools.
- SLAs and entitlements (where applicable) and performance reporting.

4.3 Data, analytics and automation

- Workflow automation using Flow (approvals, tasks, branching logic).
- Document generation / correspondence approach (native + partner tooling patterns).
- Dashboards and reports for operational KPIs and assurance reporting.
-

5. Business Benefits

5.1 Single, trusted view of the customer

- Consolidates customer, household, relationship, interaction and case data into one authoritative platform.
- Reduces duplication, conflicting records and fragmented information across teams.
- Improves confidence in decision-making by using consistent, governed data.
- Enables staff to understand the full customer context at the point of service.

5.2 Improved customer experience and service consistency

- Ensures customers receive consistent responses regardless of channel or advisor.
- Reduces the need for customers to repeat information across interactions.
- Supports more personalised, context-aware conversations.
- Improves trust through clear, auditable interaction histories.

5.3 Faster case handling and resolution

- Streamlines case intake, routing and prioritisation.
- Reduces hand-offs and delays through automated workflows.
- Enables quicker access to relevant customer and case information.
- Shortens average handling time and improves service responsiveness.

5.4 Increased operational efficiency

- Automates repeatable tasks and service processes.
- Reduces reliance on manual workarounds and spreadsheets.
- Improves agent productivity through guided workflows and service consoles.
- Allows staff to focus on higher-value, customer-facing activities.

5.5 Better management of complex relationships

- Accurately models households, organisations and interconnected relationships.
- Supports scenarios involving carers, representatives, intermediaries and trustees.
- Improves servicing for vulnerable or multi-party customer situations.
- Reduces risk caused by incomplete or misunderstood relationships.

5.6 Stronger governance, auditability and accountability

- Provides clear audit trails of interactions, decisions and changes.
- Supports transparent case ownership and responsibility tracking.
- Improves evidence capture for internal review and external scrutiny.
- Reduces operational and compliance risk.

5.7 Improved data quality and integrity

- Applies validation rules and structured data capture.

- Reduces inconsistent or incomplete records.
- Improves downstream reporting, analytics and insight.
- Supports long-term data governance objectives.

5.8 Enhanced reporting and operational insight

- Provides real-time dashboards for service performance monitoring.
- Improves visibility of workloads, backlogs and service trends.
- Enables data-driven management decisions.
- Supports outcome measurement and continuous improvement.

5.9 Improved staff experience and capability

- Provides intuitive interfaces tailored to user roles.
- Reduces training time for new staff.
- Improves staff confidence through guided processes.
- Helps retain knowledge within the system rather than individuals.

5.10 More effective cross-team collaboration

- Enables shared visibility of customer and case information.
- Reduces silos between service, operational and support teams.
- Improves handovers and internal communication.
- Supports joined-up service delivery.

5.11 Better support for vulnerable or high-risk customers

- Improves identification and flagging of vulnerability indicators.
- Supports consistent handling and escalation processes.
- Reduces risk of inappropriate or inconsistent responses.
- Enhances duty of care outcomes.

5.12 Faster implementation of service improvements

- Enables rapid configuration and deployment of new workflows.
- Supports iterative, user-centred service improvement.
- Reduces time from policy decision to operational delivery.
- Improves organisational agility.

6. Technologies, Languages, Methodologies and Vendor Support

#	Technologies	Languages	Methodologies	Vendor Support
1	Salesforce Financial Services Cloud	-	-	-
2	Mulesoft	-	-	-
3	Salesforce Service Cloud	-	-	-
4	Salesforce Sales Cloud	-	-	-
5	CRM Analytics	-	-	-

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