



Trust. Value. Velocity

G-Cloud 15

Salesforce Case Management Service

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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.

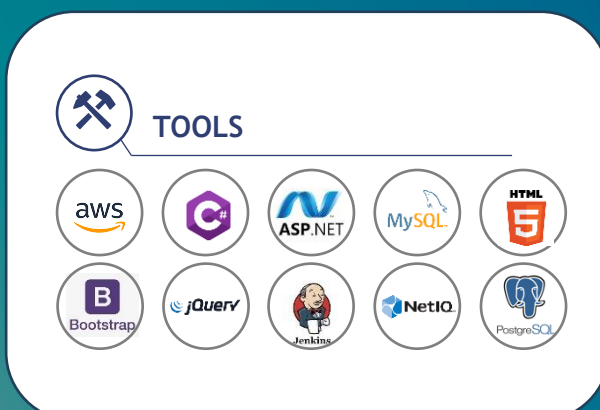
Solution

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.



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, reducing complex integrations and unifying 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

At Mastek, as a Salesforce implementation partner, we design, implement and optimise **Salesforce Service Cloud Case Management** to help organisations manage customer and citizen enquiries efficiently, consistently and securely. Our service provides end-to-end delivery, from discovery and solution design to configuration, integration, data migration, training and live support, aligned to Government Digital Service (GDS) principles and common public sector operating models (contact centres, back-office teams, shared services and multi-agency workflows).

We help you implement or improve:

- Omnichannel intake (web forms, email-to-case, phone, chat, messaging, portals).
- Case capture, triage, routing, escalation and resolution.
- Knowledge-led service and self-service.
- Service performance management (SLAs, entitlements, dashboards).
- Automation and AI readiness (rules-based, Flow and optional AI features where appropriate).
- Secure collaboration across teams and partners.

This service delivers a configurable Salesforce case management capability, utilising Salesforce Service Cloud (with optional Salesforce Experience Cloud for citizen/customer self-service). We tailor case data models, business rules and user experiences to your policies, statutory obligations and service standards.

Typical outcomes include:

- Reduced handling time through guided triage and automated routing.
- Improved service quality and consistency via knowledge and standardised processes.
- Better transparency through case status, audit history and analytics.
- Enhanced compliance through role-based access controls, field-level security and retention processes.
- Improved user satisfaction through simplified screens, templates and integrated channels.

Our approach is iterative and value-driven, utilising short delivery cycles and early user testing to ensure the solution works effectively for both frontline and back-office teams.

3.1 Our Implementation Approach

a) Discovery and service design

- Stakeholder and user research (frontline, back-office, managers, IT/security).
- Current-state mapping: channels, triage, handoffs, escalation paths.
- Service blueprint and target operating model alignment.
- Prioritised product backlog and MVP definition.
- Non-functional requirements: availability, performance, accessibility, retention.

b) Solution architecture and design

- Case data model design (objects, fields, record types).

- Routing, queues, ownership and escalation design.
- SLA/entitlements design aligned to policy.
- Knowledge architecture and taxonomy.
- Reporting and KPI framework.
- Integration and identity patterns (SSO, API, middleware approach).

c) Build, configuration and implementation

- Service Cloud configuration (case, Omni-Channel, macros, templates).
- Flows, validation rules, page layouts and Lightning Apps.
- Optional Experience Cloud self-service configuration.
- Integration build (APIs, middleware, inbound/outbound messaging).
- Data migration (cases, customers, reference data) and reconciliation.
- Document/letter generation integrations (if needed).
- Test automation approach and release pipelines (where applicable).

d) Test, readiness and go-live

- Unit/system/integration testing and UAT facilitation.
- Performance and resilience testing planning (where required).
- Cutover planning and runbooks.
- Hypercare and early-life support.
- Benefits tracking and KPI baselining.

e) Optimisation and managed improvement

- Service performance tuning (routing, UI efficiency, knowledge).
- Continuous improvement backlog.
- Governance, platform guardrails and release management.
- Adoption support and coaching.

4. Key Features

4.1 Core case lifecycle

- Case creation and capture from multiple channels (Email-to-Case, Web-to-Case, APIs, CTI/telephony integration, chat/messaging integrations, manual entry).
- Configurable case record types and page layouts for different service lines.
- Case status, milestones and stage tracking with full audit history.
- Case assignment and ownership at the individual, queue or team level.
- Escalations (time-based or event-based) to specialist teams.
- Case closure controls (mandatory fields, resolution codes, customer/citizen outcomes).
- Parent–child cases and case hierarchies for complex issues.

4.2 Intelligent routing and workload management

- Omni-Channel routing to balance workload across queues and agents.
- Skills-based routing (where appropriate) and priority handling.
- Assignment rules and Flow-based automation for triage and categorisation.
- Queues and service territories (optional patterns) to manage distribution.
- Macros and quick actions to accelerate common tasks.

4.3 Service levels, entitlements and SLAs

- Entitlements and milestones to measure response and resolution targets.
- Business hours and holiday calendars.
- Timers, breach warnings and escalation paths.
- SLA reporting dashboards and operational MI.

4.4 Knowledge-led service and self-service

- Salesforce Knowledge for guided resolution, internal articles and public content.
- Knowledge workflows: drafting, review, publication, versioning and archiving.
- Recommended articles on case screens.
- Self-service portals via Experience Cloud (optional) with:
 - Case logging and tracking
 - Knowledge search
 - Secure identity patterns (e.g., SSO via your IdP)
 - Deflection reporting and analytics.

4.5 Productivity and collaboration

- Email templates, letter templates (via document generation integrations) and response snippets.
- Chatter collaboration on cases (internal) with @mentions and file sharing.

- Task management and activity timeline.
- Approvals for sensitive decisions or policy exceptions.
- Einstein Activity Capture patterns (where appropriate and approved).

4.6 Automation and extensibility

- Salesforce Flow for automation of triage, routing, updates and notifications.
- Validation rules and guided UI for policy compliance.
- Apex and Lightning Web Components for custom logic and UI (when configuration is insufficient).
- Event-driven integration patterns via Platform Events (where appropriate).

4.7 Reporting and analytics

- Operational dashboards (case volumes, backlog, SLA performance, FCR, reopen rates).
- Agent/team performance metrics.

4.8 Service demand insights by category, geography, channel and customer type

- Audit and compliance reporting.
- Optional advanced analytics approach using CRM Analytics (if licensed).

4.9 Security and access control (platform features)

- Role hierarchy, profiles/permission sets, sharing rules.
- Field-level security and encryption options (where licensed/configured).
- Login controls, MFA, IP restrictions (implementation depends on your security posture).
- Audit trail and history tracking on cases and key objects.

5. Business Benefits

1. **Faster and more consistent case resolution:** Automated triage, intelligent routing and guided agent workflows ensure cases reach the right team first time, reducing rework, handoffs and delays. Standardised processes and knowledge-driven resolution improve first-contact resolution rates and reduce average handling time.
2. **Improved service quality and customer/citizen satisfaction:** Consistent handling of enquiries across all channels ensures a predictable, high-quality experience. Real-time case visibility, timely updates and clearer ownership increase trust and satisfaction for customers and citizens.
3. **Reduced operational costs:** Automation, macros and templates significantly reduce manual effort per case. Better workload distribution enables organisations to handle higher volumes without proportionate increases in staffing, thereby lowering the cost per interaction.
4. **Better workload management and staff productivity:** Omni-channel routing and prioritisation ensure fair distribution of work and reduce agent overload. Simplified screens, fewer clicks and guided processes allow agents to focus on resolution rather than administration.
5. **Stronger compliance with policies, SLAs and regulations:** Built-in entitlements, milestones and escalation rules ensure service-level commitments are consistently met. Mandatory fields, validation rules and audit trails support compliance with statutory, regulatory and internal governance requirements.
6. **Increased transparency and accountability:** End-to-end case tracking provides clear ownership, status and history at every stage. Managers gain real-time visibility of backlogs, bottlenecks and SLA risks, supporting proactive intervention.
7. **Improved management insight and decision-making:** Standardised reporting and dashboards provide reliable data on demand drivers, performance trends and service outcomes. Leaders can make evidence-based decisions on resourcing, policy changes and service improvements.
8. **Scalable platform that supports service growth and change:** The configurable Salesforce platform allows new service lines, channels and workflows to be added quickly. This promotes organisational growth, policy change and new digital initiatives without major re-platforming.
9. **Reduced risk through security-by-design:** Role-based access, field-level security and secure integration patterns protect sensitive data. Centralised controls reduce the risk of data leakage, unauthorised access and inconsistent handling of sensitive cases.
10. **Improved knowledge capture and organisational learning:** Knowledge articles capture institutional knowledge and best practice, reducing reliance on individual expertise. Over time, this improves consistency, accelerates onboarding and preserves organisational memory.
11. **Enhanced collaboration across teams and partners:** Shared case views, internal collaboration tools and controlled access enable smoother handoffs between frontline, specialist and back-office teams. This is particularly valuable for multi-agency or shared-service operating models.
12. **Better demand management and service optimisation:** Insight into case volumes, categories and peak demand helps organisations identify root causes and opportunities for deflection. This supports proactive improvements such as self-service, policy clarification or process redesign.

13. Faster onboarding and upskilling of staff: Guided workflows, embedded knowledge and intuitive interfaces reduce training time for new agents. Staff become more productive sooner, supporting resilience during peaks or periods of organisational change.
14. Improved resilience and business continuity: Cloud-based case management reduces dependency on local infrastructure and supports remote or hybrid working. Standardised processes ensure continuity even during staff turnover or unexpected demand spikes.
15. Long-term return on investment: A configuration-first approach reduces technical debt and ongoing maintenance costs. Continuous improvement capabilities ensure the platform continues to deliver value as organisational needs evolve.

6. Technologies, Languages, Methodologies and Vendor Support

#	Technologies	Languages	Methodologies	Vendor Support
1	Salesforce Field Service	-	-	-
2	Mulesoft	-	-	-

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Mastek UK Ltd.
100 Brook Drive, Green Park,
Reading, Berkshire
RG2 6UJ
+44 (0)118 903 5700
Email: g-cloud@mastek.com

