



G-Cloud 15

Customer-led Transformation: Salesforce Solutions

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Transforming Business using the Cloud

Enabling business and enterprise transformation using cloud-based platforms such as Salesforce is a complex, strategic consideration facing many private and public sector organisations. We have worked with many Central and Local Government clients to support the implementation of their business objectives using cloud technology.

Cloud technology and services have the potential to reduce costs, remove technology bottlenecks, and facilitate rapid business innovation. As a result, for most organisations globally, adopting cloud technology has become a question of “when and how” rather than “if”.

Opportunities for enterprises generally include a combination of one or more of the following:

- Implementing private and/or hybrid clouds for infrastructure and applications
- Smarter use of public cloud infrastructure for optimising existing business functions
- Using cloud for implementing new business services or digital operations
- Reducing cost by moving to consumption-based pricing models that only charge for the actual IT capacity and services used.

Migration or adoption of cloud-based platforms (such as Salesforce) must be properly choreographed for success. We understand the realities and the business and technical risks that should be fully considered, understood and mitigated before such a move. Critical considerations include:

- **Alignment of business and technology objectives.** This is essential to fully realise the targeted benefits of any cloud transformation or any refinement of existing cloud services. There can be a tendency to adapt cloud systems to fit current ways of working, rather than adopt and standardise processes where possible. The trade-offs between business, customer and technology requirements must be considered to make informed design decisions
- **Availability and reliability of services,** reducing the risk of service disruptions and downtime, service recovery effort and reputational impact
- **Data privacy.** Compliance with GDPR to understand where and how information can be stored or processed. The cloud model enables data to bounce swiftly around the world by using available server capacity in various geographic locations, but this must be within the bounds of what is permissible. This is ever more of a concern as organisations review their front office, back office and out of office experiences

- **Future Technology Trends.** Cloud applications are the stated direction of travel for the major application vendors, but any upgrade path must also cater for the future technology needs of the organisation and seek to minimise technical debt where possible.

A careful assessment of an organisation's needs and different cloud service provider offerings is required to enable the correct path to the cloud to be selected.

As a trusted advisor PwC provides the framework, and the wealth of private and public sector experience, to consider the combination of Business, customer experience and Technology activities outlined above. There is no single answer that covers each and every client organisation; we tailor our frameworks to client circumstances to support clients:

- As a partner through the complete lifecycle of strategy through to execution
- With customer-specific business issues encountered during implementation or running the business.

Customer-led Transformation: Salesforce Solutions Services

This section describes in more detail the service features and benefits included within this service definition document.

Customer-led Transformation: Salesforce Solutions Services

PwC offers design, configuration, development and support services across the Salesforce Platform. With experience in Sales, Service, Marketing, Commerce, Applications, Communities and mobile, we can design, configure, integrate, test, deploy, optimise and report on your Salesforce instance. With experience of multiple Salesforce implementations, we have accelerators that allow us to implement at speed and scale.

We can also offer ITIL aligned, ISO20000-1 accredited, business-focussed Application Management Service to:

- Maintain, operate and improve your systems, providing incident resolution, proactive problem management
- Release, configuration management, change and release management.

PwC also supports clients in meeting UK GDPR and public sector security requirements when delivering Salesforce services. This includes consideration of data residency and data handling, alongside secure delivery practices such as identity and access management, role-based access control models (RBAC) and embedding security into secure configuration, development, DevOps and release practices aligned to client security policies.

These services are provided as specialist cloud support and consultancy under G-Cloud 15 Lot 3, Supporting public sector organisations with Salesforce advisory, design & design assurance, implementation and optimisation services across the full delivery lifecycle.

Customer-led Transformation: Salesforce Solutions Services

- Cloud Enabled Business Transformation Delivery from Strategy to Execution
- Target Operating Model (TOM) design and development
- Portal - single access point to services for customers and partners
- Data management and insight platform leveraging Tableau and Salesforce analytics and AI capabilities
- Salesforce industry clouds applications including Education Cloud and Public sector solution
- Marketing Automation, Salesforce Marketing, Service and Community Cloud
- Business system integration via API and Mulesoft
- 360-degree view of the customer
- Low code/no code service construction and business driven development
- Customer identity and Access Management Prebuilt assets to accelerate requirements definition and delivery

Customer-led Transformation: Salesforce Solutions Services Benefits

- Aligned business and technical strategy using best in class digital
- Alignment to the Target Operating Model (TOM) for people, process and technology
- Alignment to customer engagement strategies and approaches
- Accelerated benefits realisation, tracking and reporting
- Release plans with scope, schedule, budget and benefits clearly defined
- A release approach that allows for gated governance and flexibility
- Rapid decision making and approvals in a managed delivery structure
- Identification of transition related cost savings and licensing
- Business change management, planning and management of security risks
- Transition and delivery management strategy and planning

Our experience in successful implementations allows us to bring knowledge of digital consultancy, customer strategy, front office and digital operations, automation, and more to each project. We'll bring our global and extensive Salesforce expertise together with our assets, design patterns and methods to help you implement at speed and scale.

The service features and benefits in this service definition document are outlined below and span the full lifecycle of design, implementation and ongoing support for Salesforce-based digital transformation.

1. Strategy and assess
2. Digital Design
3. Business Design
4. Business Change
5. Customer Engagement
6. Pre-deployment planning
7. Configuration
8. Post deployment support

1. Strategy and Assess

We can assist you in understanding the business need for Salesforce services, generate insights, and provide options for change. This will allow you to do the following:

- Assess and quantify the potential benefits of Cloud based services in your organisation based on an analysis of the user community
- Understand how Cloud based services will support services and enable outcomes and provide benefit compared to traditional deployment
- Develop and approve a business case to progress with confidence into design and implementation.

2. Digital Design

We can support you in your broader digital design, incorporating the new Salesforce solution into your existing landscape to design a coherent and robust technology base to support business operations.

This typically includes the following activities:

- Development of key design principles and approach based on the assessment phase
- Development of design requirements and artefacts required to facilitate configuration
- Design of detailed target operating model to optimise the technology deployment
- Design of target enterprise architecture to integrate with heritage and legacy components
- Definition of the implementation strategy
- Production of an updated business case.

3. Business Design

We can assist you with a business-led approach to design to align your Target Operating Model to the Salesforce solution standards through a process lens.

To develop a set of process designs that are aligned to your vision and objectives, our methodology ensures that even complex and intricate processes can be traced back to clear business and customer needs. We work with you to document the key objectives and principles that will underpin the target (“to-

be”) processes to be delivered. We also work with you to understand the wider implications across technology, data, people, and organisational structures, ensuring a holistic and integrated approach.

We produce the following artefacts to support this activity:

- A set of design principles outlining the fundamental requirements that each process must adhere to
- A catalogue of process maps outlining the key steps and decisions associated with each process, alongside an overarching process architecture
- A set of detailed design assumptions and questions associated with each process, identifying key decisions to be made by the business and any outstanding areas of uncertainty (for example, in relation to technology, data, people and organisational design)
- A set of Standard Operating Procedures (SOPs) providing clear, step-by-step guidance on how processes should be implemented

4. Business Change

We work with you to tailor our tried and tested approach, understanding what needs to change in your organisation and how best to achieve it using tools from our methodology. A detailed business change plan will be developed and, where appropriate, supported by the deployment of our industry leading ‘change-navigator’ tool. This will allow us to capture real-time insight into how the change is being understood, perceived, and ultimately implemented. Through interactive dashboards, we can prioritise time and energy on the areas that matter most; focusing on the critical few activities that will have the biggest impact on making the change successful. Typical business change activities will include:

- Understanding and communication your vision for the change
- Supporting leadership and key stakeholders to align around the scope of the change and what success looks like
- Developing a clear communication and engagement plan, including stakeholder management, communication tone and channel choice
- Undertaking Change Impact Assessments to understand who and how people will be impacted by the changes
- Supporting change readiness through staff engagement, training, upskilling and organisational role alignment to new ways of working

- Tracking and monitoring user readiness, adoption, and ongoing use of new tools and processes to embed the change and create sustainable new ways of working.

5. Customer Engagement

We can support you in the digital design of user-facing services and supporting operating processes, ensuring cloud-based solutions are usable, accessible, and aligned to how services are delivered and supported.

Where solutions include user-facing services, PwC design Salesforce and Experience Cloud (Customer or Citizen facing portal) in alignment with Government Digital Service (GDS) principles and recognised accessibility standards, such as WCAG, to support inclusive, accessible and usable digital services.

6. Pre-deployment solution planning

Through these services, we provide the foundation required to mobilise and prepare for the deployment of Salesforce solutions. These activities focus on ensuring the solution, delivery approach and delivery teams are ready before build and deployment begin to reduce delivery risk and support a controlled transition into implementation.

This typically includes:

- Solution design and readiness assessment
- Technical on boarding and planning
- Detailed requirements planning and design – Creation of build backlog
- Configuration planning and training of team members
- Methodology and governance confirmation
- Release and deployment planning

7. Configuration

The following configuration services will be performed to enable the build, integration and migration of your Salesforce solution in the existing IT landscape:

- **Platform Delivery:** Configuration and Implementation of the Salesforce solution components, including integration with the existing line of business systems

- **Data and Content Configuration:** Population, including migration of content and data from the existing solutions to Salesforce solutions
- **Platform Testing:** Robust testing of the platform in your environment, covering system testing, integrations and user acceptance testing.

8. Post deployment technical support

Our post deployment technical services can be provided to support the controlled deployment, stabilisation and operation of Salesforce solutions. These services are typically provided to support go-live activities and the transition into business-as-usual operations:

- Support for system, integration and user acceptance testing activities to validate solution readiness prior to and during release
- Support for controlled release activities, including cutover planning, deployment coordination and transition into live service
- Support to your IT Department in order to “go live” including organisational design, skills gap assessment and go-forward planning
- Development of training manuals and “train the trainer” support
- Early live support and hypercare following go-live, working closely with client team to stabilise services, resolve priority issues and support transition into business-as-usual operations
- Knowledge transfer, documentation and handover to the client team or alternative suppliers, enabling a smooth transition to business-as-usual operation.

9. Benefit realisation support

Delivering real business benefits through change requires dedicated focus and ongoing management. We provide benefit realisation support services to help organisations define, track and evidence the benefits associated with Salesforce enabled transformation, supporting sustained value beyond implementation.

These services include but are not limited to:

- **Accelerated benefits realisation support:** Through these services we can track where we are with respect to your end goal and track progress against your target business design. This supports management of priorities and dependencies as well as identifying and mitigating organisational or cultural complexities.

- **Assisted channel shift:** These services will support the process of continuous uptake by citizens and staff to promote channel shift and support the usage of key features of your cloud-based service. Our assisted channel shift services support you to change your organisation to maximise value and user-uptake of cloud services, helping to achieve benefits faster.



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