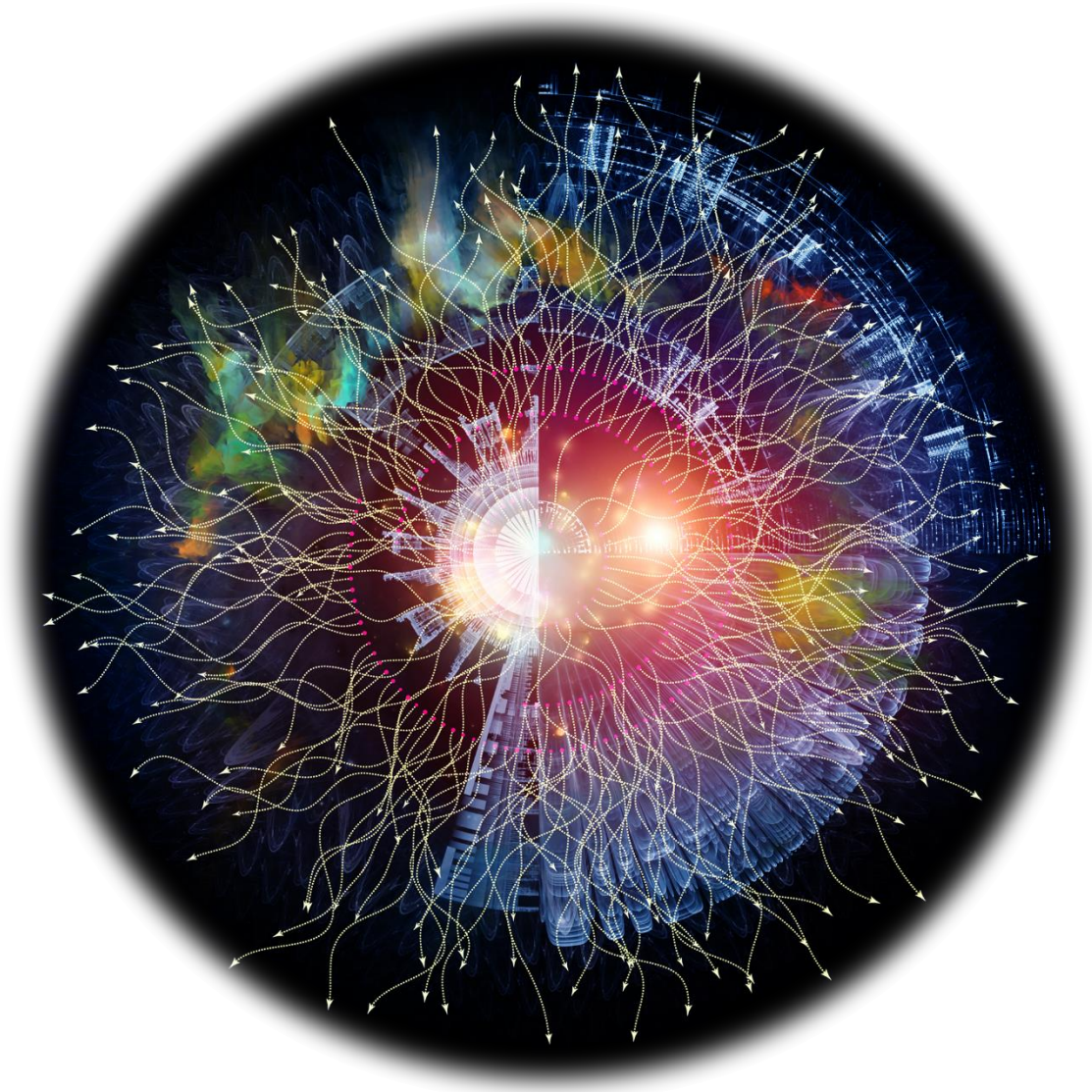




Higher Education Student Centric
Transformation (Salesforce)
G-Cloud 15 Service Definition Document
January 2026

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1 Deloitte Overview

As a leader in professional services, Deloitte LLP is committed to making an impact to our clients, our people and for society. We have over 27,000 staff based across the UK providing audit, risk advisory, tax, consulting, financial advisory and legal services to public and private clients across multiple industries. We work together to build trust, support inclusive growth, and build capability, enabled by our **breadth and depth of expertise across advisory, delivery, engineering and managed services.**

Our **public sector practice** serves Central Government, Government Agencies, Local & Regional Government, Defence, Security and Justice, Health and Social Care, Transport, Education and Housing. We also provide services to the Northern Ireland Office, Scottish Government, Welsh Government and Crown Dependencies.

Our Cloud Capability

At Deloitte, we help our clients **Imagine, Deliver and Run** the businesses of the future through the power of **Cloud**. We have deep Cloud architecture, engineering, operational, commercial, and business transformation expertise delivered by a team of more than 26,000 Cloud Practitioners globally. We have delivered over 2,000 cloud implementations over the past 5 years and have 60+ cloud centres of excellence supporting the delivery of cloud services to our clients.

In the UK, we have a team of over 100 Cloud managed service specialists plus the following certifications across AWS, Microsoft Azure, Google Cloud and Oracle Cloud Infrastructure (OCI):



We help our clients with all aspects of their journey-to-cloud and optimisation of their cloud and cloud-services investments. Our Cloud practice can support you to optimise your client investments, and to navigate your organisations cloud journey, providing specialist cloud architecture, engineering, and operational skills at all stages, with a large proportion of our team holding the clearances required to meet your specific security requirements.

Our AI Capability

Deloitte stands at the forefront of AI transformation and was recognised as a Leader in the 2025 IDC MarketScape for Artificial Intelligence (AI) services for the fourth consecutive time. Supported by a £3 billion investment in AI, Data, Automation, Cloud, and Cyber, we seamlessly integrate our deep AI expertise with our extensive cloud capabilities. Our UK team is part of 339K AI-fluent practitioners globally, and includes over 1,300 AI specialists and engineers, many of whom hold the necessary security clearances for public sector delivery.

Through the Deloitte AI Institute, our hub for cutting-edge research and innovation, and strategic alliances with leading hyperscalers, we empower public sector clients to optimise costs, streamline processes, and navigate their AI journey. We achieve this by leveraging our ReadyAI™ models, which provide end-to-end support for AI solution implementation, and our Trustworthy AI™ framework, ensuring responsible and ethical deployment.

Our alliances & ecosystems

To bring full value to our clients, Deloitte is a premier consulting partner with all the leading hyper-scale cloud vendors in the market including AWS, Google, Microsoft¹ and SAP. A selection of our partners and alliances are presented below:



What the analysts say

Don't just take our word for it. Deloitte is recognised by the analyst community as being **leaders in cloud transformation services**. This reflects the wealth of experience we have in delivering cloud services across the public sector and wider private sector combined with our out-of-the-box templates, tools and assets.

Gartner

Originating in 2021, Deloitte has been recognised as a Leader in this category for four years in a row. Deloitte was also positioned as a Leader in the **Gartner Magic Quadrant for Public Cloud Infrastructure Professional and Managed Services, Worldwide** in 2021, 2020 and 2019, the previous form of this category.



Gartner

Gartner: Magic Quadrant for Public Cloud IT Transformation Services. © Gartner inc. 2025

IDC

Deloitte has been awarded Leader status in the **IDC MarketScape: Worldwide Industry Cloud Professional Services 2024** Vendor Assessment. We have also been recognised as Leaders in **Hybrid IT Consulting & Integration Services** and **Software Engineering Services**.



IDC MarketScape: Worldwide Industry Cloud Professional Services Vendor Assessment © IDC inc. 2024

Cloud Transformation

Transform Faster, Transform Smarter

Deloitte's Cloud Transformation can fast-forward your journey to the Cloud, unlocking innovation, efficiency, and growth.

[Find out more here](#)

¹ As Microsoft's Independent Auditor, Deloitte cannot have a direct or material indirect business relationship with Microsoft, such as having an alliance or being a registered partner. Nonetheless, Deloitte can provide Microsoft-related technology services and invests heavily across its global business building technical skills and capabilities to develop world-class consulting and solution delivery capabilities.

2 Service Overview

Through this service Deloitte will support you to design and implement a Student Centric Higher Education organisation and CRM solution for your organisation based on Salesforce Cloud solutions tailored to Education, including the Education Data Architecture and suite of Salesforce Agentforce Education/ Education Cloud modules.

The Deloitte service can enable organisations to move to Salesforce Agentforce Education/ Education Cloud, solution (including Agentforce, Data 360 and other Salesforce products as required for your solution) quickly and cost effectively by calling upon, as required, a Deloitte leading practice template and toolkit tailored for Higher Education organisations that are ambitious and wanting to develop a leading student experience, known as 'Student Connect'. The service approach contains HESA-compliant processes and solutions for the end-to-end student experience for lead generation, international agent management, recruitment conversion and admissions, enrolment management, student enquiry management, student success and pastoral support, graduation, alumni cultivation, and student lifecycle reporting. It also contains web-enabled self-service applications for students, professional services, academics, managers and other users (e.g. Registry) using the latest Salesforce technology to take advantage of the accelerated delivery of benefits.

The Deloitte service also provides Application Management Service (AMS) for all the Salesforce cloud-based solutions provided within this service. Our full range of services would be discussed and agreed as part of the service onboarding procedure.

Our approach is student and business led. Therefore, as well as technical delivery our approach focuses on supporting organisations to be well prepared to operate under new processes to support benefits realisation and access applications through the Cloud. The approach includes robust project management, technical implementation, and change management (training and communications).

The duration of the service can vary dependent on the scale of your organisation and maturity of existing processes but typically will require 6 to 18 months for full implementation depending on the complexity of the institution and scope of the services required.

Service Features

- Student recruitment and admissions design and optimisation.
- Digital student engagement and self-service design (web, mobile, social).
- AI (including Agentic AI), Reporting and Analytics solutions delivered on salesforce products.
- Core capabilities for teaching and learning in Education Blueprint.
- Deloitte's accelerator to enhance delivery of capabilities within higher education.
- Architecture definition, vendor assessment and master data strategy.
- Integration with learning management systems. Using: MuleSoft, Boomi, Informatica, etc.
- Quality assurance and test automation support.
- Data management includes data cleansing, transformation, backup, and migration.
- Student welfare and learning analytics integration.

Service Benefits

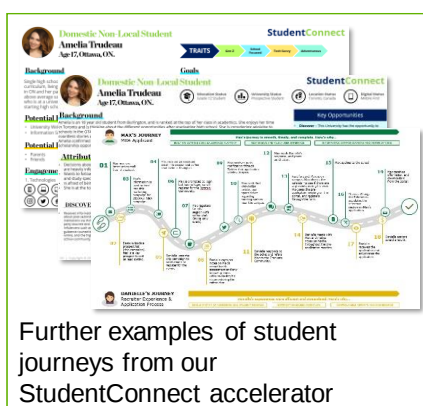
- Improved student experience, recruitment, and retention rate.
- Improved student satisfaction and engagement including NSS scores.
- Integrated business/technical expertise from Gartner's leader in CRM.
- Expertise from one of the UK's largest Education practices.
- Alignment to CRM, case management and analytics business transformation.
- 360° view of students provides a single source of truth.
- Rapid deployment of MVP solutions using proven agile methods.
- Access to Deloitte's "Tracker" tool for delivery management and governance.
- Increased regulatory compliance (HESA, OfS, CMM).
- Centralised information, reduced silos, enabling frequent and effective communication.

3 Detailed Service Description

Our approach

We start with a six-to-twelve-week rapid design phase to understand you and your student needs. This is detailed further below in the “Student centric journey and business design section. Once an implementation scope is agreed with you, we then complete implementation phases which can include business design, technical delivery and business change delivery (all specified below). Central to our approach is co-creation with your staff and where appropriate your students. We form teams that are knowledgeable and experienced in higher education and enriched with experts from other sectors that can differentiate your student experience from others in the market.

Student centric journey and business design



Our design approach is student centric.

Our service involves conducting user research with students and staff. We conduct in-depth qualitative interviews with students, and large-scale student surveys in collaboration with your Student Services, Recruitment teams and Student Union. We offer opportunities for students to be involved in the analysis, synthesis and articulation of their journeys. We create as-is and co-create target student journeys that are underpinned by a deliverable operating model covering the people, process and technology that you require to achieve the target journey. This service involves forming a group of leaders from your institution that will co-create the future joined up student journey therefore enhancing ownership of your student journey within your

institution. To transform the status quo, our service includes constructively challenge sessions that brings best in HE globally (using our Student Connect accelerators) and wider public and private examples of creating engagement recruitment and nurturing support journeys. Service deliverables include:

- Student personas
- As is and to be Student Journey Blueprint
- Target Operating Model strategy including
- High level organisational models
- State of the art workshops
- High level processes
- High level Technical Architecture
- Transformation or CRM implementation Roadmap
- Detailed first phase plan.

Business design services

Our service includes detailed process design, organisation design (or impact analysis), and people design (including business change and skills analysis). Our “University Print” process model (an industry good practice process catalogue with key process maps that are supported by Salesforce configuration based on our experience of CRM implementation in the UK and global HE market) based on the UCISA capability model, can accelerate conversations.

We tailor this to your specific needs through detailed design workshops and user groups, where we co-create designs for CRM and student facing systems. Deliverables include:

- Key performance indicator design
- Benefits design and estimation
- Change impact analysis.
- Role descriptions (and job descriptions if relevant)

- Detailed design packs including process maps
- Staff personas
- Staff journeys and wireframes

Technology delivery services

Our service includes Salesforce detailed design, development and configuration. We take the agreed business processes and student journeys and build these within Salesforce in a way that is sensitive to your legacy environment (including your Learning Management System and Student Record System). This system provides the tools for your staff to efficiently and effectively recruit and nurture your students and engage with your students through a joined-up journey that enhances their loyalty to your institution's brand. During delivery we offer opportunities for your student's to be embedded within our Delivery teams as part of the Service.

Deliverables include:

- Visual designs for screens (CRM and student facing (for example a recruitment portal))
- User story definition and design (detailed requirements)
- Detailed technical designs (e.g. interface/ integration specifications)
- Implementation of Salesforce Education Data Architecture (EDA) in a way that is compatible with UK regulators (e.g. OfS requirements and HESA data returns)
- Delivery of Salesforce systems according to our mutually agreed design (Sales Cloud/ Service Cloud/ Community Cloud/ Einstein analytics etc.)
- Data architecture
- Report design and delivery
- Delivery of changes to legacy systems (where these cannot be carried out by your staff)
- Upskilling of internal staff (both within your IT/ Digital department and within your business)

Our service can include data migration support, integration support, testing support (SIT and UAT).

Business change delivery

Our service recognises that it will be your staff (professional services and academic) that will be the most effective at delivering the personalised student journey you desire. We design and carry out effective interventions that deliver the business and cultural change required to support the transformation of your student journey. We design and deliver successful Salesforce and business training and communications that focuses on the student and business changes over and above the "point and click" training. By doing this we aim to win over institution leaders, staff and students on why and what is changing and how to get the most out of the changes for them as individuals.

Deliverables include:

- Business Change Approach (tailored to your academic year)
- Business Change and Training Plan
- Training Design
- Communication plans
- Communication delivery
- Staff consultation support
- Business change surveys.

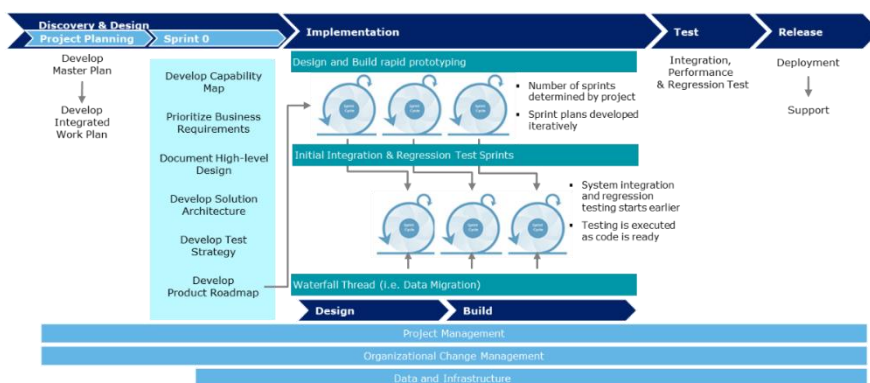
- Training Delivery Plans
- Training Delivery

Service and project management

For business transformation and technical delivery: Enterprise Value Delivery (EVD) is our comprehensive implementation method for delivering value on business transformation and technology implementation engagements. This is a method tailored to enterprise scale, customer led, Salesforce projects with complex integrations and incorporates the collective experience and industry-leading practices accumulated from effectively building and deploying hundreds of Salesforce solutions around the world.

It has been specifically configured to provide the best value out of a Salesforce implementation alongside business transformation and has been proven to work at Higher Education clients Southern New Hampshire University.

Our EVD methodology is an iterative approach emphasising flexibility, customer involvement, and delivery of prioritised functionality, and is aligned with industry standards. We will regularly engage, develop, iterate, and review designs, providing maximum transparency and openness, as well as enabling near-instant review. A sample plan for a particular phase (for example implementation of a new recruitment and admissions system) is shown below.



As a result, you will realise tangible benefits and value from our EVD methodology, ranging from pre-built templates and deliverables, incorporating project and change management activities throughout the project lifecycle, to having access to Deloitte's broader project management expertise. For example, our Deloitte Tracker application has been purpose-built to manage requirements for Salesforce, providing insight and transparency to how change is being managed. In this way, EVD will allow the project team to provide value quickly to the Group.

Managing the transformation programme and project governance structure

We understand that effective governance is critical to the success of any initiative. That's why we work closely with our higher education partners to define an appropriate and robust governance structure that meets their unique needs.

Our approach to governance allows for progress, risks, and issues to be discussed and resolved at the right level, ensuring that meetings remain relevant and appropriate for those involved. We are outcome-focused, prioritizing the establishment of the right governance and delivery portfolio to deliver the business outcomes that will build your future business.

Our comprehensive approach to governance includes program management and reporting, risk and issue management, stakeholder communication, work packages, and detailed activities. We also ensure alignment

with the overall institution strategy, ensuring that our initiatives are always working towards the greater goals of the institution. We are committed to providing effective governance that meets the unique needs of our higher education partners, ensuring that their initiatives are successful and aligned with their overall strategy.

Capability building

Our service includes advice and implementation of sustainable operating models and governance around the maintenance of the business processes and system configuration to enable you to manage the service in house (or through our AMS service). This can include advice about what a product team or centre of excellence should look like, and support in hiring the right team to maintain and continuously improve your service after we have left. This increases the cost effectiveness of our work and enables you to drive future benefits without the overhead of an ongoing delivery programme.

Our experience

Deloitte have worked with many institutions in the UK and Internationally with similar numbers of students (including international students and agents) and with ambitious growth targets including a large scale implementation of an enterprise wide CRM as part of a transformation of the end to end student experience at UK institutions including Northumbria University, and dozens of international institutions including Southern New Hampshire University.

Reference 1: Southern New Hampshire University (demonstrating Deloitte and Salesforce working together)

“An enterprise CRM strategy to handle more students and more interactions”

- Delivered marketing journey and communications capabilities to support lead generation and conversion activities
- Implemented enhanced capabilities for admissions counsellors - pipeline and communications management
- Implemented analytics and functionality to support advisers including alerts, communications and case management
- Transformed the intersection between telephone, marketing technology and CRM
- <https://www2.deloitte.com/us/en/pages/about-deloitte/articles/press-releases/deloitte-digital-wins-partner-innovation-awards.html>

Reference 2: Northumbria University: Transforming the Student Experience programme delivered:

- Design of new service points and a new online portal – Replaced legacy systems with a single CRM system and a single online student portal
- The development of coordinated, customer centric processes for student support activities – processes were redesigned in collaboration with the staff, reducing hand-offs, improving digitisation of tasks, and clarifying roles and responsibilities
- The reorganisation and distribution of student-support staff – a model for course administration and student support was developed. The teams achieved a high-quality support service by introducing a new management structure, setting clear expectations and providing training in customer service. a customer-centric culture
- <https://www2.deloitte.com/uk/en/pages/careers/articles/transforming-student-experience-northumbria-university.html>

Deloitte Accelerators

StudentConnect 2.0

Student Connect comprises:

- 1) A technology framework which accelerates the speed of delivery for key capabilities within higher education, for example, integration to student record systems.
- 2) A business framework built from years of experience within education made up of user stories, processes, and capability maps.

The framework is built on Salesforce Agentforce Education/ Education Cloud, and the wider Salesforce suite such as MuleSoft, Tableau, Marketing Cloud and Experience Cloud.

2. ReviewNow

ReviewNow is Deloitte's in-house tool built on SonarQube which accelerates code, process and quality consistency across salesforce projects adhering to stringent quality measures. It flags violations of coding best practices. It offers various versions to cater to different client needs.

3. Tracker

An agile project management and development life-cycle application. A scalable and collaborative tool for project management, design, build and testing effectiveness, and collaboration across the entire project and stakeholder team. Tracker accelerates project timelines and de-risks with a rigorous approach to agile delivery. Built around collaboration, transparency, and traceability, it enables users to have a consistent experience throughout the project lifecycle and development processes.

4 Contact Details

Please send your requirement to publicsectorbidteam@deloitte.co.uk. Alternatively, if you wish to discuss your requirements in more detail, please send us the following information and we will be happy to contact you:

- Your organisation name
- The name of this service
- Your name and contact details
- A brief description of your business situation
- Your preferred timescales for starting the work.



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