

Service Definition Document for G-Cloud 15 Services

Cloud Customer Relationship Management (CRM)
Solutions and Services (Microsoft Dynamics)

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Table of Contents

1	Service Definition for Customer Experience Management Consultancy service	3
1.1	Introduction.....	3
1.2	Overview of services	3
2	Service Description.....	5
2.1	Customer Experience Management Consultancy.....	5
2.2	Dynamics 365 (CRM) Design and Implementation.....	7
2.3	Dynamics 365 (CRM) Support	9
2.4	Dynamics 365 (CRM) Data Migration and Integration	11
2.5	Dynamics 365 (CRM) Upgrade	12
2.6	Dynamics 365 (CRM) Online Migration	14
2.7	Dynamics 365 (CRM) Diagnostic	16
2.8	Dynamics 365 (CRM) Untapped Potential	17
2.9	Dynamics 365 (CRM) Intelligent Case Management.....	18
2.10	CRM Data Cleanse and Integration	20
2.11	Intelligent Information Processing	22
2.12	Power Platform Governance and CoE	24
2.13	Dynamics AI Copilot.....	25
3	Commercial Arrangements	26
3.1	Parent Company Guarantee (PCG).....	26
3.2	Use of subcontractors and partners	26
3.3	Pricing	26
3.4	Ordering and invoicing process.....	26
3.5	Client responsibilities	27
3.6	Accreditations.....	27
4	About NTT DATA.....	28
4.1	Globally	28
4.2	In the UK	28
4.3	How we help our clients	28
4.4	Trade body membership and accreditations	29
4.5	Services.....	29
4.6	Further information	29

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1 Service Definition for Customer Experience Management Consultancy service

1.1 Introduction

This is the Service Definition Document for NTT DATA UK Ltd (NTT DATA) Customer Experience Management Consultancy service on the G-Cloud Framework. The information provided in this document is required by the G-Cloud framework and is designed to help clients determine how these services can meet their requirements.

1.2 Overview of services

Government departments are facing the issue of raising citizen and organisational expectations of government services against a background of reducing budgets. In response to these pressures and the Governments Digital Transformation strategy, departments are looking for ways of making Government services simpler, clearer and faster to use while improving efficiency and effectiveness to reduce costs. Integrated CRM platforms are a cost effective enabling technology for both external and internal ICT services which help departments do more with less and become more agile.

For many years NTT DATA have been working with a number of Government departments with their entire CRM lifecycle from business consultancy covering CRM strategy, business case development and business change to CRM delivery with CRM design, implementation, integration and ongoing support. We are proud of our reputation for quality, innovation and a “safe pair of hands” which we have built over this time. Successful projects include CRM programmes delivered to the Department for Education for correspondence management supporting over 3,000 users resulting in large improvements in efficiency, reduced handling time and adherence to process, and the NHS and Charities Commission where we have designed and implement digital transformation and case management solutions including customer self-service capabilities. The reasons for this success are the quality of our people, our proven project implementation methodologies and our culture of promoting open timely communication and creating a “one team” approach with our clients.

The following services are designed to help clients to plan and implement their cloud-based strategy. Please note that these services work in conjunction with NTT DATA's other CRM services.

- Customer Experience Management Consultancy - citizens and businesses are expecting to engage with the public sector in an equivalent way to that provided by leading brands such as Apple or Virgin. To address this need, public sector organisations need to review and enhance their entire customer engagement strategy and consider the deployment of cloud solutions, supported with appropriate processes, organisational structure, culture, behaviour, and systems.
- Dynamics 365 (CRM) Design and Implementation – working with clients to design and implement CRM solutions for relationship management, case/service/correspondence management and contact centre solutions using agile, incremental development techniques. These projects are often enablers for digital transformation programmes.
- Dynamics 365 (CRM) Support – delivers UK based remote incident resolution between 08:30 - 17:00 UK time Monday to Friday, augmented by optional 24 x 7 incident resolution for critical, priority incidents outside of normal working hours. Our award winning support desk is ITIL compliant. Support service staff are SC cleared and facilities are IL3 cleared allowing us to support secure, confidential government clients such as the existing support provided for HM Treasury.
- Dynamics 365 (CRM) Migration and Integration – CRM and Digital Transformation programmes are rarely implemented as standalone solutions. These solutions need to interface with new and legacy data sources to satisfy a customer's business requirements and implement process. NTT DATA deploy a number of integration tools which allow us to deliver integration requirements quickly and efficiently.

- Dynamics 365 (CRM) Upgrade – designed to help customers understand and quantify how much effort and cost is required to upgrade, and then implements the upgrade. This ensures
- a seamless end user experience and can cover an exploitation plan to take advantage of new core platform capabilities.
- Microsoft Dynamics 365 (CRM) Online Migration – designed to help customers to migrate, consolidate, and re-platform their CRM on premise system to Microsoft's Dynamics 365 (CRM) Online Cloud Service. This can be executed from any previous version of Dynamics (e.g. CRM 2011) going through a proven upgrade path before transferring to the Cloud Version.
- Dynamics 365 (CRM) Diagnostic – designed to help customers who have an existing Dynamics CRM installation but have problems with the solution that need to be resolved. Potential issue areas include: performance, functionality issues and faults.
- Dynamics 365 (CRM) Untapped Potential – designed to help customers to untap the potential of their existing CRM rather than continuing with a sub-par system and dealing with inefficiencies causing stress to employees and frustration to customers, not to mention higher operating costs.
- Dynamics 365 (CRM) Intelligent Case Management – to significantly improve citizen's and employee's experiences, this solution was created for organisations - including government departments, that are looking for newer, efficient and cost-effective ways to deliver services to end customers. Our end-to-end solution provides a powerful, quick to implement platform based on Microsoft Dynamics and Power Platform for customers to self-serve and raise cases, together with NTT DATA's knowledge and best practices.
- CRM Data Cleanse and Integration – designed to help customers to 'spring-clean' their data and reap the rewards from their platforms, addressing causes for the degradation of customer data their CRM systems manage and run through every day.
- Intelligent Information Processing – Through automatic identification, extraction, storing of key information from the emails/forms/documents/etc., and intelligent processing of the data, the solution - Powered by Microsoft's cutting-edge products - is designed to help customers in a wide variety of use cases, depending on their business challenge, enabling specific desired actions to be automatically executed, significantly improving citizens and employees experiences. The solution also provides reporting on analytics and trends.
- Power Platform Governance and CoE – Organisations are increasingly transforming into a cloud based business, promoting the concept of "citizen developer" to streamline the processes digitalisation, and achieve solutions to make the organisation more efficient, are relying on lowcode solutions such as Power Platform (Power Apps, Power BI, Power Automate, Power Virtual Agents, Power Pages, Dataverse) and Dynamics 365. And where high-speed digitalisation is required, it is necessary to establish a framework that combines the optimal conditions so that speed is not synonymous with lack of governance and control. NTT DATA Power Platform Governance and Centre of Excellence (CoE) framework bring the strength of Microsoft's Power Platform under complete and structured control.
- Dynamics AI Copilot - Designed to save time, boost productivity, and help users focus on their core business activities, Copilot for Microsoft Dynamics is an AI-powered assistant that enhances the productivity and efficiency of customer engagement operations.

Please see Section 2 for full service descriptions.

2 Service Description

2.1 Customer Experience Management Consultancy

2.1.1 Introduction

The UK population and businesses have an expectation of engaging with the public sector in an equivalent way to that provided by leading brands such as Apple, Amazon or Virgin Media. To address this expectation, public sector organisations need to review and enhance their entire customer engagement strategy and deploy appropriate processes, organisational structure, culture and behaviour, and supporting ICT (i.e. cloud-based solutions). This change will require a fundamental refocusing of the organisation, involving changes to people, processes and underlying technology, but will in the long term provide improved business effectiveness and efficiencies through driving process efficiency and supporting the digital by default agenda.

2.1.2 Consultancy and Business Change Services

NTT DATA offer a suite of consultancy services that review, define and implement a new Customer Management Strategy based upon the specific needs and wants of customers and the internal drivers of the public sector organisation:

- Define business objectives – the business objectives are defined in terms on Organisational Drivers, Objectives and Process impact. Initial target benefits are captured alongside constraints, timescales, and risks. The Objectives are used to drive the scope and delivery of your new customer engagement strategy.
- Map customer touch points – through mapping and defining the Customer Journey that an organisation should have, then analysing all of the customer touch points (across traditional and social channels) to maximise the experience and efficiency. Moments of truth are identified where specific interactions are key to the overall customer experience (for example registering for digital services) – this allows focus on these touch points to ensure user adoption. Key owners within the organisation are identified for each customer touch point together with actions and desired outcomes. This is an input into the Desired Customer Experience.
- Map desired customer experience – the desired customer experience is mapped across the customer journey and across the different touch points. An analysis of the impact of each touch point is completed (focusing on the Moments of Truth) and ranking assigned for the importance of each touch point. These are used to prioritise improvement programmes.
- Define the high-level customer facing processes – the customer facing processes are documented covering customer actions, organisation actions and automated (system) actions. Target (To-Be) processes are derived from either i) As-Is processes, ii) optimal new innovative concepts iii) combination including customer experience drivers.
- Desired to actual customer experience mapping - a gap analysis is performed between the desired and current customer experience - this is used to identify and prioritise the improvement roadmap going forward.
- Map customer facing processes to IT systems – an analysis of IT Systems is carried out to identify where these can be further exploited, where they need to be replaced with cloud-based approaches and where improved integration can deliver the key benefits. The results of this analysis will feed into a systems improvement/cloud adoption programme.
- New operating model – the To-Be operating model is defined covering organisational impact and a business change programme to ensure internal user buy in.
- Gap analysis and programme prioritisation - a gap analysis is completed and SWOT/Cost Benefit Analysis used to prioritise the IT and Business change programme focusing on a combination of quick wins and longer term strategic initiatives. A roadmap for change is produced providing a structure for future projects to ensure ongoing benefit accrual.
- Capture business requirements, benefits, risks and KPI - in parallel with the above activities business requirements, typically documented as User Stories, (functional, non-functional, data, etc.) will be gathered along with benefits, new KPI and programme risks.

- Build business cases for change – to develop a cost benefit analysis and KPI to prove and measure the business benefit of change.

The above offerings are typically combined together based on the specific needs of the client with some or all of the steps being delivered.

2.1.3 Implementation and Adoption Services

These include:

- Product selection - advising you on the Customer Experience Management platform (potentially covering CRM, Marketing Automation, Channel Automation and Digital Services) and cloud-based approach that best fits your business requirements.
- BI strategy and product selection - integrating to the customer management strategy and ensuring the right metrics are in place for business improvement.
- AI strategy – advising you on the opportunities for your business in AI, including Generative AI solutions such as Copilot and identifying use cases where AI can deliver tangible business value whilst also ensuring security, ethics and governance.
- Integration strategy - advising on how best to provide a seamless customer experience across multiple cloud and legacy IT systems.
- CRM system implementation and roll out - including configuration, integration and user training and adoption utilising a proven agile delivery methodology.
- Transition planning and delivery – within public sector organisations, managing a successful change to ways of working involving people, process and technology is a key factor in the ROI of a project. Through support, guidance and leadership of our Business Change team, we will plan, detail and deliver the strategy that will ensure employee adoption and ownership of new ways of working, systems and culture through:
 - NTT DATA's unique business change processes (refer to the NTT DATA Business Change Service)
 - Change Strategy Planning
 - Stakeholder Management
 - Communications Planning
 - Project Management
 - Knowledge transfer
 - Quality assessments (Customer, Staff and Process)
 - Change Risk register and mitigations
 - Deployment management
 - Delivering and integrated approach technology deployment and user adoption

2.2 Dynamics 365 (CRM) Design and Implementation

2.2.1 Introduction

Dynamics 365 CRM is a platform which tracks relationships and interactions with citizens, contacts and organisations to improve services and increase efficiency. Using out of the box case management and workflow features these relationships and interactions can trigger automated business process to increase efficiency and process compliance. Using powerful management reporting features users, team leaders and managers understand workloads and relationship data to make informed and better decisions.

Excellent integration capabilities ensure that Dynamics CRM solutions do not need to work in a silo and can be easily integrated to document management solutions, email systems, legacy line of business systems and data warehouses so that information and business processes can work across multiple applications without the need for re-keying, guaranteeing data accuracy and enabling organisations get the most of the information it is gathering.

Dynamics CRM user adoption is also high due to its intuitive user interface and Learning Paths, a contextually-rich training tool, which allows new users to quickly become productive. Organisations can choose to deploy Dynamics 365 CRM in many ways including the browser client, within Microsoft Outlook, on mobile devices such as mobile phones and tablets or to citizens and partners via community portals. Leading IT industry analyst Gartner believe these integration capabilities and along with Dynamics 365 CRM platform features make Dynamics 365 the best CRM solution within government for enabling Digital Transformation.

Dynamics CRM is augmented with AI Copilot, which leverages Generative AI capabilities to increase automation and efficiency or processing. Copilot features include, for example, the ability to automatically summarise large cases and generate proposed correspondence to customers which can then be reviewed and refined by the user – accelerating their work and enabling them to focus on higher value activities.

2.2.2 Scope of Service

Dynamics 365 CRM contains many features and is highly configurable to meet an individual organisation's needs. With this versatility comes the risk of poor design and implementation so selecting the correct partner is very important. As a Microsoft Global Systems Integration with top highest level of Solution Designation across the Microsoft Cloud NTT DATA has many years' experience of designing and implementing Dynamics CRM solutions into government departments and has been working with Dynamics 365 since the UK's first release in 2003. This experience of the platform and working in government ensures high quality in design and delivery on our projects. We understand the importance of working closely with our clients in a "one team" approach and as a true partner, ensuring solutions implemented are cost effective and focused on meeting business objectives. Our starting point and preference on projects is to use configuration (core product features) over customisations as this is the most cost effective solution for our clients both in the initial development and on-going support and maintenance. The configuration approach takes advantage of the extended Microsoft eco system exploiting wider capabilities from Power Platform, Azure Services Logic Apps and Microsoft 365 integrations with Office and Teams.

Specific Design and Implementation services include:

- Business requirements to solution mapping
- Core Dynamics configuration and customisation– utilising out of the box features to minimise development and ensure fast deployment and return on investment
- Portal configuration and customisation
- Integration to other systems (e.g. Web sites, back office systems etc.) utilising integration platforms, Logic Apps, ETL tools and point to point solutions

- Exploitation of the extended Microsoft eco system to incorporate process support and approvals through Power Automate, Outlook integration through the Outlook App and SharePoint integration for effective document management
- Test support and automation
- User training and business change consultancy
- On-going support and hyper care services

2.2.3 Approach

Over many years we have developed a number of CRM specific implementation methodologies ranging from traditional waterfall to iterative and agile which are aligned to Microsoft Success by Design. We work with our clients to select the most appropriate methodology for their organisation and project (often a mix of Agile for core development and Waterfall for interfaces). Using these methodologies, we prefer that our clients work closely with the development teams to obtain early visibility of the solutions being built so that clients have input into the development lifecycle. This approach saves time and money resulting in enriched project success and higher user adaption.

Our project managers are PRINCE, Scrum Master, and Microsoft Fast Track certified and experienced in delivering CRM projects. Our projects are delivered using UK based Microsoft Dynamics CRM certified consultants and developers.

NTT DATA uses an Application Lifecycle management (ALM) framework for delivering projects which allow us to track business requirements/user stories end to end through configuration/development, unit test, integration test, user acceptance testing, deployment and ongoing maintenance and enhancements.

Our combination of culture, quality, delivery process and technical expertise ensure our projects are delivered to time, cost and budget and with very high client satisfaction.

2.3 Dynamics 365 (CRM) Support

2.3.1 Introduction

This service works in conjunction with NTT DATA's other CRM services, including its Lot 2 software-as-a-service propositions.

NTT DATA offer a Microsoft Dynamics Service which delivers remote incident resolution between 08:30 and 17:00 UK Time Mon to Fri, augmented by optional 24 x 7 incident resolution for critical, priority incidents outside normal working hours.

NTT DATA's support service provides a single point of contact for incident management. All calls logged with NTT DATA's Service Desk will be resolved directly by Service Desk specialists, who are Dynamics CRM certified, or allocated to a 3rd line Microsoft Dynamics specialist consultant. As a Microsoft Dynamics Gold partner, we have a Dynamics support agreement in place with Microsoft and have an assigned Microsoft support account manager (SAM) so that if issues arise with the platform we have a direct escalation route to Microsoft support teams. Support can be provided not just for the core Dynamics components but for the extended solution including integration points, infrastructure and potentially additional third party/legacy systems.

Ownership of all Incidents remains with the NTT DATA Service Desk until resolution. High priority issues are automatically escalated to an NTT DATA ITIL qualified Service Delivery Manager to ensure issues are actively managed through to resolution.

The Service Delivery Manager, supported by the Director of Service Delivery, is able to call on all levels of resources within NTT DATA, its partners and vendors to ensure a timely resolution to support related issues or queries. The Service Management team works continually with clients to review the levels of service being delivered and actively practice Continual Service Improvement.

Our award-winning support desk is ITIL compliant. Support service staff are SC cleared and facilities are IL3 cleared allowing us to support secure, confidential government clients such as the existing support provided for HM Treasury.

2.3.2 Scope of the Service

NTT DATA offers full ISO 20000:2011 support services for Microsoft Dynamics from our Service Desk in Birmingham. The Service Desk operates with full ITIL management practices and offers a seamless, competitive, high quality support service with:

- Experienced ITIL v2 and v3 certified Service Managers.
- Microsoft Dynamics certified Service Desk analysts and consultants.
- A culture of long-term relationships with clients, built on integrity and trust. Our commitment to excellence and customer satisfaction ensures renewal of support agreements year-on-year.
- Continuous ISO20000 certification for IT Service Management since introduction of the standard.
- Incident management through a central audited Service Desk system which provides accurate measurement of SLAs and KPIs, reported on for the client at regular intervals. This includes a customer self-service portal to log, track and collaborate on incidents.
- High priority Incident escalation procedures.
- Robust, proven and audited Problem Management and Major Incident processes to ensure full management of issues impacting our client's business.

2.3.3 Service Options

Available support options include:

- Application support hours - flexible / customer-specific up to 7 x 24 hours.
- Dedicated Service Desk staff, if required.
- Application support packages - incident packages in multiples of 10; unlimited incident package; cost per month.
- Technical application support packages - Level 1 + Level 2 + Level 3; Level 2 + Level 3; Level 3; dedicated technical resource.

NTT DATA work with our clients to create bespoke support agreements specific to their needs. Support agreements can be simple call off contracts to fully managed services.

2.4 Dynamics 365 (CRM) Data Migration and Integration

2.4.1 Introduction

Data migration and integration can often be the most challenging part of any project. NTT DATA has extensive experience of designing, developing, and deploying data integration and data migration solutions for Microsoft Dynamics cloud applications. A sub team within our CRM practice is dedicated to implementing data migration and integration deliverables. The knowledge and experience of this team removes the risks associated with data migration and integration within projects.

Our approach is to work closely with the customer to understand their specific integration requirements. We then propose an integration solution that is the best fit to those requirements. NTT DATA has a wide and in-depth experience of integrating Microsoft Dynamics with a host of other applications including other Microsoft products and client legacy systems.

2.4.2 Integration Options

We understand that integration can often be achieved in several different ways; however, we seek the best solution for the customer, given the constraints of the integrated data sources or applications. Typically, a solution is based on one or more of the following data migration/integration technologies:

- Web service APIs
- Message queue-based processing
- Secure text file transfer (.csv or .xml)
- Direct database connectivity (on source systems)
- Azure Service Bus or Logic Apps integration service/framework
- Azure Data Factory
- Tibco Scribe Insight integration platform
- Mulesoft Anypoint enterprise integration platform

In some instances, staging databases may also be deployed to support data cleanse and transformation activities.

Typical integration solutions we have deployed may incorporate complex real-time, high-volume transaction processing, scheduled batch processing, and event file initiation. For initial data migration, data loads comprising millions of records have also been supported with many of our customers.

In support of this, NTT DATA is a Microsoft CRM Gold partner and Scribe Elite partner; consequently, our integration team is trained and certified in leading integration products for Microsoft, Scribe Software and MuleSoft.

2.4.3 Approach

When designing integrations NTT DATA hold workshops with all relevant parties to gain a low level understanding of business and technical requirements of the integration and to jointly agree the best approach and integration strategy. The output from the workshop is an “Interface Contract” which contains all the information required by all parties to implement the integration. Once formally agreed this “Interface Contract” then forms the specification for interface build and testing by all parties involved in delivering the integration. This formal approach ensures that all parties have a common understanding of what is required by each endpoint of the integration and therefore removes the risk of misunderstanding between delivery teams.

2.5 Dynamics 365 (CRM) Upgrade

2.5.1 Introduction

NTT DATA has extensive experience implementing Microsoft Dynamics CRM on every version from Dynamics CRM 1.2 released in 2003 through to the current version of Dynamics 365 released in 2019. We have upgraded, migrated, transitioned, re-platformed and consolidated systems on every CRM version, giving us a deep understanding of the migration issues and an established and proven approach.

NTT DATA recognises that without understanding the key processes and issues with the existing system it is impossible for a customer to identify the key benefits of moving to the new cloud version and which features would add value to the solution. This gives a holistic approach for addressing both business and technical challenges.

This service also helps customers understand and quantify how much effort and cost is required to upgrade their existing Dynamics CRM system and which upgrade method is most suitable for their environment.

2.5.2 Scope of Service

Upgrade services provided include:

- Impact assessment and business case development for upgrade
- Upgrade to the latest version of Dynamics 365 from previous versions
- On premise to Cloud migration
- Management of the Microsoft release process including:
 - Testing of new release in test/sandbox
 - Any code rectification
 - New feature analysis and exploitation
 - Deployment support into live

2.5.3 Approach

The project will consist of a number of phases with defined deliverables as follows.

a) Project Kick-off

Agree project scope, roles and responsibilities; agree initial risk register and mitigations; introduce the team members to each other; agree governance structure for project; produce detailed project plan. Produce Project Initiation Document.

b) Analysis

Information gathering covering: obtain a high level understanding of the current solution; obtain a high level understanding of the existing infrastructure supporting the solution; understand any functional issue or concerns with the solution; identify any third party products being used within the solution; obtain a copy of the test system.

Evaluate upgrade options and determine key risks, technical and business impacts; document upgrade options in terms of cost, time and business/technical benefits to the client; present options to the client.

Evaluate the existing implementation and produce recommendations on the upgrade covering:

- New capabilities in CRM 365 and how they could be exploited by the client.
- Identify any code in the solution which is no longer supported and needs to be replaced.
- Assessment of the infrastructure supporting the existing solution.
- Identify any quick wins that could be implemented as part of the upgrade project.

c) Development/Test Upgrades and Solution Build

- Deploy NTT DATA Sandbox.
- On the Sandbox server, upgrade the existing CRM system to the current version.
- Identify and resolve any issues following the upgrade.
- Upgrade any unsupported plug-in code.
- Upgrade any JavaScript code to use the new API.
- Make changes to support new features (such as the latest Unified Interface or to take advantage of the new Marketing capabilities)
- System testing of the solution.

d) Training and Solution User Test

Ensure the upgraded Dynamics CRM solution is working correctly by carrying out the following:

- Provision a second CRM test system instance (a copy of the production system).
- Import any fixes that have been developed and/or introduced.
- Train staff that will be carrying out user acceptance testing in the new interface.
- Train CRM System Administrators.
- Support the customer while user acceptance testing is being performed.

e) Production System Upgrade and Solution Deployment

- Produce the implementation plan.
- Create/update the solution “Run Book”.
- Upgrade Dynamics CRM production instance.
- Upgrade/deploy any required 3rd party products (on-premise and/or online).
- Import changes from the test activities.
- Provide post-upgrade support.

2.6 Dynamics 365 (CRM) Online Migration

2.6.1 Introduction

NTT DATA has extensive experience implementing Microsoft Dynamics CRM from version 1.2 through to the current version. We have migrated many Dynamics CRM systems to the cloud and gained a thorough understanding of the migration issues and have developed a proven approach.

NTT DATA recognises that without understanding the key processes and issues with the existing system it is impossible for a customer to identify the key benefits of moving to the new cloud version and which features would add value to the solution. This gives a holistic approach for addressing both business, user experience and technical challenges.

2.6.2 Upgrade Method

The method for upgrading Dynamics CRM On-Premise to Dynamics CRM 365 Online is dependent on the version of CRM that is currently in use. The method to upgrade requires upgrading the existing onpremise solution to Dynamics CRM 365 v9 prior to migrating/importing to CRM 365 Online. Data will need to be migrated from on premise to online as part of the process. NTT DATA using tooling including Scribe, Kingswaysoft and Azure Data Factory to migrate data from on premise to. This allows migration scripts to be created quickly and cost effectively.

2.6.3 Approach

The project will consist of a number of phases with defined deliverables as follows.

a) Project Kick-off and Detailed Planning:

Agree project scope, roles and responsibilities; agree initial risk register and mitigations; introduce the team members to each other; agree governance structure for project; produce detailed project plan. Produce Project Initiation Document. The NTT DATA project management services are provided as agreed with each client and will work with the client's own project managers as needed.

b) Analysis:

The goal of this phase is to evaluate the existing implementation and produce recommendations on the migration to Dynamics CRM Online covering:

- New capabilities in Dynamics 365 and how they could be exploited by the client.
- Identify any quick wins that could be implemented as part of the migration project.

c) Development/Test Upgrades and Solution Build:

- Deploy NTT DATA development server.
- On the development server, upgrade the existing CRM system to the current version.
- Identify and resolve any issues following the upgrade.
- Upgrade any plug-in code that was created prior to Dynamics CRM v4.0.
- Upgrade all JavaScript code to use the new API.
- Repoint any integration points to interface to the on-line instance rather than the on premise (resolving any connectivity issues)
- Redevelop any reports that make direct database calls to use the fetch XML interface ☐
- Develop and test scripts to migrate data from on premise to onto the online instance ☐
- System testing of the solution.

d) Training and Solution User Acceptance Test:

Ensure the upgraded Dynamics CRM Online solution is working correctly by carrying out the following:

- Provision a second CRM Online test system instance.
- Import any fixes that have been developed and/or introduced.
- Run migration scripts to populate from on-line.
- Deploy updated integration code.
- Deploy changed reports.
- Train staff that will be carrying out user acceptance testing in the new interface.
- Train CRM System Administrators.
- Support the customer while user acceptance testing is being performed.

e) Production System Upgrade and Solution Deployment:

- Produce the implementation plan.
- Create/update the solution "Run Book".
- Deploy a CRM Online production instance.
- Perform data migration.
- Deploy new integration code.
- Deploy changed reports.
- Provide post-upgrade support.

2.7 Dynamics 365 (CRM) Diagnostic

2.7.1 Introduction

Please note that this service works in conjunction with NTT DATA's other CRM services including its Lot 2 software-as-a-service propositions.

The Microsoft Dynamics Diagnostics service is designed to help customers who have an existing Dynamics CRM installation, but have problems with the solution that needs to be resolved. For example:

- Performance issues - the solution is running slow and affecting the productivity of staff.
- Functionality issues - due to changes in business processes or issues with the initial project design, the Dynamics CRM solution does not meet the current business need, resulting in inefficiencies, user adaption and lack of return on investment.
- Faults - parts of the solution do not work correctly or as planned.
- The aim of the Dynamics CRM Diagnostic service is to identify the root cause of identified issues within a small, fixed price assessment. Using the resulting recommendations, the business can decide whether any investments to resolve the issue can be justified.

2.7.2 Scope of Service

The scope of the diagnostic services covers one or more of:

- Business process fit analysis – looking at how the solution matches current business requirements
- Technical analysis – looking at implementation approach and potential improvements
- Performance analysis – looking at potential bottlenecks and solutions
- Platform exploitation analysis – looking a new base platform capabilities that can replace custom development (e.g. around events, surveys, marketing integration)

2.7.3 Approach

The Dynamics CRM Health Check service consists of three phases: a) Information Gathering, b) Investigation and c) Recommendations. The actual work undertaken in each phase will vary depending upon the issue being investigated. However, the list below provides the typical activities performed at each phase.

a) Information Gathering

- Obtain detailed understanding of the issue.
- Network latency analysis.
- Perform a general review of the CRM system to gain an understanding of its configuration and customisations.
- Enable Dynamics CRM Platform tracing.
- Workshops to understand functional requirements.

b) Investigation

- Review Microsoft Partner Knowledge Base and other sources for any known issues of this type.
- Review solution design against business requirements.
- Analyse customisations and code.

c) Recommendations

The findings and recommendations are documented and presented to the customer. If NTT DATA's professional services are required to resolve the issue, the project timeframe, necessary resources, and a phased project costing will be provided.

2.8 Dynamics 365 (CRM) Untapped Potential

2.8.1 Introduction

Not all CRMs are created equal. Managing customer data is crucial for today's businesses. But what if your CRM system is underperforming?

The reasons why your CRM may not be operating as well as it should be, could be related to causes such as:

- Poorly scoped or delivered
- Lack of technical expertise in delivery partners
- Functional limitations
- Unused CRM capabilities
- System performance/faults
- Unaligned or unadopted business processes
- Poor adoption through gaps in training and / or business change

Not every implementation of a customer data system delivers a 'good CRM'. But when something is wrong, we'll put it right.

2.8.2 Scope of Service

The scope of the Untapped Potential services is designed to help customers to untap the potential of their existing CRM rather than continuing with a sub-par system and dealing with inefficiencies causing stress to employees and frustration to customers, not to mention higher operating costs.

2.8.3 Approach

The Dynamics 365 (CRM) Untapped Potential service engagement approach is flexible to meet the client's individual needs and preferences, focusing on:

- Business need
- Delivered on time
- Collaborative engagement
- Quality never compromised
- Built incrementally from firm foundations
- Developed iteratively
- Communicated continuously and clearly

Our Customer Relationship Management specialists guide our clients through the process for getting their CRM to work as it should for them. The steps we'll go through:

- **Back to basics** – We look at our client's business, the challenges they face, and why their CRM hasn't overcome them.
- **A clear plan** – We prepare a clear plan for success, drawing on our extensive experience as a Gold Partner specialising in Microsoft D365 Customer Engagement.
- **Delivering 'the good stuff'** – We implement the changes so our clients can put their problems behind them – and get the benefits they've been waiting for.

Clients place their trust in us to help solving their business problems. As well as our skills and experience, we use a transparent approach that clarifies the client's knowledge of the solution and its challenges. We use a business-benefit consultancy led method, to ensure real business value is delivered. Our methodology focuses on improving ways of working, from strategy to execution.

2.9 Dynamics 365 (CRM) Intelligent Case Management

2.9.1 Introduction

With customer expectations at an all-time high, organisations need to meet increasing demand for improved user experience while promoting better employee engagement, providing efficiency gains and reducing costs of operations.

NTT DATA's Intelligent Case Management service significantly improves citizen's and employee's experiences, as was created for organisations, including government departments, that are looking for newer, efficient and cost-effective ways to deliver services to end customers.

Through NTT DATA's Intelligent Case Management solution, we help clients by delivering them a Case Management solution that provides a powerful, quick to implement platform based on Microsoft's Dynamics 365 Customer Service, combined with Copilot Studio and Power Pages for customers to self-serve and raise cases, and Microsoft Power BI to provide real insights into the data.

NTT DATA's Intelligent Case Management platform is an end-to-end solution that combines the best of Microsoft's Dynamics 365 and Power Platform with NTT DATA's knowledge and best practices to help clients to more efficiently manage end to end case management and other associated tasks, and can be integrated with client's ecosystems with minimal changes.

2.9.2 Scope of Service

Leveraging NTT DATA's extensive public sector experience together with in-depth knowledge of

Microsoft's Dynamics 365 and Power Platform, the solution provides an enhanced, ready-to-use case management framework, helping clients to rapidly launch the required capabilities, including enablement of automated workflows organisational processes.

NTT DATA specialists guide our clients through the process for enabling our Intelligent Case Management solution, allowing our clients to realise the full potential of the solution, including:

- Improve the service quality and help enhance user experience,
- Provide an intuitive user interface to enable users to easily search for and select services,
- Creation of business intelligence dashboards to allow clients to gain insights into customer and case data.
- For end-customers who want to self-serve, the fully integrated Power Portal enables independent problem resolution and reporting, including real-time updates to keep customers informed.

2.9.3 Approach

The Intelligent Case Management service engagement approach is flexible to meet the client's individual needs and preferences, focusing on:

- Business need
- Delivers extended configuration options, to support self-management
- Delivered on time
- Collaborative engagement
- Quality never compromised
- Built incrementally from firm foundations
- Developed iteratively
- Communicated continuously and clearly

Our method uses Agile principles to identify requirements and define an implementable, scalable solution.

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2.10 CRM Data Cleanse and Integration

2.10.1 Introduction

One third of customer data will be incorrect within a year.

Marketing experts say that more than 30% of business's data will become outdated, invalid or inaccurate within a year.

For a CRM system, this is tantamount to wading through treacle. Customers change their contact information; B2B contacts change companies, get promoted, relocated or change roles; and target customer profiles become outdated (when more available information is available, but not utilised).

To be GDPR compliant, it's critical that companies understand what customer data they hold, where they hold it, and what processes affect that data.

Today's customers assume that service providers know who they are – a level of personalisation that's now expected best practice. So if a CRM system is letting organisations down, the customer experience is damaged by their customers having to repeat information when they contact the organisation.

For organisations who are not using the latest data on consumer behaviour, the effectiveness of marketing campaigns suffers too.

For employees, poorly-managed data can mean extra time and effort dealing with disjointed systems and gathering customer information from multiple applications.

The strategies, and ultimately the experiences, designed by the client's teams, rely on the data in their CRM. Whether these are successful in delighting their customers is heavily dependent on the quality of the data.

2.10.2 Scope of Service

With the high volume of data that CRM systems manage and run through every day, updating and modifying data frequently will leave room for error. This is especially true if there is no single point of entry for data modification.

Our Data Cleanse and Integration service prevents inaccuracies that would otherwise cost client's organisation valuable time and money, by following the principles of quality-assess, cleanse and integrate.

We provide our client's data the TLC it needs. Good quality data provides access to more information about the prospects listed in client's CRM system, allowing clients to tailor the strategies they use with significantly greater accuracy, maximising the chance of success and return on investment.

Here are some of the key benefits Data Cleanse and Integration service provides to clients:

- Improved sales performance
- Better customer relationships
- Avoid regulatory penalties due to non-compliance
- Reduction of errors
- Increased efficiency
- Effective and advanced decision making
- Boosting and protection of ROI
- Better customer Satisfaction

2.10.3 Approach

Our Data Cleanse and Integration service solves data problems.

Before we work on cleaning the data, we use our proven methodology to assess the quality of the client's data across their technology landscape, checking for:

- Completeness - how complete data in a system is, taking into account the context;
- Consistency - the consistency of data format (whether it looks like the type of data it should be, such as plain text or numbers);
- Correctness - whether the data in the system is accurate.

Our method uses agile principles to identify requirements and define an implementable, scalable solution.

We delivered data cleanse and integration solutions for many clients across multiple industries, providing us with a sound base of knowledge and experience.

As well as helping companies to meet the demands of the GDPR legislation, we make client's data work for them again by breaking down silos to integrate their data.

2.11 Intelligent Information Processing

2.11.1 Introduction

We're moving faster than our information can keep up. Delays processing data and not having data at hand harm our decision making:

- Data is decentralised and captured multiple times
- Huge time loss performing repeatable tasks
- Human error from data capturing
- Delays caused from not having data at hand
- Decision making impaired from no or incorrect rolled up data

Through our Intelligent Information Processing solution, we help clients to realise creative collaboration between human and machines for automatic data processing. The alternative – continuing with sub-par system and processes – is dealing with inefficiencies, causing stress to employees and frustration to customers, not to mention higher operating costs.

NTT DATA's Intelligent Information Processing significantly improves citizen's and employee's experiences.

2.11.2 Scope of Service

Through automatic identification, extraction, storing of key information from the emails/ forms/ documents/ etc., and intelligent processing of the data, the service is designed to help customers in a wide variety of use cases, depending on their business challenge, enabling specific desired actions to be automatically executed, significantly improving citizen's and employees experiences. The solution also provides reporting on analytics and trends.

Our service, powered by Microsoft's cutting-edge products, uses AI to drive digital transformation with accelerators, solutions, and practices that empower organisations. Our tailored solution uses the following Microsoft components:

- Power Automate to build the intelligent flows
- Form Recogniser to extract and analyse data
- Power BI to get insights and show trends

Our specialists guide our clients through the process for enabling AI for the client's data to allow them to realise its full potential, including:

- Rapid speed of data processing
- Time redirects to value-adding activities
- Improved decision making
- Improved employee motivation
- Reduction in data capture errors
- Reduced OPEX

2.11.3 Approach

The Intelligent Information Processing service engagement approach is flexible to meet the client's individual needs and preferences, focusing on:

- Business need
- Delivered on time
- Collaborative engagement
- Quality never compromised
- Built incrementally from firm foundations
- Developed iteratively
- Communicated continuously and clearly

Our method uses agile principles to identify requirements and define an implementable, scalable solution.

Clients place their trust in us to help solving their business problems. As well as our skills and experience, we use a transparent approach that clarifies the client's knowledge of the solution and its challenges. We use a business-benefit consultancy led method, to ensure real business value is delivered. Our methodology focuses on improving ways of working, from strategy to execution.

2.12 Power Platform Governance and CoE

2.12.1 Introduction

Organisations are increasingly transforming into a cloud-based business. They are promoting the concept of “citizen developer” to streamline the processes digitalisation, and achieve solutions to make the organisation more efficient. They are relying on low-code solutions such as Power Platform (Power Apps, Power BI, Power Automate, Copilot Studio, Dataverse) and Dynamics 365.

And where high-speed digitalisation is required, it is necessary to establish a framework that combines the optimal conditions so that speed is not synonymous with lack of governance and control.

NTT DATA Power Platform Governance and Centre of Excellence (CoE) framework brings the strength of Microsoft’s Power Platform under complete and structured control.

2.12.2 Scope of Service

Our offering establishes a balanced tandem between the agile development and the process digitalisation needs, provides adequate security measures for handling data, gathers tools and information available for those involved, and has the monitoring and control measures to meet implementation standards.

2.12.3 Approach

The Power Platform Governance and CoE service engagement approach is flexible to meet the client’s individual needs and preferences, focusing on:

- Discovery - When we learn about the current state and maturity level of the practice of Power Platform at the client.
- Implementation - Based on Discovery information, establish the technical baseline for the Governance Model (e.g., environment, security, data protection policies) to improve current situation.
- Evolution - Cyclical stage when Governance Model is applied and continuous improvement is sought by promoting the established Best Practices (e.g., stable, secured and monitored basis with implementation of automation for agile life cycle).
- Evolution into Centre of Excellence - Once Governance is established, launch of CoE enables all areas in the organisation to work consistently and align around business objectives rather than individual metrics, while creating a positive effect on adoption and ease of administration.

The CoE, on an ongoing basis, will remain the function to support business areas ensuring correct definition of new processes or digitalisation under the Power Platform, exposes capabilities and benefits for each area, delivers continuous improvements in the governance model based projects’ experiences, ensures use of appropriate architecture aligned with company strategy, knowledge-shares success’ stories including Best Practices applied.

2.13 Dynamics AI Copilot

2.13.1 Introduction

Copilot for Microsoft Dynamics is an AI-powered assistant that enhances the productivity and efficiency of customer engagement operations. It's designed to save time, boost productivity, and help users focus on their core business activities.

For Customer Service operations it assists agents by drafting contextual answers to queries, summarising cases and conversations, composing emails and providing chat responses.

For Sales operations it assists agents by summarising opportunities and leads, preparing for meetings and keeping up with account related updates.

2.13.2 Scope of Service

Our offering provides a deep understanding of the Generative AI capabilities of Copilot within Microsoft Dynamics before then contextualising this to the specific client's business processes.

Customers gain a thorough understanding of how Copilot for Sales and Service can help improve business outcomes.

NTT DATA will assess your organisation's processes, demonstrate use cases and scenarios, and provide customized, actionable recommendations you can follow.

2.13.3 Approach

We employ our tailored version of the Microsoft Catalyst design thinking approach, comprising a series of workshops:

- **Envision workshop:** We demonstrate the Generative AI capabilities of Copilot in Dynamics 365 to stimulate an understanding and excitement around the art of the possible. We then use design thinking techniques to identify and prioritise use cases aligned to benefit dimensions such as cost reduction, customer and employee experience improvement and revenue increase.
- **Business value assessment:** For the prioritised Copilot AI use cases we identify the enablers and benefits measures.
- **Solution assessment:** We identify the customer journeys and business processes which will be transformed by Copilot AI in Dynamics 365, assess the change in business process and technical change required and produce a high level roadmap for delivering the change.

Through this design thinking process we enable our customers to gain a deep understanding of the art of the possible with Copilot in Dynamics, how it can be specifically applied to their business processes and clear actionable recommendations and identified benefits.

3 Commercial Arrangements

3.1 Parent Company Guarantee (PCG)

Please note that NTT DATA is not able to provide a Parent Company Guarantee (PCG).

3.2 Use of subcontractors and partners

These services are delivered by NTT DATA with support from selected, specialist partners only where required, and with approval from the client in advance.

3.3 Pricing

Please see the Digital Marketplace for the NTT DATA Pricing associated with these services.

3.4 Ordering and invoicing process

Clients will be expected to follow the G-Cloud 15 ordering process as outlined in the Framework's Terms and Conditions. This will ensure that the scope, timeline, and technical requirements are understood, agreed and can be delivered.

Each assignment will then require a formal work order to be raised, which would define:

- The name and contact details of the consumer's representative
- The objective(s) of the work and the Key Performance Indicators
- The amount and type of resource required (number of roles and duration)
- Start and end dates for the project
- The scope and requirements for the project
- The specific technical or business knowledge required by NTT DATA
- Advise whether the project is expected to be carried out on the consumer's premises (in which case location is required), or at NTT DATA's premises
- Expected deliverables, quality levels and acceptance criteria for sign-off

Upon receipt of a work order, NTT DATA will evaluate the requirement and confirm a start date. Once NTT DATA accepts a work order, we will commence work upon receipt of a purchase order.

NTT DATA will operate the following invoicing process:

- For time and material projects and assignments - monthly invoices will be issued in arrears for payment within 30 days
- For fixed price projects and assignments - invoices will be based upon agreed staged payments associated with formal client sign-off of interim or final deliverables. Invoices are issued in arrears for payment within 30 days
- For managed services - Transition Charges based on milestones, with Managed Services Charges invoiced quarterly in advance

3.5 Client responsibilities

The client will provide a Project Manager responsible for the following activities:

- Ensure the organisation is aware that external support is being provided by NTT DATA and that staff and teams are clear about the project, its scope and their roles and responsibilities in it.
- Manage the client personnel and responsibilities for this project.
- Serve as the interface between NTT DATA and all the client's departments participating in the project.
- Administer the Change Control Procedure with the NTT DATA Project Manager.
- Participate in project status meetings.
- Obtain and provide information, data, and decisions within three working days of NTT DATA's request unless a different response time is agreed in writing.
- Review and approve the Milestone achievements.
- Help resolve any project issues and the client deviations from the estimated schedule, and escalate issues within the client organisation, as necessary.
- Provide staff as required to undertake the User Acceptance Testing.
- Ensure client staff are made available for any meetings, interviews, document review and presentations within the proposed timescale.
- Provide client staff able to deliver authoritative answers to questions and clarification requests in a timely manner.
- Provide NTT DATA personnel with suitable office space, other accommodation and facilities that personnel may reasonably require to perform the services required during the project.

3.6 Accreditations

For these services, NTT DATA has corporate membership of the ITSMF, SDI and MCA trade bodies and holds a number of relevant accreditations including:

- ISO 9001 Quality Assurance
- ISO 14001 Environmental Management
- ISO 27001 Information Security Management
- PRINCE2 Practitioner Project Managers
- ISO 20000-1 IT Service Management
- ISO 22301 Business Continuity
- ISO 45001 Health and Safety Management Systems
- Cyber Essentials
- Cyber Essentials+

4 About NTT DATA

4.1 Globally

NTT DATA Corporation is a global IT innovator delivering technology-enabled services and solutions to clients around the world and is a top tier global IT Services provider (reference: Gartner). It employs more than 190,000 people across 70 countries.

For more than 50 years, the NTT DATA Corporation has been successfully providing IT services to a wide range of clients in the automotive, electronics and high technology, energy and utilities, financial services, healthcare and life sciences, insurance, manufacturing, media and entertainment, professional services, public, retail, telecommunications and transportation and logistics sectors.

NTT DATA has significant global coverage across Europe, the Americas, the Middle East, Africa, and Asia Pacific regions.

4.2 In the UK

NTT DATA UK Ltd (NTT DATA) is a subsidiary of the NTT DATA Corporation and is a systems integrator headquartered in the City of London and Birmingham. NTT DATA in the UK is a £400m+ per annum turnover organisation that focuses on supporting clients in:

- Public Services
- Automotive
- Banking and Financial Services
- Education and Research
- Energy and Utilities
- Healthcare
- Insurance
- Life Sciences and Pharma
- Manufacturing and Consumer Packaged Goods
- Retail
- Telco, Media and Technology
- Travel, Transportation and Logistics

NTT DATA has partnerships with a number of leading software vendors and works closely with NTT group companies to provide a wide range of solutions to UK clients.

4.3 How we help our clients

NTT DATA provides a portfolio of services to support every aspect of its clients' business technology life cycle, including:

- Strategy to create competitive advantage
- Implementation with speed, confidence, efficiency, and surety
- On-going management to optimise your assets with the best resource mix and cost
- Evolution to create new opportunities and future-proof your enterprise

NTT DATA helps its clients by building value through the visualisation and realisation of innovation. This involves working in close partnership with clients to:

- Design innovation - create robust IT strategies geared towards optimising business processes and the use of IT and networking concepts along the customer's entire value chain. We help our clients use IT to differentiate themselves from their competitors
- Develop solutions - use our advanced systems structuring and application capabilities to develop and provide solutions that make business innovation a reality
- Drive performance and efficiency - provide constant support for our clients helping them exploit the full potential of their IT solutions and take advantage of the latest IT innovation thinking

4.4 Trade body membership and accreditations

NTT DATA has corporate membership of the MCA trade body and our activities are supported by technical and vendor accreditations:

- Snowflake Global Elite Partner
- Informatica Enterprise Premier Partner
- Google Cloud Platform Premier Partner
- Microsoft Solution Partner Designation: Business Application, Data & AI, Digital & App Innovation, Infrastructure, Security, Modern Work.
- AWS Premier Partner | AWS Partner Programs; Premier Tier Services, AWS Managed Service Provider, Authorized Commercial Reseller, AWS Public Sector Partner, AWS Solution Provider Program, AWS Public Sector Solution Provider, Authority to Operate on AWS
- AWS Competencies | Machine Learning Consulting, Telecom Services, DevOps Consulting, Government Consulting, Migration Consulting
- Salesforce Platinum Partner
- Genesys Global Gold partner
- Service Now Elite partner
- Red Hat Premier Business Partner
- Palo Alto Networks Diamond Innovator (Global)
- Check Point 5 Star Partner
- Fortinet Global Partner
- F5 Platinum Partner
- Zscaler GSI
- Cisco Gold Partner
- SAP Global Platinum Partner
- Dell Titanium Partner

4.5 Services

We support UK clients through the following digital focus areas:

- Customer Experience - engaging with customer to maximise user understanding, engagement and support
- Data & Intelligence - excel in new data model creation using gathered intelligence that can produce actionable results for organisation success
- Intelligence Automation - automate repetitive business processes for success in a digitally-dynamic environment
- Internet of Things - connecting and communicating with an ever-expanding base of devices connected to the internet
- IT Optimisation - revolutionising IT environments by delivering the agility necessary to remain effective in a rapidly changing landscape
- Cyber security - protecting against data breaches and unauthorized use of confidential information in today's connected digital world

4.6 Further information

See <https://uk.nttdata.com> for further information, or contact us at nttdatauk.requirements@nttdata.com