

Service Definition Document for G-Cloud 15 Services

Cloud Customer Relationship Management
Solutions and Services (Salesforce)

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1 Service Definition for Cloud Customer Relationship Management Solutions and Services

1.1 Introduction

This is the Service Definition Document for NTT DATA UK Ltd (NTT DATA) cloud customer relationship management solutions and services 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.

- Agentforce Delivery – Agentforce is the agentic AI layer of the Salesforce platform. Solutions can be employee or customer facing but have one common theme of enabling autonomous agents to take actions. With the solution there are varied options to intelligently offload basic tasks and improve capacity for teams to deal with more complex activities. We offer end-to-end support including ideation, governance, build, test and delivery into delivering innovative AI solutions through Agentforce.
- 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.
- Salesforce 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 Salesforce for customers to self-serve and raise cases, together with NTT DATA's knowledge and best practices.
- Salesforce Design and Implementation – working with clients to design and implement Salesforce solutions for relationship management, case/service/correspondence management and contact centre solutions. These projects are often enablers for digital transformation programmes. This includes exploitation of the Force.com platform as a cloud-based development platform for rapid application development and deployment.

- Salesforce 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.
- Salesforce 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. Upgrade services for Salesforce can include migration from 'Classic' to Lightning user interface.
- Salesforce 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.
- Salesforce Diagnostic – designed to help customers who have a Salesforce system but have problems with the solution that need to be resolved. Potential issue areas include: performance, functionality issues and faults

Please see Section 2 for full service descriptions.

2 Service Descriptions

2.1 Agentforce Delivery

2.1.1 Introduction

Agentforce is an AI-powered digital workforce platform that enables organisations to design, deploy, and manage intelligent agents that can autonomously perform tasks, support users, and interact with systems and data. Built to integrate securely with existing enterprise platforms (such as CRM, case management, and data systems), Agentforce combines generative AI, automation, and business rules to deliver consistent, scalable, and trustworthy outcomes.

2.1.2 Scope of Service

- **Agentforce Strategy and Readiness Assessment:** Evaluate, align with and frame Agentforce in the context of your organisations AI strategy and overall goals. Support in building Agentforce enablement roadmaps for a phased implementation, aligning with governance and stakeholder functions.
- **Use Case Discovery and Value Definition:** Run structured workshops to identify and prioritise business-aligned agent use cases. Define success metrics, ROI and measurable outcomes. Use our weighted decision matrices to calibrate and assess the best use cases to set your teams up for success, aligning with Agentforce features and the Salesforce product roadmap.
- **Agentforce Architecture and Solution Design:** Design secure, scalable Agentforce architecture aligned to enterprise and public sector standards, including GDPR and Secure by Design processes.
- **Custom Agent Build and Configuration:** Build and deliver task-specific actions to be executed by AI agents. Implement prompt design, agent behaviours, guardrails and escalation paths.
- **Data Readiness & Integration Services:** Assess data quality and appropriate fit for AI solutions. Assess data stewardship options where data quality needs to be improved prior to use. Where relevant, we can support in designing and building integration via API to the Salesforce estate.
- **Data Cloud enablement:** To get the most out of Agentforce, Data Cloud can be used to process unstructured data such as PDFs and other documents. We can implement data cloud and use this as a means of surfacing data from multiple systems – whether that's multiple Salesforce instances or other enterprise applications including data warehouses.
- **Security, Privacy and AI Governance implementation:** Configure role-based access, data masking and compliance controls, for responsible AI development in non-production environments through to photoionization activities. We can support in building ethical AI governance principles where these are yet to be established.
- **Testing, validation and risk management:** Perform functional, security and ethical AI testing. Validate agent accuracy and issues potentially including data bias issues before the agent is delivered to production.
- **Change Management & User enablement:** delivery training, documentation and adoption strategies for staff, ensuring stakeholders are part of the journey and position AI agents as assistive tools to augment (and not replace) productivity.
- **Managed Services and continuous optimisation:** provide ongoing monitoring, performance tuning and enhancement of agents. Adapt agents as policies, regulations and organisational needs evolve over time.

2.1.3 Approach

We recommend taking an agile approach to Agentic AI development. A key element of building AI agents is through prompt engineering – that is refining and iterating on prompts/instructions given in natural language to LLM models and the Atlas reasoning engine. Timelines and phasing will vary depending on the scale and complexity of the agent. Agents that align to 'out of the box' use cases will require less development than custom agents.

We also recommend a proportionally significant amount of time be dedicated to testing agents. Testing at scale can be achieved quickly using the Agentforce Testing Centre, again utilising AI to generate an array of valid test cases. Exploratory manual testing is also used to test a range of scenarios, and feedback from test cases can guide the confidence in the solution, determining the scope of testing from previous results for the specific context and use case.

Overall, a phased approach with agile foundations is effective in balancing speed to launch with agent accuracy, efficiency and alignment to the organisations use case and risk appetite.

2.2 Customer Experience Management Consultancy

2.2.1 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.

2.2.2 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 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.

2.2.3 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.
- 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

2.3 Salesforce Intelligent Case Management

2.3.1 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 for customers to self-serve and raise cases.

2.3.2 Scope of Service

Leveraging NTT DATA's extensive public sector experience together with in-depth knowledge of Salesforce, 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 Experience Cloud Portal enables independent problem resolution and reporting, including real-time updates to keep customers informed.

2.3.3 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.

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.

2.4 Salesforce Design and Implementation

2.4.1 Introduction

Salesforce 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 mean Salesforce 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.

Salesforce user adoption is also high due to its intuitive Lightning user interface which allows new users to quickly become productive. Organisations can choose to deploy Salesforce CRM in many ways including the browser client, on mobile devices such as mobile phones and tablets or to citizens and partners via community portals. Leading IT industry analyst Gartner place Salesforce as the market leader in the CRM space.

2.4.2 Scope of Service

Salesforce 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 Salesforce Summit partner NTT DATA has many years' experience of designing and implementing Salesforce solutions. 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 App store to exploit pre-build components rather than having to configure from scratch.

Specific Design and Implementation services include:

- Business requirements to solution mapping
- Core Salesforce configuration and customisation– utilising out of the box features to minimise development and ensure fast deployment and return on investment
- Community (customer and partner) configuration and customisation
- Integration to other systems (e.g. Web sites, back-office systems etc.) utilising integration platforms, Mulesoft, ETL tools and point to point solutions
- Exploitation of the extended Salesforce AppExchange to extend the capabilities delivered without code development
- Test support and automation
- User training and business change consultancy
- On-going support and hyper care services

2.4.3 Approach

Over many years we have developed a number of CRM specific implementation methodologies ranging from traditional waterfall to iterative and agile and 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 and Scrum Master certified and experienced in delivering Salesforce projects. Our projects are delivered using UK based Salesforce certified consultants and developers. We have skills in a wide range of requirements capture, configuration and release management tools such as those from Alsatian.

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. This framework supports Dev Ops and Continuous Integration processes allowing a fully incremental development approach.

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.

2.5 Salesforce Support

2.5.1 Introduction

NTT DATA offer a Salesforce Support 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 Salesforce certified, or allocated to a 3rd line Salesforce specialist consultant. Support can be provided not just for the core Salesforce 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, can 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.

2.5.2 Scope of the Service

NTT DATA offers full ISO 20000:2011 support services 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.
- Salesforce 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 standard introduction.
- 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.

2.5.3 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.

2.6 Salesforce Upgrade

2.6.1 Introduction

Given its architecture, and assuming a compliant initial development Salesforce upgrades are seamless. However, there is still a requirement to:

- Test the upgrades in a Sandbox prior to the scheduled production upgrade
- Review the new version to identify if there are new capabilities that can be exploited to either remove custom code or deliver additional functionality

Additionally, with the recent versions of Salesforce the Lightning client has been introduced and has matured to a stage that it can be exploited to provide a much improved user experience supporting improved user adoption. NTT DATA has experience of upgrading from 'Classic' to Lightning Salesforce for both full users and community portal users.

2.6.2 Scope of Service

Upgrade services provided include:

- Impact assessment and business case development for upgrade
- Migration from Classic to Lightning interface
- Management of the Salesforce release process including:
 - Testing of new release in test/sandbox
 - Any code rectification
 - New feature analysis and exploitation
 - Deployment support into live

2.6.3 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; understand any functional issue or concerns with the solution; identify any third party products being used within the solution; obtain a sandbox copy of the 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:

- Apply and test latest release; rectify and issues
- Identify any quick wins that could be implemented as part of the upgrade project.

c) Development/Test Upgrades and Solution Build

- Obtain test sandbox
- Apply upgrade to sandbox
- Identify and resolve any issues following the upgrade.
- Test integrations and rectify as required
- System testing of the solution.

c) Training and Solution User Test

Ensure the upgraded Salesforce 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.
- 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".
- Approve Salesforce upgrade to production instance.
- Upgrade/deploy any required 3rd party products (on-premise and/or online).
- Import changes from the test activities.
- Provide post-upgrade support.

f) Lightning Exploitation

If exploiting the new Lightning interface this can be done at any stage as both 'Classic' and Lightning interfaces can be run in parallel. To upgrade we would:

- Develop new Lightning forms in an agile model using Show and Tell sessions to obtain user acceptance.
- Work with business team to update training material
- Develop comms plan
- Pilot new interface
- Update with feedback
- Roll out to full user base (on a functional area/team at a time) including training in the changed solution

2.7 Salesforce Migration and Integration

2.7.1 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 Salesforce 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 Salesforce with a host of other applications including client legacy systems.

2.7.2 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)
- Mulesoft Anypoint enterprise integration platform
- Azure Service Bus or Logic Apps integration service/framework
- Tibco Scribe Insight integration platform
- Dataloader and Dataloader.io

In some instances, for migration, 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 Salesforce Summit partner and Scribe Elite partner; consequently, our integration team is trained and certified in leading integration products for Scribe Software and MuleSoft.

2.7.3 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.

2.8 Salesforce Diagnostic

2.8.1 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 Salesforce Diagnostics service is designed to help customers who have an existing Salesforce 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 Salesforce 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 Salesforce 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.

2.8.2 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

2.8.3 Approach

The Salesforce 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.
- Perform a general review of the Salesforce system to gain an understanding of its configuration and customisations.
- Workshops to understand functional requirements.

b) Investigation

- Review Salesforce 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.

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