

G-CLOUD 15 SERVICE DESCRIPTION

Trustmarque CRM Services

Submission Ready Form Responses

1 SECTION: Service Attributes

1.1 Q1. Service Type

Cloud Support

2 SECTION: Service Name

2.1 Q2. Service Name

Trustmarque CRM Services

3 SECTION: About Your Service

3.1 Q3. Service Description

Word Limit: 50 words maximum | Actual: 45 words ✓

Professional services for Microsoft Dynamics 365 customer relationship management implementations.

We deliver assessments, migrations, upgrades, and optimisation across Sales, Customer Service, and Field Service applications, enabling UK public sector organisations to transform customer engagement, improve information retrieval, and enhance employee experience through modern CRM capabilities.

3.2 Q4. Service Categories

Selected categories:

Advisory & Strategy:

- ☐ Capability analysis
- ☒ Enterprise architecture
- ☐ Cloud gap assessment
- ☒ Architecture options analysis
- ☐ Delivery Road-mapping
- ☒ Data auditing and organising
- ☒ Data/information structure design
- ☒ Engagement and communication planning
- ☒ Project management and governance

☒ Service optimisation/right sizing

☒ Mobilisation coordination

Testing:

☒ Development

☒ Implementation

☐ Load Testing

☐ Stress Testing

☐ Volume Testing

☐ Soak Testing

☐ Scalability Testing

☐ Capacity Planning

☐ Assurance/testing design

☐ Infrastructure performance testing

☐ Accessibility testing

4 SECTION: Service Features and Benefits

4.1 Q5. Service Features

Word Limit: 10 words maximum | Actual: 10 words ✓

#	Feature	Words
1	Dynamics 365 CRM health assessments and configuration reviews	8 ✓
2	Migration services from legacy CRM to Dynamics 365	8 ✓
3	Sales, Customer Service, and Field Service implementations	7 ✓
4	Data migration, cleansing, and integration services	6 ✓
5	Solution architecture and target operating model design	7 ✓
6	Custom entity and workflow development	5 ✓
7	Power Platform integration and automation configuration	6 ✓
8	User adoption and change management enablement	6 ✓
9	Performance optimisation and system tuning	5 ✓
10	Post-implementation hypercare and stabilisation support	5 ✓

4.2 Q6. Service Benefits

Word Limit: 10 words maximum | Actual: 10 words ✓

#	Benefit	Words
1	Improves customer engagement through unified relationship management	7 ✓
2	Reduces manual processes via intelligent automation and workflows	8 ✓
3	Accelerates time-to-value with proven implementation methodology	6 ✓
4	Enhances employee productivity through streamlined CRM interfaces	7 ✓
5	Optimises information retrieval with centralised customer data	7 ✓
6	Lowers total cost of ownership through cloud-native solutions	8 ✓
7	Enables data-driven decisions with built-in analytics and insights	8 ✓
8	Increases customer satisfaction through consistent service delivery	7 ✓
9	Reduces risk via structured migration and validation approaches	8 ✓
10	Supports compliance with UK public sector requirements	7 ✓

5 SECTION: Service Scope

5.1 Q7. Service Constraints

Services are delivered remotely by default, with on-site delivery available where required and agreed during engagement scoping.

Customer responsibilities include:

- Providing timely access to existing CRM systems and data for assessment and migration activities
- Ensuring stakeholder availability for discovery workshops and design sessions
- Providing test environments and user acceptance testing resources
- Maintaining appropriate Microsoft Dynamics 365 licensing

Geographic coverage: UK-based delivery with all consultants UK-resident. Services available to all UK public sector organisations including central government, NHS, local authorities, devolved administrations, and blue light services.

6 SECTION: Reselling

6.1 Q8. Supplier Type

☒ I'm not a reseller

☐ I'm a reseller providing extra features and support not available from the original supplier

- ☐ I'm a reseller providing extra support
- ☐ I'm a reseller not providing extra features or support

6.2 Q9. Organisation Whose Services Are Being Resold

N/A – Not a reseller

7 SECTION: User Support

7.1 Q10. Email or Online Ticketing Support

- ☒ Yes
- ☐ Yes, at extra cost
- ☐ No

7.2 Q11. Support Response Times

Response times are subject to an agreed SLA established during engagement scoping.

7.3 Q12. User Can Manage Status and Priority of Support Tickets

- ☒ Yes
- ☐ No

7.4 Q13. Online Ticketing Support Accessibility

- ☐ WCAG 2.2 AAA
- ☒ WCAG 2.2 AA
- ☐ WCAG 2.2 A
- ☒ EN 301 549
- ☐ None or don't know

7.5 Q14. Phone Support

- ☒ Yes
- ☐ No

7.6 Q15. Phone Support Availability

- ☐ 24 hours, 7 days a week
- ☒ 9 to 5 (UK time), 7 days a week
- ☐ 9 to 5 (UK time), Monday to Friday

7.7 Q16. Web Chat Support

- ☒ Yes
- ☐ Yes, at an extra cost
- ☐ No

7.8 Q17. Web Chat Support Availability

- ☒ 24 hours, 7 days a week
- ☐ 9 to 5 (UK time), 7 days a week
- ☐ 9 to 5 (UK time), Monday to Friday

7.9 Q18. AI Chatbot

- ☐ Yes
- ☒ No

7.10 Q19. Web Chat Support Accessibility Standard

- ☐ WCAG 2.2 AAA
- ☒ WCAG 2.2 AA
- ☐ WCAG 2.2 A
- ☒ EN 301 549
- ☐ None or don't know

7.11 Q20. How the Web Chat Support is Accessible

N/A – Web chat meets WCAG 2.2 AA and EN 301 549 standards

7.12 Q21. Web Chat Accessibility Testing

Web chat platform undergoes regular accessibility testing including keyboard navigation, screen reader compatibility, colour contrast verification, and focus management. Testing conducted with JAWS, NVDA, and VoiceOver screen readers. Usability testing performed with assistive technology users as part of supplier quality assurance programme.

7.13 Q22. Support Levels

For professional services engagements, Trustmarque provides comprehensive support through our delivery methodology:

Standard Support (included):

- Dedicated engagement manager throughout project lifecycle
- Access to certified Dynamics 365 consultants during business hours
- Project status reporting and governance meetings
- Knowledge transfer sessions and documentation

HyperCare Support (post-implementation):

- Extended support period following go-live (typically 30 days)
- Priority access to delivery team for issue resolution
- Proactive monitoring review and optimisation recommendations

For any resultant managed service requirements subsequent to the professional services engagement, support levels and pricing will be scoped separately based on specific customer requirements.

Technical Account Manager services are available at additional cost for ongoing strategic guidance.

8 SECTION: Staff Security

8.1 Q23. Staff Security Clearance

- ☐ Staff screening performed which conforms to BS7858:2019
- ☒ Staff screening performed but doesn't conform with BS7858:2019
- ☐ Staff screening not performed

8.2 Q24. Government Security Clearance

- ☒ Up to Developed Vetting (DV)
- ☐ Up to Security Clearance (SC)
- ☐ Up to Baseline Personnel Security Standard (BPSS)

9 SECTION: Pricing

9.1 Q25. Discount for Educational Organisations

- ☒ Yes
- ☐ No

10 SECTION: Documents

10.1 Q26. Service Definition Document

N/A – To be uploaded separately

10.2 Q27. Terms and Conditions Document

N/A – To be uploaded separately

10.3 Q28. Pricing Document

N/A – To be uploaded separately