

**G-Cloud 15 – RM1557.15**

**Lot 3 - Cloud Support**

**Microsoft Dynamics 365**

**Safesforce to Dynamics 365 Migration  
(XitForce)**

**Service Description**

## G-Cloud 14 - Lot 3 Support – Salesforce Migration Services - XitForce - Service Description

### Foreword

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### Validity

This proposal and all information contained within are valid for a period of 180 days from January 30, 2026.

### HCLTech Contact

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### About HCLTech

HCL Technologies (HCLTech) is a next-generation global technology company that helps enterprises reimagine their businesses for the digital age. Our technology products, services and engineering are built on four decades of innovation, with a world-renowned management philosophy, a strong culture of invention and risk-taking, and a relentless focus on customer relationships.

Powered by a global team of 225,000+ diverse and passionate people across 60 countries, we deliver smarter, better ways for all our stakeholders to benefit from technology. With a worldwide network of Research and Development (R&D), innovation labs and delivery centres, along with expertise in Digital, Engineering and Cloud, we deliver solutions that fulfil the traditional, transformational and future needs of clients across the globe.

### Service Description

HCLTech XitForce is a Copilot, Artificial Intelligence driven migration solution aimed at accelerating the transition from Salesforce (SFDC) to Microsoft Dynamics 365 Customer Engagement (D365).

Originally designed exclusively for migrations from SFDC to D365, the increased adoption of AI techniques and technologies now means that XitForce has transformed into an intelligent Data Migration Tool which can migrate data from any source to any target.

The solution can be connected to a new D365 environment and automatically create solutions, tables, fields, and relationships based on outputs of your current SFDC instance. The user-friendly interface built using Model Driven App in Dataverse gives us the option to include or exclude components at the click of a button. XitForce can be utilised to rapidly migrate desired functionality from your old Salesforce (SFDC) environment to your new Dynamics 365 environment, allowing you to focus on gaps and spend less development time on fits.

XitForce also integrates with Azure Data Factory to migrate data from SFDC to D365 to allow immediate unit testing, and the ability for users to be assured their most critical desired tables will be migrated with necessary data to enable them to continue their work immediately. XitForce also allows Data Migration and Integration to start sooner in the Development Life Cycle, shortening the time for the overall SFDC to Dynamics migration.

Key Deliverables:

- New custom tables (entities) and fields in D365
- Data map of the migrated components
- Data Migration of desired tables
- Input into Project Plan/ OCM Plan
- Input into Digital Transformation Plan
- Environmental enterprise architecture blueprint.

Transformation from SFDC to Dynamics can be complex and time consuming to achieve. Getting users familiar with Dynamics can be expediated by ensuring critical business data is available from day one to instill confidence into end users.

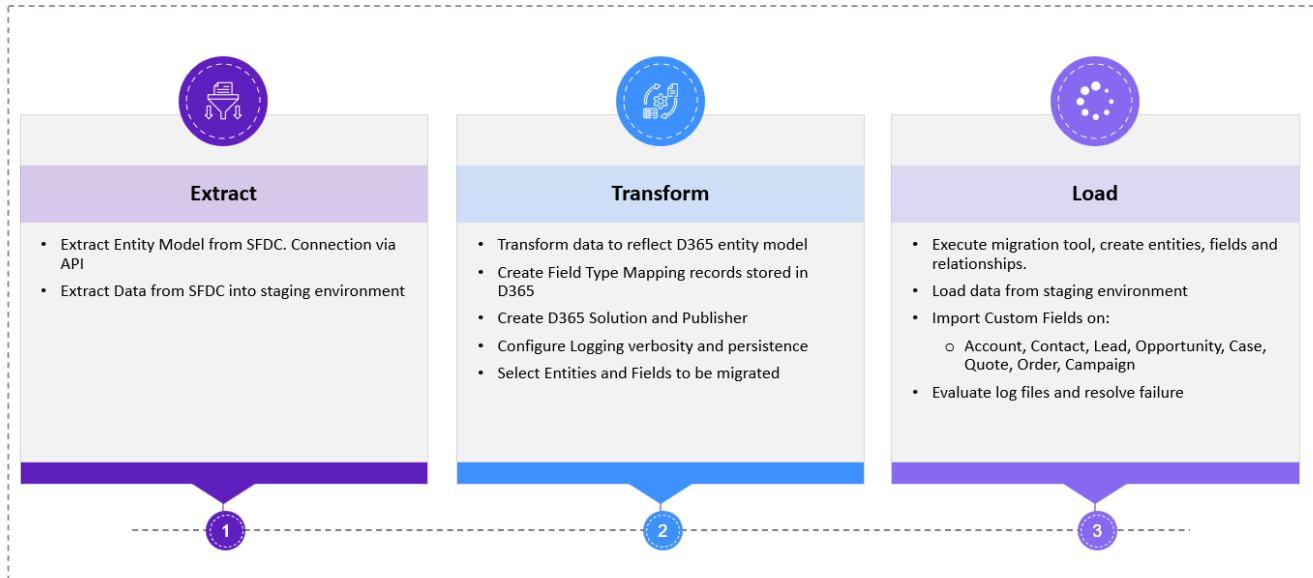
XitForce as a solution tool can be extended easily to handle any complex custom object migrations from SFDC to Dynamics to meet the needs of complex business environments.

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## At a glance



## Our technical approach



## Technical Specifications

The HCLTech's **XitForce** is built in Microsoft AI Business Solutions including Dynamics 365 and Power Platform and accessed through a secure internet connection. Users will require licences for these fully cloud Software as a Service (SaaS) services, which can be obtained through HCLTech's licensing service for Microsoft.

| Active Salesforce Migration Objects |                         |               |        |
|-------------------------------------|-------------------------|---------------|--------|
| Name                                | Display Name            | Type          | Ignore |
| Account                             | Accounts                | Base          | No     |
| Contact                             | Contacts                | Base          | No     |
| ApexComponent                       | Visualforce Components  | Extending     | No     |
| WorkOrder                           | Work Orders             | Field Service | No     |
| Skill                               | Skills                  | Field Service | No     |
| Lead                                | Leads                   | Sales         | No     |
| Opportunity                         | Opportunities           | Sales         | No     |
| Case                                | Cases                   | Service       | No     |
| Contract                            | Contracts               | Service       | No     |
| Task                                | Tasks                   | Service       | No     |
| Holiday                             | Holidays                | Setup         | No     |
| WorkOrderStatus                     | Work Order Status Value | Setup         | No     |
| BusinessHours                       | Business Hours          | Setup         | No     |
| LeadStatus                          | Lead Status Value       | Setup         | No     |
| User                                | Users                   | Setup         | No     |
| UserRole                            | Role                    | Setup         | No     |

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## Implementation

HCLTech will lead the delivery of this programme of work by following their tried and tested implementation method, *Proven Process*. This method comprises a set of templates, principles, tools and ways of working that are used by our delivery teams on all projects and has been designed to be used across any part of the Dynamics 365 technology stack.

The method follows a hybrid agile/ iterative approach but can lend itself to more of a waterfall or agile focus, dependent upon the abilities of our clients and the drivers of each project around time, cost and quality.

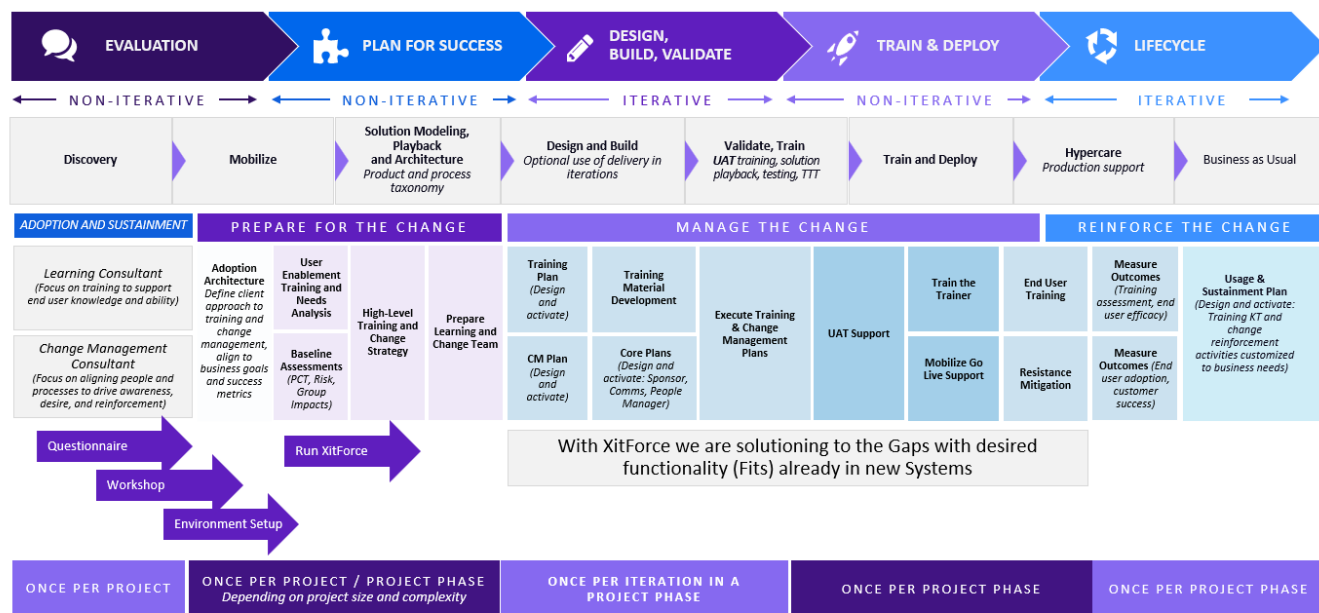
We have found that an iterative approach helps provide more certainty around firming up scope, whilst providing delivery flexibility to accommodate minor changes. Our Plan for Success phase tracks a more typical Waterfall style analysis approach, whereas our Design, Build, Validate phases follow an iterative approach and are based on agile working practices supporting a higher degree of solution confidence through regular playbacks and knowledge transfer between project teams.

We appreciate that client teams do not often have a lot of exposure to agile but our approach embraces many of the principles of agile whilst still following a structured way of working. There should be a high degree of involvement from Subject Matter Experts (SMEs) throughout the implementation.

We encourage SMEs to be as hands on with the application as possible playing an active role in regular playbacks, as we progress through the solution build. The SMEs remain active in the design, build, testing and training for the deployment of the solution and consequent support.

An overview of how XitForce can be embedded into Proven Process, highlighting the adaptable approach is here:

## The high-level approach in Proven Process



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## Support Arrangements

Once you have successfully migrated to Microsoft Dynamics 365 you may wish to explore support services with ongoing continuous innovation and continuous development options.

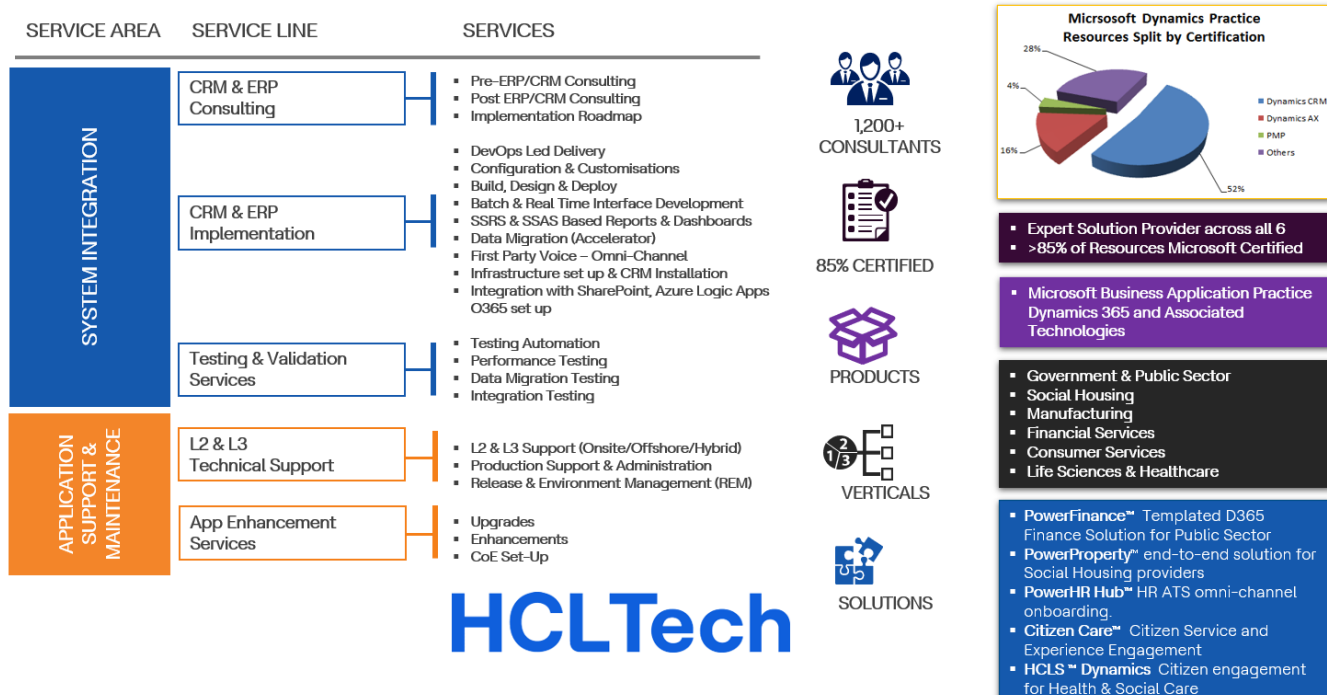
As businesses continue to undergo digital transformation, customers are increasingly demanding more from their software applications. This means business develop in-house capabilities to support their users, leveraging a 3<sup>rd</sup> party provider for complex issue resolution or changes.

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HCLTech is experienced in helping and supporting customers through this journey, we provide the level of cover to enable you to take on the support you are comfortable with in-house, backed up by our expertise as needed, it is a model that works well, you use our specialist services where they add maximum value.

HCLTech can offer a range of support options of all our solutions including a pay-as-you-go service, a dedicated support engineer or a subscription service depending on size and complexity of the service. Availability can be up to 24 hours 365/7 if required.

## HCLTech Microsoft Practice Centres of Excellence & IP



Microsoft Learn offers online access to training courses free to empower your organisation with the skills to operate and maintain the solution entirely without the need for third-party organisations

### Business Continuity/ Disaster Recovery

The proposed solution will be hosted on the Microsoft Datacentre network and managed completely independently of HCLTech by Microsoft. Each one of Microsoft's online services must have an established Business Continuity Plan (BCP), which is required to be reviewed and tested at least once every 12 months.

A set of tests are carried out quarterly and reported on as well, as more frequent resiliency testing. Microsoft has moved beyond the traditional strategy of relying on complex physical infrastructure and has built industry-leading redundancy directly into their cloud services with less complex physical infrastructure and more intelligent software controls.

For Crisis Management & Mission Control, a 24x7 geo-diverse team, utilises an internal framework to reactively manage planned and unplanned interruption events globally for the Microsoft Service and Support organisation, which includes event response and crisis management. Mission Control works in close partnership with enterprise crisis management and disaster response teams and provides coordinated response to major catastrophic events.

### Data Backup/ Restore

Strong data protection requirements are applied to classify, and store as well as transfer and usage of such data, both during and after an engagement.

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Critical systems and infrastructure that store customer data have stringent recovery requirements to minimise any data loss and are designed to protect customer information in compliance with Microsoft Enterprise security standards and requirements. Production environments are configured with Azure disaster recovery support that includes the following:

- Azure SQL active-geo replication for primary databases, with a Recovery Point Estimate (RPO) of < 5 seconds
- Geo-redundant copies of Azure blob storage (containing document attachments) in other Azure regions
- Same secondary region for the Azure SQL and Azure blob storage replication.

### Security

By default, only authenticated users who have user rights can establish a connection through an enterprise identity and access system (the preferred service is Microsoft Azure Active Directory [now known as Entra ID]), the primary identity provider. To then access the system, users must be provisioned into a Dynamics instance and should have a valid Entra ID account in an authorised tenant.

Microsoft Defender ATP seamlessly integrates with existing security solutions - providing out of the box integration with Security Information and Event Management (SIEM), ticketing and IT service management solutions, Managed Security Service Providers (MSSP), IoC indicators ingestions and matching, automated device investigation and remediation based on external alerts, and integration with Security Orchestration and Automation Response (SOAR) systems.

HCLTech has a well-established risk-based Information Security Programme. The company has published a risk assessment process, guidelines and procedures in the HCLTech Information Security Management System (ISMS) based on ISO 27001:2013. HCLTech is accredited for ISO27001:2013 information security standard by Bureau Veritas for management of information security in the business of the provision of network monitoring and management services, IT infrastructure and data centre services, IT security infrastructure and managed security consulting services.

### Exclusions

Integrations into third party systems can be facilitated by the provision of Power Platform, Power Automate and Azure Logic Apps by HCLTech but the third-party data and extraction/ insertion is the responsibility of the customer.

Some capabilities may include consumption costs payable to Microsoft for transactions and storage.

### Account Management

Every customer has an allocated Account Manager who will act as an escalation point for issues and will introduce new features and opportunities to the customer. The Account Manager will be supported by the HCLTech customer success team who will monitor the effectiveness of the solution and customer satisfaction.

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