

G-Cloud 15 – RM1557.15

Lot 3 - Cloud Support

MS Dynamics 365 Customer Engagement

Service Description

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Validity

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

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About HCLTech

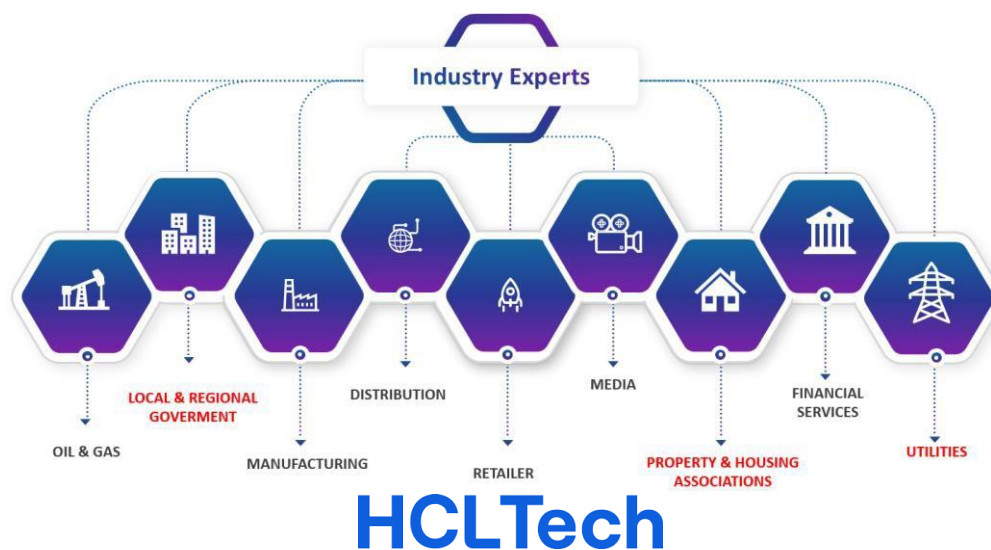
HCL Technologies (HCLTech) is a next-generation global technology company that helps enterprises reimagine their businesses for the digital age. Our technology products, services and engineering are built on four decades of innovation, with a world-renowned management philosophy, a strong culture of 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, “supercharging progress” for our clients, employees, communities, and the planet.

Service Description

HCLTech's integrated CRM Solution harnesses the power of the Microsoft Cloud to drive digital transformation in any sector.

Microsoft Dynamics 365 (D365) is an AI infused, intuitive cloud-based application which enables you to make readily available information from any location with internet access. It is continuously developed for a technologically evolving world and offers a variety of modules offering Back-Office, Middle-Office and Front-Office functionality through a number of CRM modules such as Sales, Customer Service, Field Service and Customer Insights (Marketing) of which are wholly integrated and sharing a common platform (Dataverse) that can be extended using Power Platform, the native low code, pro-code that underpins D365 throughout.

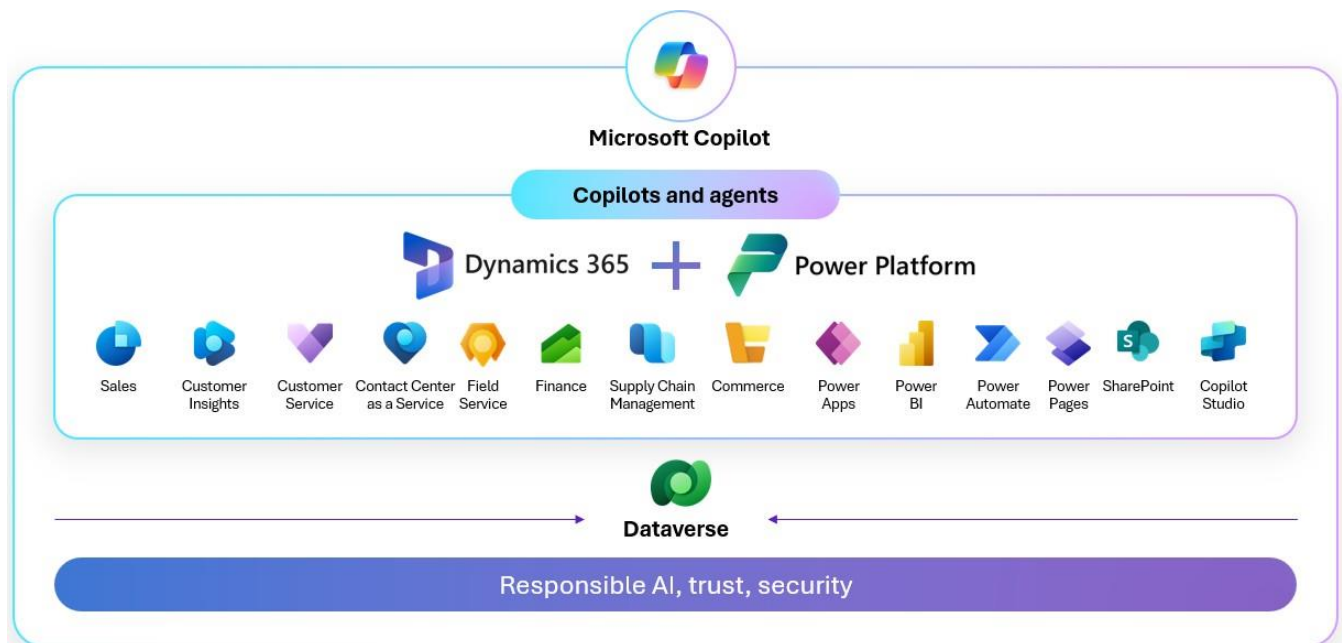


Truly empowering organisations of any size to wholly connect data and processes with seamlessly integrated business operations to offer a single 360-degree view of your business. Helping simplify, automate and streamline business processes within one system aligned to all your stakeholders needs, whether they are partners, employees, citizens, customers, contractors or every form of stakeholder all are aligned with Dynamics 365.

Features

Public sector and commercial organisations live in a challenging and ever-changing political and economic landscape, one which demands to be embraced by organisations of every hue, everywhere. Meeting these challenges without breaking stride requires application and dedication. With Dynamics 365 you have a flexible ally offering an array of functionality that will help you meet your challenges and thrive.

MS Dynamics 365 Customer Engagement (CE) is shown in the diagram below.



Flexible to be shaped into the specific requirements of your organisation HCLTech configure the Microsoft Dynamics 365 solution using best practice principles to eliminate manual and repetitive tasks and introduce increased focus and productivity with the use of Copilot.

The following Customer Engagement functionality are included in the Sales Module:

- Account & Contact Management
- Lead to Opportunity Process
- Quote Management
- Sales Order & Invoice
- Sales Performance
- Predictive Scoring Models
- Conversation Intelligence
- Sales Pipeline Management
- Sales Reporting Analytics.

The following Customer Engagement functionality are included in the Customer Insights Module:

- Customer Journey Orchestration
- Account Based Marketing
- Multiple Lead Scoring
- Customer Insights
- Spam Score and Automated Scheduling
- Segments
- Customer Channels
- Social Media Post Analytics
- Event Management
- Campaign Management.

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The following Customer Engagement functionalities are included in the Customer Services Module:

- Case Management
- Knowledge Base Management
- SLAs and Unified Routing
- Resource Management
- Service Tasks
- Entitlements
- Queues.

The following Customer Engagement functionalities are included in the Field Service Module:

- Work Order Management
- Inspections
- Resource Management
- Inventory Management
- Assets Management
- Case/ Opportunity to Work Order Process
- Agreements
- Schedule Board and Work Calendar
- RSO & Route Optimisation.

Benefits

Microsoft Dynamics 365 enables your organisation to collect, store, manage, and interpret data from many business activities. Using role-based access and workspaces, it is highly secure and 'evergreen', so you always access the latest version, offering access to the latest technological advances such as AI with Microsoft copilot, you can be comfortable knowing that everyone in the organisation is working from the same data. A unified approach to business operations unmatched in disconnected systems, through the following.

- Current Systems are inflexible, traditional in design and cannot be easily changed. Microsoft Dynamics 365 "belongs" to the customer and they can change and add functionality as they require.
- High number and cost of lots of different systems – The Dynamics 365 platform reduces your overall IT estate bringing applications together into one Microsoft Cloud
- Lots of different data sources – Dynamics 365 brings all data into a single source and enables access for analytics or extensions out to Power Apps.
- Copilot for Artificial Intelligence efficiencies for each specific CE module
- Dynamics 365 is a customer-focused solution putting your customers at the heart of what you do.
- Our Dynamic 365 solutions are digital by design and take full advantage of digital technologies enabling channel shift and omni customer service.
- Dynamics 365 supports fully mobile and flexible working providing service for customers and users from any device, from any location at any time.

Technical Specifications

The HCLTech solutions are built in Microsoft Business Applications, 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.

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.

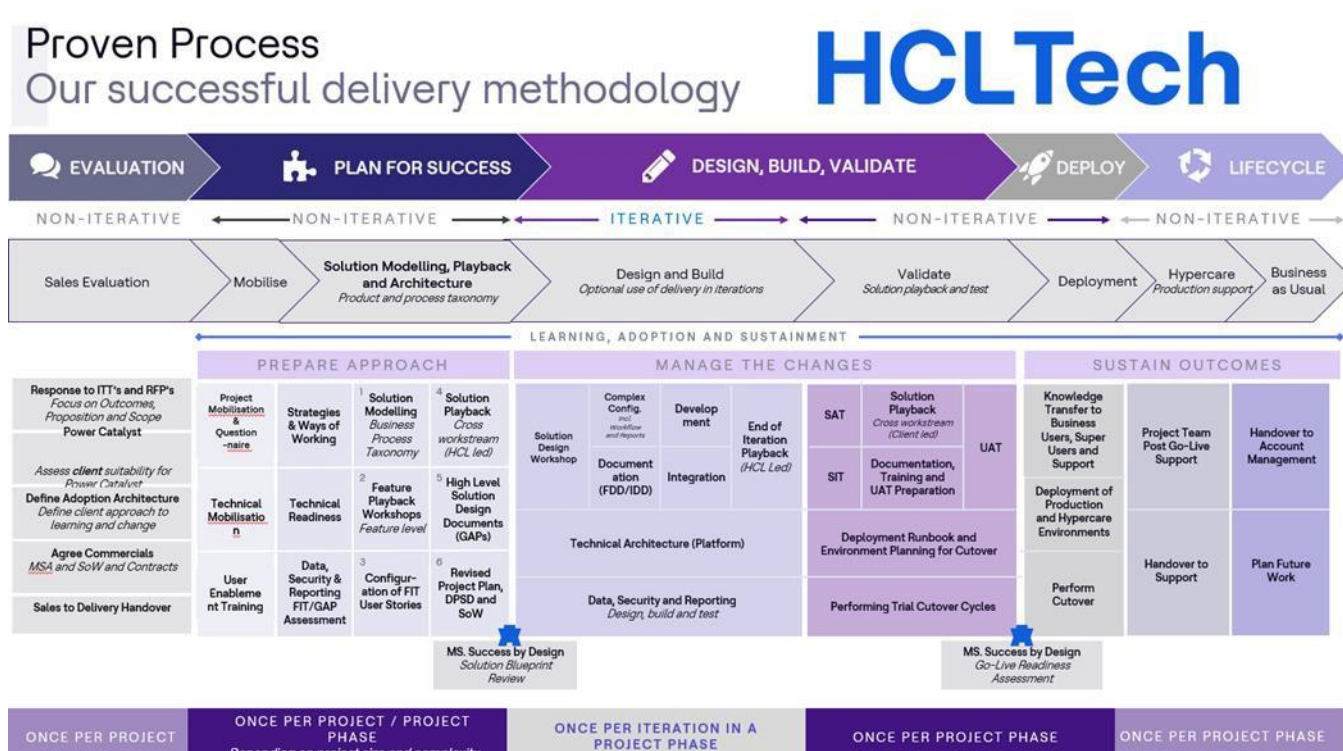
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The method follows a hybrid agile/ iterative approach but can lend itself to more of a waterfall or agile focus, dependent upon the abilities of our clients and the drivers of each project around time, cost and quality.

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 Proven Process can be seen in the diagram below:



Support Arrangements

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 3rd party provider for complex issue resolution or changes.

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.

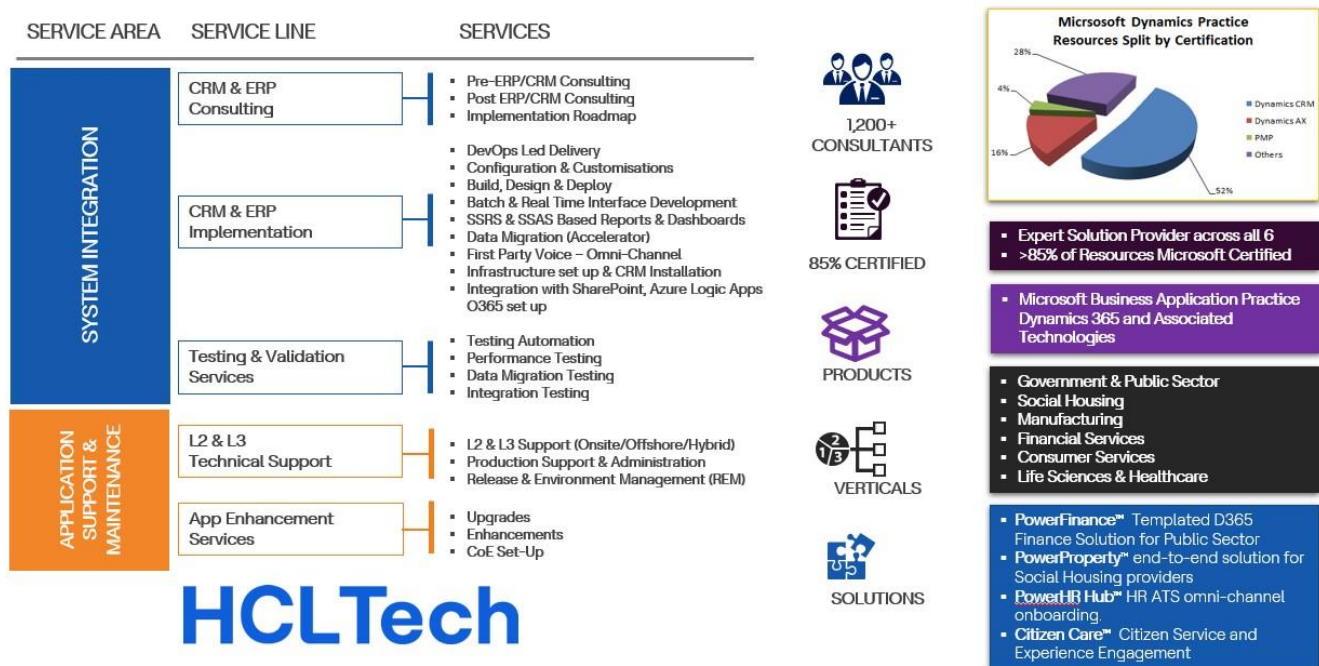
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A key part of support services is the correct execution of transition services to empower customers and future support teams with specific knowledge on the unique characteristics of the installation.

Our ASSET™ framework has been designed to focus on the Service Transition phase for Infrastructure Services, Application Operations and Support Groups. The framework encapsulates the transition-related activities, with the Due Diligence planning especially significant because it is a crucial input stage for the service transition roll out.

ASSET™ provides templates and checklists to ensure a thorough assessment of the “as is” state, which is followed by the transition, then by a steady state of operations and finally a transformation to ensure optimised performance.

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. 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 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 or 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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