

Call-Off Schedule 20 (Call-Off Specification)
Call-Off Ref:
Crown Copyright 2018

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CONTENTS

1.	3
2.	3
3.	3
4.	4
5.	5
6.	5
7.	6
8.	7
9.	7
10.	7
11.	7
12.	7
13.	7
14.	8
15.	8
16.	9
17.	9
18.	10
19.	10

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1. PURPOSE

- 1.1 The purpose of this procurement is to direct award a contract via TEPAS Lot 3 Framework for the provision of Gearset software, to support Crown Commercial Services (CCS) with the back office management of Salesforce.

2. BACKGROUND TO THE BUYER

- 2.1 CCS is one of the largest procurement organisations in Europe, providing commercial solutions to the public sector by improving the way we buy goods and services, saving money for the taxpayer and using the government's buying power to support the economy.

3. BACKGROUND TO REQUIREMENT/OVERVIEW OF REQUIREMENT

- 3.1 CCS' Salesforce is used by 700+ CCS staff and is a critical customer insight tool that will continue to inform future iterations of the CCS Gameplan.
- 3.2 There is increased pressure to improve data visibility within Salesforce by providing improvements inline with new technology such as AI and IVR and also new integrations to other platforms such as Contracts+ and Qualtrics. To ensure we continue to deliver to a high standard, there is an urgent need to improve how we manage the system and the data stored within Salesforce.
- 3.3 The Salesforce team is made up of; 2 contracted Salesforce dedicated developers, 1 permanent & 1 contracted Salesforce dedicated Business Analyst. The remaining team members' have responsibilities in addition to Salesforce. Those team members are made up of; 4 Deployment Managers (work in rotation on the sprints, 1 DM per sprint), 1 Tester (1 additional tester as and when required), 1 Service Manager, 4 Support Technicians responding to technical issues.
- 3.4 A few solutions have been reviewed such as Gearset, Copado, OwnBackup, Salesforce DevOps Center to address some of the challenges and while some would solve very specific problems it was found the Gearset was the most comprehensive and feature rich in a single platform.
- 3.5 We propose to use Gearset software, which is a Salesforce compatible software package that uses the same intuitive workflow to push changes between Salesforce orgs, source control repositories, local files, and Salesforce DX scratch orgs. Gearset is a SaaS product. The UI, configuration and backup are hosted in AWS Ireland. Metadata is stored within github version control. Connection to Salesforce is done through API, either RESTFUL or BULK depending on the process. Authentication can be done via numerous methods but we will use OAuth.
<https://docs.gearset.com/en/articles/618755-managing-salesforce-org-connections>

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3.6 Backup & Recovery

- Data in Salesforce is **NOT** currently backed up in format that is easily restorable due it being a flat file and all relationships / relational data would need to be manually reconstructed, therefore it is putting the business at risk from bad actors and limited audit capabilities on data changes
- Metadata from production is manually backed up and stored in GitHub and only done on a monthly basis currently
- Reverting changes deployed to Production need to be picked from a metadata backup and redeployed manually
- In the event of a Disaster Recovery situation, it would be a very complex and time consuming task to piece all the relational data back together
- Test restores of data are **NOT** currently performed

3.5 Testing with data

- Data in development environments is limited and needs to be manually created by team members which is time consuming (approximately 1hr)
- Data that is exported & imported is not easily obfuscated and requires manual intervention to ensure full confidentiality of Customers and Suppliers

3.6 Automation

- Environments are currently refreshed after every sprint deployment (4 weekly sprints)
- Completed user stories are manually deployed to all environments such as QA, Pre Production, Production via changesets. Currently Salesforce code changes are not assessed against static code analysis or third party security or vulnerability platforms. Gearset implements Apex PMD (https://pmd.github.io/pmd/pmd_rules_apex.html), which is the industry standard for Salesforce static code analysis. It scans code each deployment and highlights any issues, security concerns or anti-patterns. We can also leverage third party platforms such as Snyk as part of the release management process via webhooks.
- Not easy to understand the impact of changes when using changesets
- User stories and work management tool are currently decoupled resulting in multiple systems and documents been maintained

4. DEFINITIONS

Expression or Acronym	Definition
CCS	means Crown Commercial Services, the Contracting Authority
Salesforce	CCS' chosen customer relationship management tool

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COTS	Commercially available Off The Shelf
DevOps	DevOps is a combination of software development (dev) and operations (ops). It is defined as a software engineering methodology which aims to integrate the work of development teams and operations teams by facilitating a culture of collaboration and shared responsibility.
GitHub	Github is a version controlled service used to store the source code for a project and track the complete history of all changes to that code.

5. SCOPE OF REQUIREMENT

5.1 Annual subscription of Gearset, a COTS Salesforce compatible DevOps software. The term of the contract is for 3 years with the option to extend by a further 2 x 12 months.

5.2

Subscription	Quantity
Gearset Automation Teams	1
Data Backup Teams	900
Gearset Enterprise	9
Sandbox Seeding and Compliance	1

5.2 **Trial Support:** CCS to have access to a 30 day free trial to give the CCS Salesforce team full access to Gearset, including the support team for any immediate technical help and a series of workshops to efficiently evaluate and use the platform.

5.3 **Success Management:** included within the subscription cost, CCS to be allocated a dedicated Success Manager to understand the longer term goals and to build a bespoke Success Plan which is to be used as an ongoing reference during our regular catch ups. Our dedicated Onboarding manager to handle the short term goals of setting CCS up in tailored workshops and training the team on how to utilise the platform.

5.4 **Post implementation:** Gearset to provide CCS with access to additional product improvements.

6. THE REQUIREMENT

6.1 Backup & Recovery

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- Automated and granular metadata backup ensures the recovery points and easy roll back of functionality
- Complete and automated off platform data backups of critical information. Allows for granular restoration and inspection, down to the field level in the event of data loss. Data selection can be done by specific objects i.e. contact, case etc
- Provides a holistic view of changes deployed and allows quick and easy rollback.
Data recovery automatically handles complex relationships between records and therefore maintaining the integrity of the data structure which would greatly reduce downtime in the business.

6.2 Testing with data

- Easy to deploy data and its related objects from and to any Salesforce environment
- Granular control of data “masking” when populating other environments which aids compliance with data governance and other domestic laws such as GDPR. We have the ability to select the fields, and the values we want to use when we replace the data. They can all be obfuscated or masked to our requirements.

6.3 Automation

- Release pipelines allow features to be promoted upstream and downstream keep environments in sync without the need to refresh sandboxes
- Empowers the Salesforce team to easily push features quicker to QA for business to test and get feedback
- Salesforce team would gain visibility into possible conflicts, changes when of using Version Control i.e. GitHub. resulting in fewer issues. It would also allow for multiple work streams such as i10, Brightgen and other project teams to understand any impacts on functionality being built or changed
- Release management would be linked to user stories in JIRA, allowing a single source of truth and functionality deployment state
- Has the ability to add automated tests to the pipeline which are triggered as part of the release as it leverages github. Therefore we can perform any actions to hook into the process, including automated testing before allowing approval to continue through the pipeline.

7. KEY MILESTONES AND DELIVERABLES

7.1 The following Contract milestones/deliverables shall apply:

Milestone/ Deliverable	Description	Timeframe or Delivery Date
1	Successful Supplier to return signed Contract Order Form	Within One (1) day of Contract Award.

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2	Authority to receive Successful Suppliers invoice(s)	Within Ten (10) Working Days of Delivery of support confirmation
3	Plan Workshop: Discuss use-cases, evaluation team, timeframe & metrics.	Within agreed trial period
4	Setup Workshop: Create account, add team, connect orgs & build the pipeline.	Within agreed trial period
5	Tailored Workshops: Specific drop-in sessions for product and use-case evaluation.	Within agreed trial period
6	Evaluation Workshop: Review trial goals and metrics.	Post agreed trial period

8. MANAGEMENT INFORMATION/REPORTING

8.1 The Supplier must inform the Contracting Authority of any possible issues within the supply chain throughout the Contract as and when they occur, within forty-eight (48) hours of the Supplier being made aware of them.

9. VOLUMES

9.1 The volumes for this requirement are outlined in Section 6 – The Requirement.

10. CONTINUOUS IMPROVEMENT

10.1 The Supplier will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.

10.2 The Supplier should present new ways of working to the Buyer during regular Contract review meetings.

10.3 Changes to the way in which the Services are to be delivered must be brought to the Buyer's attention and agreed prior to any changes being implemented.

11. SUSTAINABILITY / SOCIAL VALUE

11.2 Not applicable.

12. QUALITY

12.1 Quality shall comply with those set out in this Bid Pack and in line with the Call Off Terms and Conditions

13. PRICE

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Subscription	Unit Price	Quantity	Value	Subtotal
Gearset Automation Teams	REDACTED TEXT under FOIA Section 43, Commercial Interests	REDACTED TEXT under FOIA Section 43, Commercial Interests	REDACTED TEXT under FOIA Section 43, Commercial Interests	REDACTED TEXT under FOIA Section 43, Commercial Interests
Data Backup Teams	REDACTED TEXT under FOIA Section 43, Commercial Interests	REDACTED TEXT under FOIA Section 43, Commercial Interests	REDACTED TEXT under FOIA Section 43, Commercial Interests	REDACTED TEXT under FOIA Section 43, Commercial Interests
Gearset Enterprise *	REDACTED TEXT under FOIA Section 43, Commercial Interests	REDACTED TEXT under FOIA Section 43, Commercial Interests	REDACTED TEXT under FOIA Section 43, Commercial Interests	REDACTED TEXT under FOIA Section 43, Commercial Interests
Sandbox Seeding and Compliance	REDACTED TEXT under FOIA Section 43, Commercial Interests	REDACTED TEXT under FOIA Section 43, Commercial Interests	REDACTED TEXT under FOIA Section 43, Commercial Interests	REDACTED TEXT under FOIA Section 43, Commercial Interests

14. STAFF AND CUSTOMER SERVICE

14.1 The Supplier shall provide a sufficient level of resource throughout the duration of the Contract in order to consistently deliver a quality service.

15. SERVICE LEVELS AND PERFORMANCE

15.1 The Buyer will measure the quality of the Supplier's delivery by:

15.1.1 Please provide information of the required service levels and/or KPIs that the Potential Supplier will be expected to achieve and against which the

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Supplier's performance will be assessed. Ensure that service levels are measurable, relevant, and drive contractual performance. Please insert in text and include SLAs/KPIs in table form.

KPI/SLA	Service Area	KPI/SLA description	Target
1	Delivery Timescales	Delivery Timescales are to be made in line with the Contract Milestones outlined in Section 7.	100%
2	Service Delivery	All critical Support calls and email acknowledged and resolved same day of raising by the Support Service Provider	98%
3	Service Delivery	All escalated issues will be resolved by the Support Service Provider within twenty-four (24) to forty-eight (48) hours.	98%
4	Service Delivery	Availability	99.7%

16. SECURITY AND CONFIDENTIALITY REQUIREMENTS

- 16.1 Data Encryption: "metadata and data is to be encrypted at all times, both in transit and at rest."
- 16.2 Intrusion protection: 24/7 IDP service maintained.
- 16.3 Regular Pen tests taking place (CREST accredited)
- 16.4 ISO 27001 certified
- 16.5 Data Protection/Privacy: UK GDPR Data Protection Act, EU GDPR, and the CCPA compliant
- 16.6 Hosting in EU (Ireland) AWS infrastructure (inline with Salesforce itself)

17. PAYMENT AND INVOICING

- 17.1 Invoices should be submitted to: REDACTED TEXT under FOIA Section 40, Personal Information

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18. CONTRACT MANAGEMENT

18.1 Attendance at Contract Review meetings shall be at the Supplier's own expense.

19. LOCATION

19.1 The location of the Services will be carried out remotely.

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