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# Salesforce Implementation Partner Services at Wythenshawe Community Housing Group

# Appendix B – Service Specification

**Procurement Reference: 585**

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## Overview & Summary of Requirements

Wythenshawe is 8 miles south from Manchester City Centre and is home to c79,000 residents with 45% of these people in Wythenshawe being housed by Wythenshawe Community Housing Group (WCHG). There are many positive aspects to Wythenshawe which for many years has been improving as a place to live and work. WCHG owns and manages circa 14,000 homes across Wythenshawe.

Listed below are some high-level business requirements to set the scene for our ambition in implementing a Salesforce platform as the basis of our Single Pane of Glass Solution. We are seeking a high-quality Salesforce partner to assist us on our transformation journey. We are looking for a true partnership, leveraging business consultancy skills alongside technical skills where we can collaborate and share ideas and knowledge.

Alongside this project, WCHG will also be procuring Salesforce licenses which will be completed by 1st August 2023.

In recent months, WCHG have undertaken a proof of concept project to implement Salesforce for the organisation’s Customer Feedback process. Following this proof of concept, it is the intention for WCHG to implement Salesforce further across the organisation.

Below are some of our headline objectives/requirements to give context to the work required:

### Case Management and Process Automation

* The core business systems portfolio should operate within a fully integrated workflow environment to support the management and control of business-related cases and situations. For example:
  + The system should automatically alert the appropriate manager when a service request has been raised via the customer hub, whether the customer has made contact via phone, email, or the customer app/portal.
  + The case should contain all the information provided at the case’s entry point, allowing the relevant manager to pick it up and carry out the next steps.
  + The system should support the progression of the case through a defined set of statuses, tailored to support the processes of the specific business area, triggering the issue of standard letters / emails / alerts as appropriate when case milestones are reached.
  + All information relating to the case and correspondence shared with the customer should be tracked and logged against the case in the system, and this information should be visible to colleagues in the relevant business area as well as colleagues from the customer hub team, ensuring that they are able to provide updates to the customer where required.
  + The system will allow the configuration of service level agreements (SLAs), with alerts to be sent to assigned colleagues and their managers where SLAs are approaching or not met, by means of a RAG status function. This will ensure that cases are managed in line with customer expectations and allow colleagues to manage their workload according to the RAG status of their assigned cases.
  + Customers will be informed about case progression / events via their preferred communication channel, which may include automated text messaging, notifications via the tenant app, and e-mail alert transmissions.
* Workflow facilities will support the definition, modelling, implementation and execution of key business processes and business rules and will enable colleagues to become more proactive in the activities that they are expected to undertake, using personal and correspondence notes and auto-alerts arising from diary and task entries. This level of automation is in no way intended to reduce colleague skill requirements. If used correctly, it will provide WCHG colleagues with tools to determine actions and timescales, enabling them to make more effective use of their time and manage delivery against defined service levels.
* The workflow solution should also facilitate ‘joined up working’ with key business partners, for example WCHG’s internal service areas and Contractors, as appropriate.
* Managers should be able to monitor and manage workload ‘queues’ or distribute workflow items within pre-defined permissions/parameters.

### Data Quality & Reporting

* Suppliers’ delivery and proposed model must allow the business the opportunity to improve accuracy of existing data, or be able to validate data upon initial import and future manual & system entry. We strive for high quality data to allow the business to provide a high quality of service, any example of this would be advantageous.
* The system needs to provide a high-quality suite of reports alongside an intuitive platform to modify and create new reporting information. The system should take the form of historical traditional reporting interactive dashboards for live decision making with drill through and historic reports for trend analysis. The system should also allow external connection to other reporting tools such as PowerBI.

### Field Services and Remote System Access

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* The system should provide remote access from any location on any device for a range of worker types including neighborhood and ASB officers, repairs operatives and members of the community development team, allowing customisation of forms, workflow and capability.
* Provide Field Service Analytics for managers, with real-time visibility into operational performance, from any location.
* Deliver customer notifications and updates through email, SMS and a customer portal/app.
* Provide or integrate with dynamic scheduling systems.

### Omnichannel Services for Customers

* At WCHG, we are making a proactive effort to improve our digital offer to our customers. We require a range of digital services for our customers across the web and app stores, delivering high quality experience and functionality. Ease of use is key to ensure adoption based on quality of experience. For example, customers should be able to self-serve by updating their personal details and booking repairs using digital platforms.
* Customer contact approach should be integrated, omnichannel and make the involved platforms such as webchat, customer portal and contact centre solution accessible from anywhere. This should include but not be limited to; social media, SMS and WhatsApp channels - adoption of customer preferred channels on the platform, offering native integration and use. The solution must integrate with our unified communications platform to provide an end-to-end omni-channel experience for WCHG’s customers, tracking communication from all channels against the customer’s record, and allowing contact to be made directly from the case management / CRM solution.

Contact Relationship Management

* The system should be based on a powerful CRM platform allowing WCHG to manage customer interaction and requests, ensuring high performance, managing expectations and meeting service promises through systems-based SLAs and escalation.
* A 360-degree view of the customer is a fundamental requirement. The system needs to be able to interact and integrate with other systems (including but not limited to unified communications and dynamic scheduling tools), to achieve that aim at the right level. For example:
  + When a customer calls into the customer hub, a screen pop should be provided showing information about the customer and services for which they are eligible (e.g. whether leaseholder or tenant).
  + Information about the customer’s recent services and interactions with WCHG should be visible to the contact centre agent so that they are able to use this information to tailor their response to the customer’s request.
* Customer contact needs to be supported by powerful, intuitive, and easy to develop workflow processes to ensuring full visibility of process delivery visible to colleagues, the customer and supporting contractors. SLAs, escalation, and workflow management are inherent requirements.

* CTI (cloud telephony integration) with Salesforce is a key deliverable and partners need to demonstrate their competency and experience in this type of integration.
* MS Teams integration allowing for calls to be transferred from the Salesforce client to WCHG colleagues using MS Teams

### Integration

* We require features and options in terms of integration to allow the platform to coexist with current systems such as Orchard housing management (MRI), Promaster asset management (MRI) and MS Dynamics. Demonstration of pre-existing integrations with the rationale for approach is key to allow us to fully assess the viability of the platform. The extent of integration is dependent upon a full understanding of the platform and the workloads it could carry. This balance is expected to shift over time as use of the platform matures, and functionality is migrated away from current systems to the new platform.

# Detailed Contract Requirements

* + Following our initial Salesforce proof of concept, we are now seeking a Salesforce-accredited partner to collaborate on our planned business transformation. The scope of the project is an iterative replacement of legacy functionality with Salesforce based solutions. There is a necessity to avoid a big bang approach so partners need to deliver a scalable integration that will flex as the project progresses, maintaining a 360-degree view of the customer. The ultimate ambition is to build our full tenancy, asset, and compliance data model inside Salesforce, including data and functionality relating to WCHG’s sales division (Garden City Homes).
  + We are seeking partner services on the wide range of Salesforce technology including but not exclusive to the implementation of Salesforce CRM (Service/Sales Cloud), Salesforce Field services, Salesforce Shield, Digital engagement, etc.
  + Expected benefits from the Salesforce implementation include:

1. Agile – A fully agile implementation approach to facilitate change in line with changing business priorities.
2. Adaptability – A low-code / no-code solution that will allow adjustments and changes to be made by non-technical colleagues with user-friendly mobile and offline access.
3. Reporting – Delivered reports and dashboards negating any manual creation required to fulfil reporting requirements. Also allows a comprehensive view of case and officer activity.
4. Service Level Agreements – Built-in service level management to measure and alert on customer service promises.
5. 360 View of the customer – Complete view of all customer activity on one screen, including, calls, email, SMS and WhatsApp. Required updates automatically added in Orchard.
6. Case assignment – Ability to self-manage cases and reassign as needed with the task management approach to suit different teams and case types.
7. Case creation – Cases can be created via several entry points including but not limited to web to case, email to case, agent created.
8. Data protection by design and default – Previous systems had limited functionality to support GDPR compliance. We require Salesforce and any implementation partner to comply with the GDPR and support compliance with outcomes such as the data protection principles (e.g. data accuracy, data minimization, data security etc.) and data subject rights (e.g. access, deletion, restriction, portability etc.).
9. Data Quality – Increased data quality with data field validation and process validation, i.e., cannot close a case without adding key details and the master system acting as a single source of truth.
10. Automated customer comms - Notifications are automated via email / SMS / customer app to ensure customers are kept up to date, removing manual communication processes.
11. Outlook Integration – Emails can be viewed as part of Salesforce cases from Outlook; with the ability to track all email communication against the relevant case.
    * Our requirements are not limited to the above list and a key outcome of the partnership is to work together to confirm the overall Salesforce implementation roadmap and delivery timetable.

### Timescales and Project Plan

Appointment as our Salesforce partner is expected to match the transformation programme of 3 years. WCHG reserves the right to work with multiple Salesforce Partners if required throughout the duration to ensure a successful implementation.

Service providers will be expected to supply a 3-year cost model in no. of days providing clarity of all charges over the life of the contract.

Both cost model and project plan should be aligned with our planned phased approach to a 3-year delivery. Any risks or concerns related to delivering the project according to WCHG’s phased timeline should be highlighted. Where the partner feels a difference to the current phased timeline would be necessary, this should be presented in the project plan with justification for the suggested changes.

Please refer to the proposed 3-year phased implementation plan below:

|  |  |  |
| --- | --- | --- |
| **Phase** | **Business Area** | **Timeline** |
| Phase 1 | Customer Hub & Customer Self-Serve Capabilities | August 2023 – March 2024 |
| Phase 2 | Housing Services, incl. Sales & Development | March 2024 – September 2024 |
| Phase 3 | Repairs & Property Services | September 2024 – September 2025 |
| Phase 4 | Back-Office Functionality | September 2025 – March 2026 |

The project plan must include knowledge transfer to members of the WCHG IT department to support future in-house configuration and maintenance of the Salesforce platform. We will also require an outline of training approach and training materials to be included.

**Mandatory Requirements**

* WCHG requires suppliers to have delivered previous Salesforce implementation programs across the housing sector
* WCHG has determined that organisations must be registered in the UK and on Shore to deliver the requirements detailed within the specification
* As part of the delivery of Salesforce implementation, WCHG require suppliers to deliver service on site at Wythenshawe House and further details will be agreed with the WCHG contract manager as part of the pre-contract process