

# Specialist Cloud Services Lot 4 Cloud EDRM Consultancy Services

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## 2 Transcend360 Introduction

### What does transcend360 deliver?

transcend360 Ltd (T360) provide independent consultancy services specialising in print and document services outsourcing. We provide consultancy that supports customers in the definition, acquisition, delivery and management of an outsourced print and document service, providing support throughout the full contract lifecycle.

Our offering is completely customer centric, designed to support the most efficient and effective service delivery and we are not linked to any specific service provider. Through a range of consultancy services we can work with the Customer to ensure the full benefits are realised from an outsourced cloud based service.

### What's happening in today's cloud market?

Many organisations are exploring the new options that cloud based services can offer. The use of the cloud to provide Electronic Document and Records Management (EDRM) is still relatively immature when compared to other areas. Many of the traditional suppliers of EDRM solutions are only just beginning to offer their solutions as cloud services. As many organisations are not familiar with what is available they will often look to the service providers to lead and provide guidance. This can lead to transfer of control from the Customer to the service supplier. T360 enable the Customer to remain in control of the engagement, ensuring the Customer gets what they want and not what the service supplier wants to sell.

T360 are not aligned to any of the service providers on G-Cloud 7. This ensures that our services are technology, service and supplier independent and are focussed on the outcomes required by the customer to deliver the expected benefits of the cloud based service.

### Our services

T360 offer a range of Specialist Cloud Services based on the ITIL Service Lifecycle. The services available via G-Cloud 7 are:

- Cloud Printing and Imaging Consultancy Services
- Mobile Print Consultancy Services
- Cloud Fax Consultancy Services
- Cloud EDRM Consultancy Services

Each of these services includes options that provide support, assurance and guidance throughout each of the 5 stages of the ITIL Service Lifecycle:

- Strategy
- Design
- Transition
- Operation
- CSI

### Our capability

T360 have professionals who have many years experience in the IT, print and document management industry. We have experience of working in some of the worlds leading IT service providers and print vendors. We are passionate about delivering quality that ensures our Customers realise the full potential of their cloud services and achieve real value for money.

**The cloud offers new opportunities to deliver secure on demand document management services**



We have significant experience in:

- IT service delivery
- Print technology
- Project design, delivery and operation
- Project management
- Change management
- Service management

T360 have staff that are skilled and accredited in Prince2, APM, ITIL, Lean Six Sigma and CDIA. In addition, we have industry / sector specific experience and knowledge.

T360 offer a range of services that are based on three core values:

#### **Customer focus**

T360 focus on what the Customer requires, not on what any specific supplier wants to sell.

#### **End to end full service lifecycle support**

T360 provide services that support the definition, acquisition, delivery and management of cloud print and imaging services and therefore provide support throughout the complete service lifecycle and full contract period.

#### **True Independence**

T360 do not provide hardware, technology, or any other component of the service and are not aligned to any manufacturer or provider of products and services. This ensures that all elements of the engagement focus on the customer's individual requirements.

## **3 Service overview**

### **3.1 Service introduction**

In the past enterprise level EDRM platforms had a high cost of entry as organisations had to consider a wide range of business and technical issues during their implementation. These issues included:

- Business and functional requirements
- EDRM solution selection
  - Functional support
  - Infrastructure support
- EDRM solution infrastructure requirements
  - Servers
  - Database
  - Storage
  - Network
- Deployment and migration
- Operation

This level of complexity and high capital investment prevented many organisations implementing EDRM, even though the benefits would be significant.

Recently however the introduction of cloud based EDRM services has provided an alternative option that can negate many of the challenges previously associated with the introduction of these services. The benefits of a cloud EDRM solution include:

- Limited capital investment and lower cost of entry
- Leverage existing IT infrastructure
- Agility and scalability
- On demand and mobile access
- Rapid implementation
- Reduced support and management costs

**Cloud EDRM enables the organisation to focus on the business and not the technology**



Many of the traditional enterprise class EDRM platforms are now available as a cloud service via SaaS or PaaS. This enables organisations to access the benefits of EDRMS without the headache of running the infrastructure.

This does not mean that the deployment of EDRM is simple or painless, it simply means that the issues the organisation needs to focus on have changed and move from the technology to the business i.e. understand what the business needs and the functionality required. This change in focus allows the organisation to concentrate on the business processes that must be supported rather than the technology required to deliver it. Selection of the right EDRM is still critical but now the focus is on the functionality rather than technical specification.

A cloud based EDRM does however introduce its own set of issues to be considered including:

- Security
  - Access control
  - Data security during transmission and storage
  - Information governance - holding important, confidential and sensitive data 'outside' the organisation.
- Access to services i.e. network infrastructure and access

Overall, cloud based EDRM offers a cost effective method for organisations to actively manage their document resources.

## 3.2 Service description

T360 offer a range of consultancy services based on the ITIL Service Lifecycle supporting the introduction and operation of cloud based fax services:

- Service strategy
- Service design
- Service transition
- Service operation
- Continual service improvement

### 3.2.1 Service strategy

If an organisation has a Cloud Strategy does this include cloud based EDRM services? All organisations should consider the following for all their cloud services:

- Ownership and responsibility
- Business requirements at a strategic, tactical and operational level
- Maintaining, managing and developing services

T360 work with key stakeholders to understand the business and its requirements, and translate this into a meaningful strategy focussed on delivering business value. We can provide:

- 360 analysis of the business including business strategy and technology alignment
- Operations and process review
- Strategic roadmap development – prioritised list of projects and deliverables
- Recommendations for monitoring progress

To support the development of the cloud service strategy T360 deliver assessment, analysis and advice based on the three strategic questions;



“where are we now?”  
“where do we want to be?”  
“how do we get there?”

T360 typically will work with the customer, helping them to carefully think through possibilities, understand costs, recognise interdependencies, review risk, and ultimately select the right strategic direction. Strategic discussions are translated into meaningful document(s) that are accessible to users across the business, ensuring everyone understands the reasoning and objectives behind the strategy.

We have experience of the development of document and communication strategies across a wide range of organisations. Our team are able to use their experience and industry knowledge to help the Customer develop a strategy that is realistic yet innovative and enables the Customer to implement cloud EDM services.

The critical benefit of having a strategy is that it will ensure that an organisation has a clear view of where it wants to go together with a path defining how to get there, and can therefore focus resources on projects that deliver maximum benefit to the business at the lowest cost whilst minimising risk.

### 3.2.2 Service design

Service design explores business requirements and develops services which meet the business demands.

When designing new or improving existing services T360 consider all elements relevant to service delivery; we don't just focus on the technical solution. We focus on building complete solutions that are aligned with the IT Strategy and fully support the business.

The key first step in the design process is to understand and fully document the business requirements and drivers i.e. establish the need. T360 have consultants experienced in Business Analysis and consider the organisations requirements from five perspectives:

- Strategic
- Tactical
- Operational
- User
- Financial

T360 capture and structure information using a range of methods including electronic data capture, questionnaires, interviews and workshops. We believe it is critical at this stage to challenge the norm as simply recreating existing internal services in the cloud is unlikely to be the best long term solution. The service design stage is the ideal opportunity to improve business processes.

We take the output of the requirements analysis and based on the four P's of service design (people, processes, product/technology and partners/suppliers) develop a full Service Design Package. The package will include some or all of the following:

- Business requirements
- Service design and specification
- Service level requirements
- Service acceptance
- Organisational readiness
- Dependencies and resources

**'Challenge the norm'  
mirroring existing  
document workflow  
in the cloud is  
unlikely to be the**



T360 recognise that service design is a balancing act:

- more complex services and/or higher service levels come at a cost
- resources are likely to be limited
- organisational readiness may limit the amount and timescale for change

T360 consider these issues and ensure the final solution is an optimal balance to meet the business requirements within the identified constraints, ensuring that the proposed design is deliverable and will in turn deliver the expected benefits.

### 3.2.3 Service transition

Service transition takes the service design and moves it into an operational state. T360 offer three distinct but clearly related services within this phase:

- Service Procurement
- Service Deployment & Project Management
- Change & Transformation Management

#### *Service Procurement - service specification and selection*

Procurement of a cloud EDRM solution should focus on the functionality and services the solution can provide to the organisation and not on the underlying technology. During supplier selection it is key that these requirements are clearly and fully documented in the service specification. This enables both the supplier to propose a suitable solution and the customer to effectively evaluate all options.

We typically go through a 5 stage process when supporting the procurement of a service:

- Define and document the business and technical requirements
- Translate the requirements into a service design and specification
- Produce procurement documentation e.g. RFI / RFP
- Support supplier selection
- Negotiate the contract

It is critical when procuring cloud services to ensure that the requirements are clearly and unambiguously defined as any uncertainty in the specification and associated procurement documents may well lead to conflict during the deployment and operation of the service.

Selection of the right service and service partner is not a simple matter of price, or even a simple comparison of specification and price between alternative suppliers. There are many factors that impact on the viability of a proposal and T360's consultants are experienced in working with Customers to define an agreed evaluation model and then applying this model to supplier proposals.

Once a preferred bidder has been selected we can support or lead the negotiation and contracting phase, ensuring that the final solution and contract documentation fully define what is to be delivered.

T360 are able to lead or support the full procurement process making complex procurement simple and effective by working as part of your procurement team. We have market specific experience and provide a truly Independent and unbiased service acting entirely on behalf of the Customer enabling them to remain in control of the procurement process plus ensure that the selected service provider can deliver the services required.





### *Service Deployment & Project Management*

T360 provide practical project management services that support the deployment of cloud EDRM services, ensuring successful delivery on time and on budget.

We have developed our own project management methodology blending standard Project Management methods such as PRINCE2 with industry specific experience to develop a project management methodology tailored to the unique demands of implementing cloud print and imaging services.

We have a library of best practice documents based on the delivery of many print related projects. These include PID's, logs & registers, project plans and project reports. However, it cannot be overstated the importance of practical project management experience of the deployment of print services; generic project management skills alone are not enough to ensure a smooth roll out of the cloud service. T360 are able to provide professional project management expertise enhanced with industry specific skills and experience.

Our hands on consultants have highly developed communications skills and can work at all levels within the Customer ensuring full stakeholder engagement and buy in.

We are also able to provide resources experienced in project recovery if an in-house project is beginning to fail, or requires additional resources and support to keep on track.

T360 are able to ensure that the project is delivered successfully and to agreed timescales and costs, but more importantly that the service meets the defined requirements of the organisation.

We also recognise that the Customer's EDRM services are part of a more complex IT ecosystem. To support this we have experience of working in multi-sourced environments managing all services using SIAM principles.

In addition to project management support, T360 can provide specialist technical resources to support the deployment of the service. We have consultants highly skilled in a wide range of print related products and services and are industry recognised subject matter experts.

**T360 have a unique mix of project skills and industry specific experience**

### *Change & Transformation Management*

Implementing cloud EDRM services is more than just simple project delivery. The EDRM service will have a profound impact on business processes and therefore the business as a whole. A cloud based EDRM **will** fundamentally affect the way the business and users operate. This change needs to be managed to ensure a smooth deployment and acceptance across the organisation. Without this acceptance it is unlikely that the full benefits of the service will be realised and perhaps worse still end user productivity can go down as business processes are disrupted.

Implementation of a successful service requires a change management programme including vision and strategy, change leadership, communication programme and embedding the changes into the organisation. Based on our industry experience, T360 work with the Customer to create a complete and comprehensive change programme that deals with each of these areas and is adapted to the specific culture and capability of the Customer ensuring benefits are realised and change embedded within the organisation. T360 have developed a library of communications media that have been used and refined in numerous implementations.

T360 understand the unique changes that a cloud based EDRM service will have on an organisation, we can manage the change to ensure that everyone understands the change (and the reason for change).





### 3.2.4 Service operation

The requirement to manage the service does not stop once the service has been fully implemented and is operating (or BAU). The focus shifts from implementation to Service Assurance (SA). SA ensures that the service being delivered to the organisation meets its requirements and any supplying partner delivers on their agreed contractual obligations; including delivering to the Service Level Agreement (SLA) requirements.

T360 offer a range of three services to support cloud based print and imaging throughout the service operation phase of the Service Lifecycle:

- Service level management
- Demand and change management
- Benefits realisation

#### *Service level management*

Services and service suppliers do not manage themselves and it is important that the Customer remains in control of service delivery and actively manages the supplier. T360 have experience of managing services using SLAs and service level reporting. Our approach to active management ensures that the Customer remains in control and drives the contract, ensuring that the service supplier delivers the expected service quality and service levels to enable delivery of the expected benefits.

We can support Service Review Meetings ensuring that the customer drives the service contract and is gaining the full benefit of the service. Where remedial activities are required we can ensure that agreed actions are suitable and are fully implemented to agreed timescales. Overall our service ensures that the customer controls and manages the service to fully gain the expected benefits.

T360 can also support contract recovery. There are many examples of Customers not fully receiving the services they expected from a service provider but then being unable to fully resolve the issues. Typically the service supplier is controlling the relationship and it can be difficult to prove they are not delivering to the requirements defined in the contract and SLA. T360 can work with you to bring the contract back under your control.

#### *Demand and change management*

No organisation remains static. Large public sector organisations are dynamic and are influenced by a complex range of internal and external factors. It is vital therefore that the services develop in line with the changing requirements of the Customer. Indeed one of the main benefits of a cloud service is its inherent agility and scalability. But this flexibility needs to be actively managed through a robust change control process to ensure that the service can meet business demands and changes are fully controlled. T360 have experience of managing the delivery of services, ensuring that they remain in line with the Customer's needs and any changes are implemented in a controlled and sustainable manner.

#### *Benefits realisation*

Achieving the full benefits available from a cloud service requires active management and investment of Customer resources. It is not unusual for service delivery teams to focus on managing the delivery of the service and

**Cloud services are inherently agile and flexible – but flexibility needs to be managed through vigorous change control**



lose sight of delivering the benefits of the service to the business. T360 can work with the Customer to ensure that benefits are fully realised.

### **3.2.5 Continual Service Improvement**

Continual Service Improvement (CSI) goes beyond basic Service Assurance and looks to ensure that the service is continually reviewed and opportunities to improve the service are identified. The key issue facing the Customer is simple, will a supplier really want to identify improvement opportunities that drive out benefits for the Customer unless they also generate further revenue and/or profit for them?

T360 can support the following CSI services:

- Review management information, identify improvement opportunities and develop improvement programmes
- Present options and recommendations for implementing improvements
- Help evaluate and prioritise improvement opportunities
- Support delivery of improvement projects

The goal is to ensure that the service not only delivers the benefits expected but continues to develop in line with your business objectives, delivering increasing benefits to the Customer.

## **4 Information assurance**

This service is not appropriate for assurance as the service is part of Lot 4 Specialist Cloud Services.

## **5 Backup / restore and disaster recovery**

This service is not appropriate for backup / restore and disaster recovery as the service is part of Lot 4 Specialist Cloud Services.

## **6 Data restoration / service migration**

This service is not appropriate data restoration / service migration as the service is part of Lot 4 Specialist Cloud Services.

## **7 On-Boarding Process**

T360 have access to wide range of skills and resources and can on board off board resources to meet Customer demands. Key to the delivery of all our services is working with the Customer to agree the project scope and produce a full Statement of Works before beginning the project.



## 8 Technical Requirements

There are no specific technical requirements for the delivery of the services.

## 9 Service delivery

### 9.1 Service Management

As part of the project setup T360 will work with the Customer to agree the following:

- Statement of Work
- Project Plan
- Reporting and governance requirements

Regular communication between T360 and the Customer is fundamental to ensuring that all work is completed to agreed timescales and standards.

### 9.2 Service Constraints

Not applicable.

### 9.3 Service Levels

As part of the project setup T360 will agree with the Customer a full Statement of Work that will define the Deliverables, associated timescales and quality measures. This will include agreeing the scope of any specific service level requirements such as 'out of hours' activities.

### 9.4 Training

T360 can provide relevant training services as defined within the agreed Statement of Work for the project.

If no specific training services are defined within the Statement of Work, T360 will agree with the Customer a process for knowledge and skills transfer to the Customer.

### 9.5 Delivery assurance and governance

T360 apply standard governance processes to all projects to ensure that agreed objectives and deliverables are provided on time, to the quality expected by the customer and within agreed budgets.

Key to this is working with the Customer to agree a full Statement of Works prior to the commencement of the main project.



## 10 Commercials

### 10.1 Pricing

For the services outlined in this document the standard T360 SFIA rate card will apply.

Based on the services agreed with the Customer and documented within the Statement of Work T360 and the Customer will agree the appropriate SFIA level and target number of days required to provide the services agreed.

Price discounts are available as defined in 't360 G-Cloud 7 SCS Pricing v1.pdf'.

### 10.2 Terms and Conditions

The full Terms and Conditions can be found in 't360 G-Cloud 7 SCS Terms and Conditions v1.pdf'.

### 10.3 Ordering Process

T360 and the Customer will follow the process documented in the Framework Schedule 3 Ordering Procedure.

As part of the ordering process T360 will work with the Customer to fully document the services to be provided within a Statement of Work.

### 10.4 Invoicing Process

The Invoicing process is described in the Terms and Conditions (t360 G-Cloud 7 SCS Terms and Conditions v1.pdf).

T360 will issue a monthly invoice at the end of each month during which any project activity has taken place. The invoice will include details of all activities relating to the monthly charges e.g. number of days.

If required T360 will agree with each Customer other supporting documentation to be provided in support of the invoice e.g. time sheets.

### 10.5 Trial Services

T360 do not provide trial services.

### 10.6 Termination Terms

Termination terms can be found in 't360 G-Cloud 7 SCS Terms and Conditions v1.pdf'.

### 10.7 Financial recompense

T360 do not offer any 'service credits' with this service.

In accordance with the G-Cloud 7 Framework Terms and Conditions, the customer may terminate the contract at any time by giving at least 30 working days notice in writing.



## 11 Customer Responsibilities

General Customer responsibilities can be found in 't360 G-Cloud 7 SCS Terms and Conditions v1.pdf'.

T360 and the Customer will define any specific customer responsibilities within the project as part of the Statement of Work. These will be project specific but may include:

- Customer participation and support e.g. staff resources
- Access to Customer premises and provision of facilities
- Access to Customer staff and resources
- Approval of deliverables to agreed standards and timescales
- Project governance

