Chess Digital

Service Definition of Data Visualization & Analytics, Umbraco, SharePoint and Microsoft365 Consultancy Services, Co-Pilot and Web-based Consultancy Services

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Contents

1 About Chess Digital

Developing meaningful and innovative solutions that serve our clients begins with gaining deep empathy for their needs, goals and aspirations for the future. Chess Digital's design methods enable our teams to gain a profound understanding of the business and people they are designing for, to challenge assumptions and to inspire innovation.

1.1 Our Services

Chess Ltd employs over three hundred people. Our client's contract with Chess Digital Ltd, the software integration and professional services division of the company. We hold five Microsoft Solution Designations and three specialisms.

- Infrastructure Azure

- Modern Work

    o Calling for Teams Specialism

    o Teamwork Deployment Specialism

- Data & AI Azure

- Security

    o Identity and Access Management Specialism

- Digital and App Innovation Azure

Our solution focus within the Microsoft technology stack includes: -

- Vertically integrated software solutions developed utilizing the .NET Framework.
- Securing effective client management portals.
- Creation of effective, time sensitive reports and dashboards.
- Productive mobile solutions aligned with innovative data capture techniques.
- Leveraging document management and collaboration techniques.
- The delivery of a compelling people's experience.

1.2 Our Client Relationships

From the outset, we work with the business leaders and end users to create an environment and context from which rich, meaningful Business and Functional requirements can be elicited, synthesized, and captured. Having undertaken this process, which should be engaging and exciting, clients are more likely to 'own' aspects or all the requirements allowing us to take on the role of partner as opposed to the supplier.

Chess Digital's client base is diverse and operates across a range of industry sectors as we provide appropriate, effective, value-added integrated systems and solutions to our clients. We propose an approach and methodology that leverages our experience and success in systems development.

1.3 Our Approach

Chess Digital adopts a design-driven approach to the development of software solutions. 'Design' in this instance does not relate purely to the visual aesthetics of a product or service, but to the approach adopted when problem-solving throughout the continuous development lifecycle.

Our offer is focused on creating an open environment reflecting a flexible, iterative delivery model based on priority functionality to the business that integrates current mobile, collaboration and social communication techniques with appropriate third-party solution toolsets.

2 Umbraco – Content Management System

Umbraco is a comprehensive web content management system, which has deployed a subscription model to the Microsoft cloud. Chess Digital's Umbraco Consultancy Service is based on Umbraco-as-a-Service (UAAS), it is ideal for any organisation who would like to focus on creating compelling website and intranet content experiences. We concentrate on designing, building, deploying, and supporting colorful systems. UAAS is one of the most scalable and full-featured Content Management System based on the Microsoft cloud. With a host of add-ons and integration with third party tools, your site can have the functionality suited to your requirements.

Chess Digital is aligned with Umbraco's latest strategies for online development. Our overall focus within the Umbraco platform encompasses:

- Securing effective public facing websites, portals and intranets.
- Leveraging document management and collaboration capabilities.
- Creating mobile solutions aligned with data capture techniques.
- Focused on the delivery of a compelling end user experience.

2.1 What we offer

With over 26 years of expertise and experience in software development, we can provide consultancy services to deliver great site experiences for your target audience. Our consultancy package extends beyond advisory services in that we create bespoke solutions tailored to your digital strategy.

- Our dedicated Creative Team can create compelling public facing website experiences for your target audience, such as awareness campaigns, learning hub, idea forums and community sites.
- Our team of Umbraco developers can build the foundations for your site, empowering you to easily input the content you require.
- One of our differentiators is our specialism across the Microsoft stack, which means we can easily integrate your Umbraco site with Microsoft's intranet solution SharePoint and Customer Relationship Management systems, harnessing the full advantages of each solution.
- Our Support service can provide a peace of mind for your organisation, you will not to worry about the risks when things don't go as planned.

2.2 Service Features

2.2.1 Extensibility and Integration

Umbraco's editing and content creation tools are customizable. You no longer have to feel restricted with changing the way you work to fit in with systems. At Chess we can help you customize any of Umbraco's features to match your objectives.

2.2.2 Powerful and Easy-to-use Interface

The Umbraco platform is intelligently intuitive which appeals to many non-developers or designer users. Users will be confident in using Umbraco, they can spend little time required to learn new technology, enabling them to invest more time in focusing on more important

tasks.

2.3 Web Content Management

Umbraco's features enable content authors to create a site structure using a combination of 'publishing sites and pages. As part of the Analysis and Specification Phase Chess Digital would consult with you to define the required page layouts and content types to ensure support for all the artefacts that are to be surfaced on the pages, e.g. links to external sites/systems, calendar controls, web parts, links to forms/documents.

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3 M365 Consultancy Services

Chess have worked with the Microsoft stack for over 25 years and have built up wide and varied portfolio of clients where we have engaged and provided solutions to. We have honed this offering down to following areas.

3.1 Analysis & Governance

Chess Digital is a vocal proponent of planning in all software builds. Our advice is to invest in the Analysis phase, allowing the foundations of the build to be created and a reference document we can always refer to. The scope of the work follows from the reference work.

The foundation of a successful software build is Governance. Chess Digital specializes in the creation of information architecture that matches the remit of the business strategy.

3.2 Design Authority

Chess follows a process within our project work to establish a Design Authority to approve the technical design of new systems.

The role of the Design Authority will be to ensure the integrity of the information architecture; ensuring that new and upgraded systems are fit for purpose and comply with the standards necessary to maintain a robust, consistent, and integrated technical infrastructure.

A Design Authority will be established in order to:

- Develop, promote, and control standards for IT systems, thereby reducing costs associated with duplication and integration of heterogeneous applications.
- Quality assure IT requirements to allow projects to develop a clear set of deliverables backed up by a design that is achievable and fit for purpose.

The group's role will be to:

- Develop, maintain, and communicate a set of technical standards that support the clients' IT activities
- Participate in pre-business-case reviews and high-level project design activities to ensure alignment with standards.
- Approve compliance with or variance from the standards for all IT projects, across the clients' interconnected systems.

The remit of the Design Authority lies across the technical architecture that supports the system development process.

3.3 Business Analysis

Chess Digital incorporates Business Analysis as a research discipline to help identify business needs and to determine appropriate solutions to business problems. Solutions often include a systems development component, but may also consist of process improvement, Organisational change or, strategic planning and policy development.

Chess has several consultants within the business who specialise in this area.

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Chess's Business Analysts are well-versed in analysing the strategic profile of client organisations, advising senior management on suitable policies, and the effects of policy decisions.

3.4 Architect

Client organisation's often need to introduce change to solve business problems, which may have been identified by the strategic analysis, referred to above. Chess's Business Analysts contribute by analyzing objectives, processes, and resources, and suggesting ways by which re-design, or improvements could be made.

Three elements are essential to this aspect of the business analysis effort: the redesign of core business processes; the application of enabling technologies to support the new core processes; and the management of Organisational change.

3.5 Design and Development

Chess utilizes approved agile development methodologies which are reviewed on an ongoing basis along with emerging methodologies to ensure we are following best practice and deliver the most appropriate options to our clients.

The iterative and incremental nature of Agile development ensures a very open, transparent and "no surprises" approach to delivery; the focus is on on-going visibility of development progress and enabling appropriate prioritization of requirements assuring only the most valuable features are continually being delivered. Chess's experience is that software development projects implemented using an Agile methodology have reduced delivery risk.

The goal of the initial Design phase is to define how the business requirements will be implemented. This includes consideration of the overall solution, technical and integration architecture and the planning and estimating of the work and costs for the design and development of specific systems, data element finalization, and functionality and high level solution subsystems needed to satisfy business requirements identified during the Analysis phase. It includes:

- Propose a high-level technical architecture that fits the client's interface and communication architecture.
- Investigate interactions with the other systems.
- Create the Solution Design Document
- Technology / product consideration/ selection

In the design stage the team would build on the previous Analysis work by acting on the deliverables that result from the requirements workshops conducted for each area of the brief. The specific goals of the Design phase include, but are not limited to:

- Creation of the Solution Design Document, which provides the overall solution description in business language, and includes the capabilities being enabled by the solution, in order for the business decision makers and other stakeholders to obtain a clear view of the proposed solution architecture and flow.

- Presentation of estimates to the client for the proposed modifications, integrations, and data migration programs.
- Customer sign-off on the overall implementation design, specific modification designs, data migration design, and estimates for next phase activities.

3.6   Training

Chess Digital can provide various training programs tailored to your digital strategy. We predominately focus on training the 'trainers' such as super users, as this is more cost effective for clients. Training can be conducted on-premises or remotely.

3.7   Migration Services

Our software development team are the best with years of expertise in a huge range of technologies. We can review your current system and design a new solution to achieve your digital strategy.

Chess Digital undertakes the support, extension, and redevelopment of your new content management solution. So that you can make the move easily and with minimal disruption to your day-to-day activities.

3.8   Project Management

Our Project management preferred approach is an Agile one. Agile Project Management (APM) is an iterative approach to planning and guiding project processes. Just as in Agile Software Development, an Agile project is completed in small sections. These sections are called iterations. . In Agile Software Development, for instance, an iteration refers to a single development cycle. Each section or iteration is reviewed and critiqued by the project team, which should include representatives of the project's various stakeholders. Insights gained from the critique of an iteration are used to determine what the next step should be in the project until the desired goal is achieved.

As part of the project management model, frequent Sprint reviews are hosted. Such as Daily Scrums, this is an example of Chess Digital's initiative for the project team, client partners and senior management to have visibility of the development progress. This promotes an open and 'no surprises' approach in project delivery and prioritisation of requirements.

Figure 1: Chess Digital Core Project Management Framework

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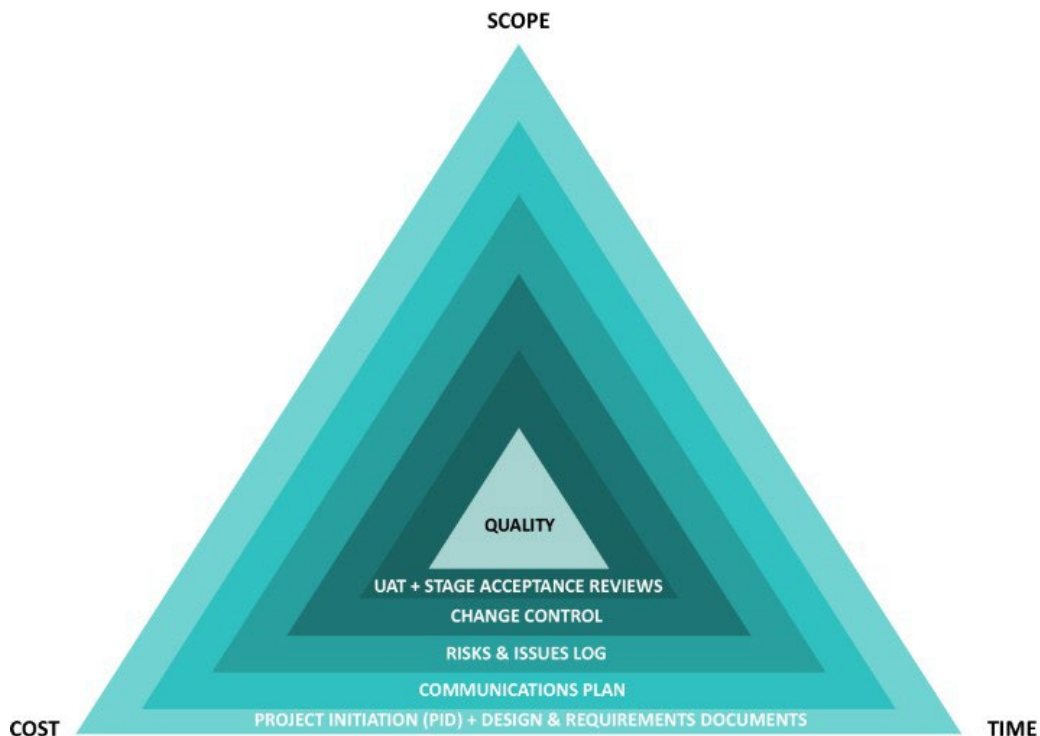
3.8.1 Key Benefits

- Dedicated project manager allocated to each project serve as a point of contact.
- Saving effort and maximizing investment through proactive engagement and planning with development team
- Increased risk assessment through frequent Project Sprint Reviews – any issues are identified early in the process
- Developing higher quality of product/service the first time
- Provide Project Management documentation e.g. Issue Logs, Risk Logs, Project Plan
- Efficient software solutions to track and manage defects, issues and change requests. e.g. Microsoft Project, Visual Studio

3.9   Support Service Benefits

Chess Digital provides a comprehensive and flexible support service. Our support program successfully supports Umbraco systems deployed UK wide with thousands of users.

Chess Digital offers a dedicated helpdesk service manned by engineers familiar with the Umbraco development model from 9am to 5pm. Extended hours are available upon request.

3.9.1 Key Benefits

- Unlike many IT support contracts, which may cover only operational support. Chess Digital support program combines operational support with proactive advice and knowledge transfer as a value-added service.
- High level of strategic and operational expertise tailored to the needs of your Umbraco system and your digital strategy.
- Technical advice by dedicated engineers based in the UK via telephone, fax, email and available upon request a secure online portal.
- Same day response to fault and error messages is normally provided.

- Responses range from telephone support to on-site attendance as deemed appropriate.

4 Co-Pilot Consultancy Services

With the launch of AI services to the marketplace more than ever clients need direction as to where to take this new offer. It is by no means a situation of buying licenses and then turning the service on.

It is in effect a journey where the first step is to understand whether the client is ready to engage with this new technology through to on-boarding and using the new service. We have created a process within Chess known as Consult, Deliver, Adopt and Support (CDAS) which we follow for many of the services we offer.

Where they all follow the same steps, some are different in terms of the detail and Co-Pilot is no exception.

4.1 Consult

In any engagement the first step is to understand the issue that is looking to be resolved by the toolset selected. With co-pilot there are a few steps to this, and perhaps more than any other service offered this engagement is the area where most time is consumed.

4.1.1 ROI Workshop

What's it going to cost. It's the first area we tackle at a very high level what are we looking to solve, what's it going to save in terms of time and ultimately how many licenses are going to be required in the first instance.

4.1.2 Environment Assessment

These are several assessments designed to understand the current readiness of the client to onboard the service and range from compliance strategies through to data storage and current security level.

4.1.3 Data Content Management

The output from co-pilot is only as good as the data which is to be used. Structure is key to this and as such again several areas are covered to better understand how the data is stored within the M365 environment. These areas include data classification, data governance, data retention, data loss prevention, etc.

4.1.4 Data Security Control

With all systems data security is key to having confidence that data will not be leaked, it is only accessible to the correct people and that auditing is available. Areas covered in the section include user access, device access and location access.

It should be noted that at each stage of the consultation process a failure to pass criteria could

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result in a pause until either remediation work is carried out or is at minimum agreed. Chess has the capability within all these areas to activate any remediation work required.

4.2 Deliver

Chess recommends that when it comes to delivering the solution that early planning is key and that communication of the plan to not just the stakeholder group but to the wider team(s) is essential.

If possible, a pilot delivery approach is advised as that helps to determine the scale and indeed the level of training required which can be put in place prior to a wider roll-out. The aim is to drive user adoption at an early stage which in turn gives more time to deal with the barriers to adoption which will likely arise.

4.3 Adopt

Adoption is in effect the acid test of any new process, service, etc. Chess looks to run the adoption process by understanding at an early stage where the barriers can occur and from their look to mitigate, hence the importance of a pilot delivery approach.

We seek to implement quick wins with new services to generate a feel-good factor amongst the client's staff. Seeking out the product/service champions is key to this as well as providing training and support throughout the length of the delivery into adoption phase.

We look initially to provide training based on a trainer the trainer methodology rather than to the wider client workforce primarily as we have found that it is more likely that people ask their colleagues than the support provider and as such identifying the correct trainers and investing time there provides a better return on investment.

4.4 Support

It is not just a case of delivering a new service and then leaving the customer to it. Many of Chess's clients have been with us for many years as our goal always is to build partnerships. In relation to services such as co-pilot we look to layer in touch points throughout the initial twelve months assessing the success of the implementation as well as providing additional consultancy.

We also look to schedule drop-in sessions for the first three/six months of implementation where the client can use this time to ask specific questions around how to use the product/service or indeed for the trainers to refresh certain aspects/features they have been exposed to.

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5 SharePoint

Chess have worked with the SharePoint platform since the days of SharePoint 2007 since that time our team have built up a wide and deep knowledge of the product from how to get the best out of using it through to migration between versions on premise and indeed from migration from on premise to the cloud.

While the platform is over twenty years old and is now provided as part of the M365 license there remains a preference for clients to still retain the file server approach which realistically is difficult to maintain, difficult to search and tends to create structures which are inflexible.

Whether clients wish to move between versions, migrate to the cloud or just get better value from what it provides, it is in effect a journey. We have created a process within Chess known as Consult, Deliver, Adopt and Support (CDAS) which we follow for many of the services we offer.

Where they all follow the same steps, some are different in terms of the detail and SharePoint is no exception.

5.1 Consult

In any engagement the first step is to understand the issue that is looking to be resolved by the toolset selected. With SharePoint like other products there are a few steps to this.

5.1.1 Setting the Goal

What is the client looking for to achieve better use of SharePoint, better accessibility of files, migration from a file server, etc. Setting the goals is the initial stage to understand what the high-level costs might be. If the client has M365 license estate, then there is no additional license cost but maybe the data volume suggests the purchase of a tool to help migrate data, etc.

5.1.2 Current Position and Environment Assessment

It's at this stage engaging on things like is there an existing SharePoint farm, if the files are stored in a file server what does the structure look like, what might be moved or what might be migrated, etc.

5.1.3 Data Content Management

Very much like other products the user experience is only as good as the data which is to be used. Structure is key to this and as such again several areas are covered to better understand how the data is to be stored within the SharePoint platform. These areas include data classification, data governance, data retention, data loss prevention, etc.

5.1.4 Data Security Control

With all systems data security is key to having confidence that data will not be leaked, it is only accessible to the correct people and that auditing is available. Areas covered in the section include user access, device access and location access.

5.2 Deliver

Chess recommends that when it comes to delivering the solution that early planning is key and that communication of the plan to not just the stakeholder group but to the wider team(s) is essential.

5.2.1 Demonstrate

We look as much as possible to demonstrate in advance the capabilities of the product to the stakeholder group so that they can visualize the deliverable prior to commencement. This makes the building process easier as they have seen in advance what is going to be delivered.

5.2.2 Navigation

The key to a successful build is agreeing the navigation with the stakeholder group, what is sometimes placed on paper does not pass the usability test. Therefore, this engagement validates both the useability and accessibility criteria.

5.2.3 Migration

There are several steps to the migration process, key amongst this is to agree which files are required within the environment and agree a plan to migrate them over. It is usual that when building a new environment, we move a sample of the files over in order to give real time context as to how users will interact.

If possible, a pilot delivery approach is advised as that helps to determine the scale and indeed the level of training required which can be put in place prior to a wider roll-out. The aim is to drive user adoption at an early stage which in turn gives more time to deal with the barriers to adoption which will likely arise.

5.3 Adopt

Adoption is in effect the acid test of any new process, service, etc. Chess looks to run the adoption process by understanding at an early stage where the barriers can occur and from their look to mitigate, hence the importance of a pilot delivery approach.

We seek to implement quick wins with new services to generate a feel-good factor amongst the client's staff. Seeking out the product/service champions is key to this as well as providing training and support throughout the length of the delivery into adoption phase.

We look initially to provide training based on a trainer the trainer methodology rather than to the wider client workforce primarily as we have found that it is more likely that people ask their colleagues than the support provider and as such identifying the correct trainers and investing time there provides a better return on investment.

5.4   Support

It is not just a case of delivering a new service and then leaving the customer to it. Many of Chess's clients have been with us for many years as our goal always is to build partnerships. In relation to services such as SharePoint we look to layer in touch points throughout the initial twelve months assessing the success of the implementation as well as providing additional consultancy.

We also look to schedule drop-in sessions for the first three/six months of implementation where the client can use this time to ask specific questions around how to use the product/service or indeed for the trainers to refresh certain aspects/features they have been exposed to.

6   Data Visualization Services

Chess have been providing data visualization services since the days of ProClarity in the early 2000's since that time our team have built up a wide and deep knowledge of the range of visualization tools with the M365 stack from how to get create that single point of the truth through to being able to consume data while on the move.

Whether clients wish to leverage reporting via excel through to Power BI we have created a process within Chess known as Consult, Deliver, Adopt and Support (CDAS) which we follow for many of the services we offer.

Where they all follow the same steps, some are different in terms of the detail and Data Visualization Services are no exception.

6.1   Consult

In any engagement the first step is to understand the issue that is looking to be resolved by the toolset selected. With Data Visualization Services like other products there are a few steps to this.

6.1.1 Setting the Goal

What is the client looking for to achieve more accurate information, delivered in a timelier manner, to be able to consume data on the move, etc. Setting the goals is the initial stage to understand what the high-level costs might be.

6.1.2 Current Position and Environment Assessment

It's at this stage engaging on things like is there an existing reporting set to work from, is so what are the running themes in terms of design, what might be reused and what can be discarded, etc. Where is the current reporting running from.

6.1.3 Data Content Management

Very much like other products the user experience is only as good as the data which is to be

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used. Structure is key to this and as well as provenance of the data (or one version of the truth as we call it).

6.1.4 Data Security Control

Who has access to the reporting is also key and whether certain elements are to be blocked out to certain user groups needs to be understood and indeed modeled.

6.2 Deliver

Chess recommends that when it comes to delivering the solution that early planning is key and that communication of the plan to not just the stakeholder group but to the wider team(s) is essential.

6.2.1 Demonstrate

We look as much as possible to demonstrate in advance the capabilities of the product to the stakeholder group so that they can visualize the deliverable prior to commencement. This makes the building process easier as they have seen in advance what is going to be delivered.

Demonstration also forms a key part of the delivery process in terms of showing the progress of the project. Data visualization is notoriously difficult to deliver as client's expectations can often differ wildly from initial thinking. It is also for some clients very difficult to articulate what they need therefore seeing the reporting built throughout the lifespan of the workstream is useful to avoid surprises at the end. It also allows for changes to be made mid project.

6.3 Adopt

Adoption is in effect the acid test of any new process, service, etc. Chess looks to run the adoption process by understanding at an early stage where the barriers can occur and from their look to mitigate, hence the importance of a pilot delivery approach.

We seek to implement quick wins with new services to generate a feel-good factor amongst the client's staff. Seeking out the product/service champions is key to this as well as providing training and support throughout the length of the delivery into adoption phase.

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We also look to schedule drop-in sessions for the first three/six months of implementation

where the client can use this time to ask specific questions around how to use the product/service or indeed for the trainers to refresh certain aspects/features they have been exposed to.

7 Bespoke web-application and software development, including integrations

We offer custom web-application and software development, often with extensive integrations with third-party data sources or services.

7.1 Consult

Our planning process begins with interactive workshops to elicit and document key Business and Functional Requirements. After collaborating closely with users, findings are presented to the client group for verification, revision and approval in a form that is succinct, transparent and comprehensive. The User Interface (UI) is designed and articulated in the form of wireframe diagrams, prior to the application of any branding. In tandem, consideration is given to database and other back end services.

7.2 Deliver

High-fidelity designs are then produced by our creative team, applying crucial aspects related to brand, tone and style in a way that adheres to your brand guidelines - typically between two to three iterations. On sign off on key pages, development commences. UI elements are always device and platform agnostic, and adhere to WCAG specifications, fully tested across common browsers and screen resolutions.

7.3 Support

Chess Digital provides a comprehensive and flexible support service. Our support program successfully supports Umbraco systems deployed UK wide with thousands of users. Chess Digital offers a dedicated helpdesk service manned by engineers familiar with the Umbraco instance from 9am to 5pm. Extended hours are available upon request. Unlike many IT support contracts, which may cover only operational support, Chess's managed service package combines operational support with proactive advice and knowledge transfer as a value added service. A high level of strategic and operational expertise tailored to the needs of your system and your digital strategy. We offer remote video calls as standard, but can offer phone support or on-site attendance as appropriate.

We setup and configure remote monitoring for all of our software and services as standard, with nominated distribution groups reveiving notifications about service outages or issues.
Chess are one of the Highest Accredited UK Microsoft Partners, with 5 out of 6 Solution Designations and 3 specialisms:
- Infrastructure - Azure
- Modern Work
- Data and AI
- Security

- Digital and App Innovation - Azure

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