G-Cloud 14 Service Definition –

mhance Consultancy & Support Services

Microsoft Solutions Partner
Business Applications

Microsoft Solutions Partner
Modern Work

Microsoft Solutions Partner
Data & AI
Azure

Microsoft Solutions Partner
Digital & App Innovation
Azure

Microsoft Solutions Partner
Infrastructure
Azure

Crown Commercial Service Supplier

CYBER ESSENTIALS CERTIFIED PLUS

ISO 9001 CERTIFIED
UKAS MANAGEMENT SYSTEMS
British Assessment Bureau

Microsoft Solutions Partner

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Service Overview

The Power Platform, Dynamics 365 and Microsoft 365/Office 365 are a strategic part of Microsoft's overall cloud services offering and include powerful out-of-the-box integration with the wider Microsoft cloud ecosystem. mhance works collaboratively with its customers to design, build and support enterprise-wide systems for organisations that wish to improve operational performance by leveraging Microsoft Cloud services. mhance has technical and functional experience of delivering Cloud-based services across a range of sectors, including the UK Public Sector. The services provided by mhance typically include:

- Solution Architecture
- Project Management
- Technical Assurance
- Digital Cloud Service Design
- Microsoft Cloud Architecture & infrastructure Advisory Service
- Data Modelling
- Data Migration Consultancy
- Data & Analytics Consultancy (including Data Warehousing)
- Integration Consultancy
- AI, Copilot and Machine Learning Consultancy
- Cloud Migration & Azure Consultancy
- System Review & Recommendations
- Project Management
- App Development
- Software Development
- Quality Assurance/ Test Strategy
- Training and User Adoption
- Service Desk - Technical Support
- Customer Success Plans
- Licencing Efficiency Review and Auditing
- Secure Productivity Consultancy

mhance is a leading Microsoft partner with more than 20 years' experience specialising in the design, implementation and support of enterprise-wide business systems using innovative Cloud Services including Microsoft Azure, Dynamics 365 Sales & Customer Engagement (CRM), Dynamics 365 Customer Insights – Journeys (Dynamics Marketing), Business Central & GP (ERP Finance), the Power Platform, SharePoint and Microsoft 365/Office 365, as well as a number of complementary third party solutions from the Microsoft Partner ecosystem such as KingswaySoft, Fundraise Up, ClickDimensions, dotdigital, eOne, Solver, Pryme/Progressus, Continia and insightsoftware/Jet Global.

UK-based Implementation and Technical Support Services are provided throughout the UK with Office Hubs in Manchester and Dublin.

mhance has all of the skills and resource in-house to deliver both tactical and large-scale transformation projects which is evidenced through the successful delivery of projects in partnership with the following Public Sector and Not-for-Profit customers:

- Department for Education
- Independent Parliamentary Standards Authority
- Teaching Regulation Agency
- Institute of Public Administration
- Parliamentary and Health Service Ombudsmen
- Local Pensions Partnership
- Information Commissioner's Office
- East Lothian Council
- Falkland Islands Government
- Investors in People
- East Anglian Air Ambulance
- Oxfam International
- Christian Aid
- Blood Cancer UK
- The Children's Society
- Anthony Nolan
- Médecins Sans Frontières
- MIND
- Motor Neurone Disease Association
- Concern Worldwide
- Duke of Edinburgh's International Award
- Muscular Dystrophy
- Educational Development Trust
- The Charity for Civil Servants
- Stroke Association
- Rethink Mental Illness
- Diabetes UK
- Tyne & Wear Passenger Transport Executive (Nexus)

- Woodgreen Pets Charity
- Sense
- Macmillan Cancer Support
- RNIB
- WWF International
- WWF UK
- Dementia UK
- Surfers Against Sewage
- Versus Arthritis
- Medical Aid for Palestinians
- Council for World Mission
- Sustrans
- Cats Protection
- The Royal Agricultural Benevolent Institution
- The London Library
- Action Against Hunger UK
- Bumblebee Conservation Trust
- Law Society of Scotland
- Thames Valley Air Ambulance
- The Brooke Hospital for Animals
- Solent Mind
- The British Association for Supported Employment
- Action Medical Research
- Private Healthcare Information Network
- B2W Group

mhance is a multi-designation Microsoft Gold Solution Partner for Cloud Business Applications, Dynamics 365, Sales/Customer Service (CRM), Customer Insights – Journeys (Dynamics Marketing), ERP/Finance (Business Central and GP), Power Platform, Azure, Infrastructure, Modern Workplace, Data & AI and Digital & App Innovation, and has been delivering Dynamics projects since the launch of Dynamics CRM v1 in 2003. mhance's Microsoft services are comprised of the following offerings:

- Microsoft Dynamics 365 Consultancy
- Microsoft Dynamics 365 Sales (CRM) Implementation and Upgrade Consultancy
- Microsoft Dynamics 365 Customer Service (CRM) Implementation and Upgrade Consultancy
- Microsoft Dynamics 365 Customer Insights – Journeys (Dynamics Marketing) Consultancy
- Microsoft Dynamics 365 ERP Finance Business Central Consultancy
- Microsoft Dynamics 365 ERP Finance GP (Great Plains) Consultancy
- Microsoft Power Platform Consultancy
- Microsoft Power Apps Consultancy
- Microsoft Power Pages Consultancy
- Microsoft Power Automate Consultancy
- Microsoft Power BI Consultancy
- Microsoft Dataverse Consultancy

- Microsoft SharePoint Consultancy
- Microsoft 365 Consultancy
- Microsoft Modern Workplace Consultancy
- Microsoft Office 365 Consultancy
- Microsoft Azure Consultancy

Our Approach

Many of the organisations that mhance has delivered digital services for, have complex business processes that are unique to their organisation. For this reason, mhance has developed an agile delivery methodology, which is based on Scrum and shares the core principles of Microsoft's Sure Step delivery framework, to scope, design, build and deliver solutions in partnerships with customers. This approach enables customers to incrementally release required functionality early in the project by focussing on an MVP, thus accelerating the time to value for the organisation.

The image below outlines our agile methodology at a high level.
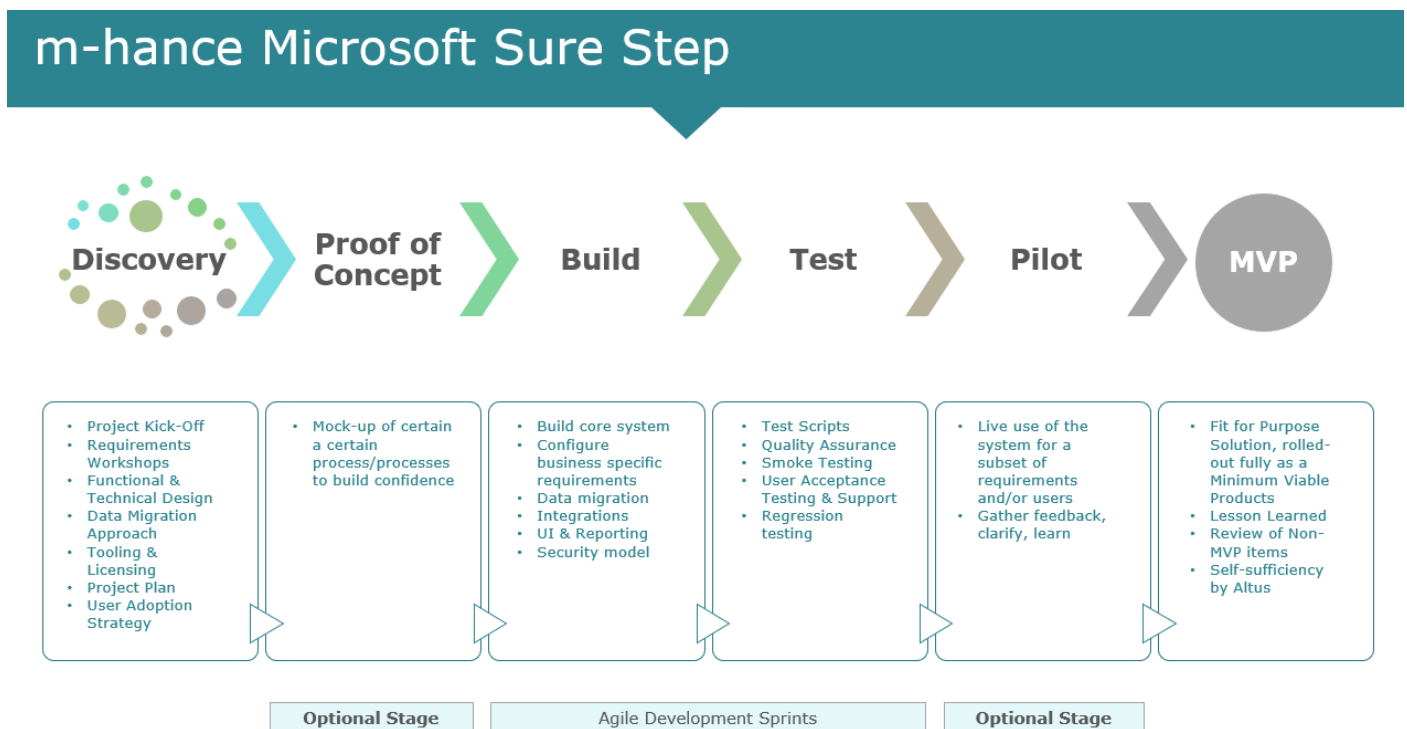
Project Management

All Projects are assigned a dedicated mhance Project Manager. Our Project Manager will work in collaboration with customers from the outset to plan, shape and provide project governance. To ensure the smooth running of the project, it is essential that there is continuous communication between all Project Managers and mhance has developed a suite of tools and assets to facilitate the required collaboration. This will include the standard documentation which we will jointly use to ensure the smooth running of our combined management to success. Documentation can be held on a shared folder on the mhance SharePoint domain in order to ensure we all have the latest versions and to reduce email traffic.

Project documentation and reports typically consist of the following:
- Project Charter – the project 'bible'
- Project Risk and Issues Log (RAID Log)
- Project Highlight Report (issued every two to four weeks)
- Functional Requirements Document (FRD)
- Functional and Technical Specification Documents (FSD & TSD)
- Project Plan and amendments

- Availability Schedule (team availability; key business events we need to work around; closures)
- Work Reports for all consulting time
- Project Status Review
- Change Control Documentation
- Training Needs Analysis and training plans
- Testing Plan
- Go-Live Plan
- Project Sign off and Closure Documents
- Invoicing and budget report

mhance also uses Microsoft Dynamics 365, together with Office 365, internally to manage communication and progress, as well as MS Project for scheduling and Azure DevOps for development pipeline and release management.

PMO

The Project Management Office (PMO) at mhance, performs a vital role in ensuring that all projects are delivered to the highest standards. Our PMO team will provide a centralised hub for the project, where they will work in collaboration with the Project Manager to ensure continuity of:
- Scheduling of resources
- Timely output of deliverables to support the next stage
- Reporting (time, budget, invoices etc)
- Project Governance at key milestones

Governance

The scale and nature of this project will require good practice and good governance. It is imperative that these are in place during Discovery, with as seamless transition as possible into the Implementation stage. mhance will commit a dedicated team to the Discovery and Implementation, including a full time Project Manager and several consultants, as required. Key themes in mhance's experience of delivering successful projects include:

- Executive buy-in and sponsorship: Clear endorsement and participation from a member of the customer's Senior Management team. This will be mirrored by executive sponsorship within mhance from a nominated Director.
- Visible involvement by the management team, especially around Change Control.
- Regular updates and reporting.
- Devolved authority for quick decision making - empowering the customer's project team to make decisions, essential in an agile project delivery.
- Clearly defined roles and responsibilities.
- Mutual transparency on risk is a cornerstone of effective project delivery as well as clear sign of real and positive collaboration between mhance and our customers.

Discovery & Design

During the Discovery and Design stage, mhance and the customer will work collaboratively to define the project approach and explore the requirements in more detail. The following key activities will be delivered during this stage:

- **Initial kick-off;** the initial kick-off meeting is held to reaffirm the scope of the project and will typically involve the mhance Project Manager, the mhance Consulting Manager and the Lead Functional Consultant. The client Project Manager and Key Stakeholders will generally be part of this meeting.
- **Functional Design;** Functional Requirements Backlog including user stories with a MoSCoW (Must/Should/Could/Won't) rating to understand the requirements that are in scope for MVP and beyond, personas for each of the different types of user and the acceptance criteria for each story.
- **Technical Design;** current and future state architecture and integration diagrams, high level data migration and integration requirements, definitions and a proposed toolset and approach for migration and integration.
- **Data Modelling;** undertake a data modelling exercise to ensure that data can be migrated to the new system. This workshop also includes an early discussion around which data is and is not required, as well as discussions around de-duplication tasks to ensure that when the system is commissioned, it has all relevant data and is in line with the organisation's Data Governance Strategy.
- **Environments & Licencing;** as part of the initial project requirements mhance will work with internal IT teams to advise on set up of environments and licensing. Recommendations are made based on past experience within Microsoft guidelines.
- **Change Strategy & User Adoption;** Strategy to engage stakeholder and training needs analysis and planning.
- **Documentation Playback & Sign-off;** presentation of outputs from Discovery including clarification and sign-off.

Implementation

Following sign-off of the Functional Requirements Document (FRD) and the signing of contracts for the implementation phase, delivery can commence.

Project Kick-off; during the initial days of the implementation, the mhance Project Manager (PM) will schedule a project kick-off with the customer to produce a more detailed project plan, agree ways of working and start to define project documentation. A typical agenda of a project kick-off would include:

- Introductions
- Roles and Responsibilities (both the customer and mhance)
- Executive Summary of the project
- Scope and Deliverables, including data migration, mappings and integrations
- Project Methodology
- Timeframes

- Ways of Working and Project Tools (e.g. Azure DevOps, SharePoint Risk log, Teams, etc)
- High Level Project Plan (this may only be high level dates at this point, and may be subject to more detailed planning)
- Communication Plan and agree reporting methods for project status, risk log, timesheets, budgets, change requests, etc
- Meeting schedules
- Schedules for sprint planning, playbacks and retrospectives
- Expectations regarding User Acceptance Testing
- Expectations around project sign-off and closure
- What's going to happen in the next 2-4 weeks? (Especially important if the customer needs to provide documentation, build out user stories, engage partners or support workshops etc.)
- The start of User Adoption and getting everyone excited about the project!

Agile Development; Our Agile development approach, ensures that solutions are implemented with the user needs at the heart of the solution, whilst also ensuring that requirements are aligned with the wider objectives of the organisation. mhance strives to be flexible and agile, as, in our experience, the most important aspect is to find the best fit for each project. The image below outlines our development approach at a high level.
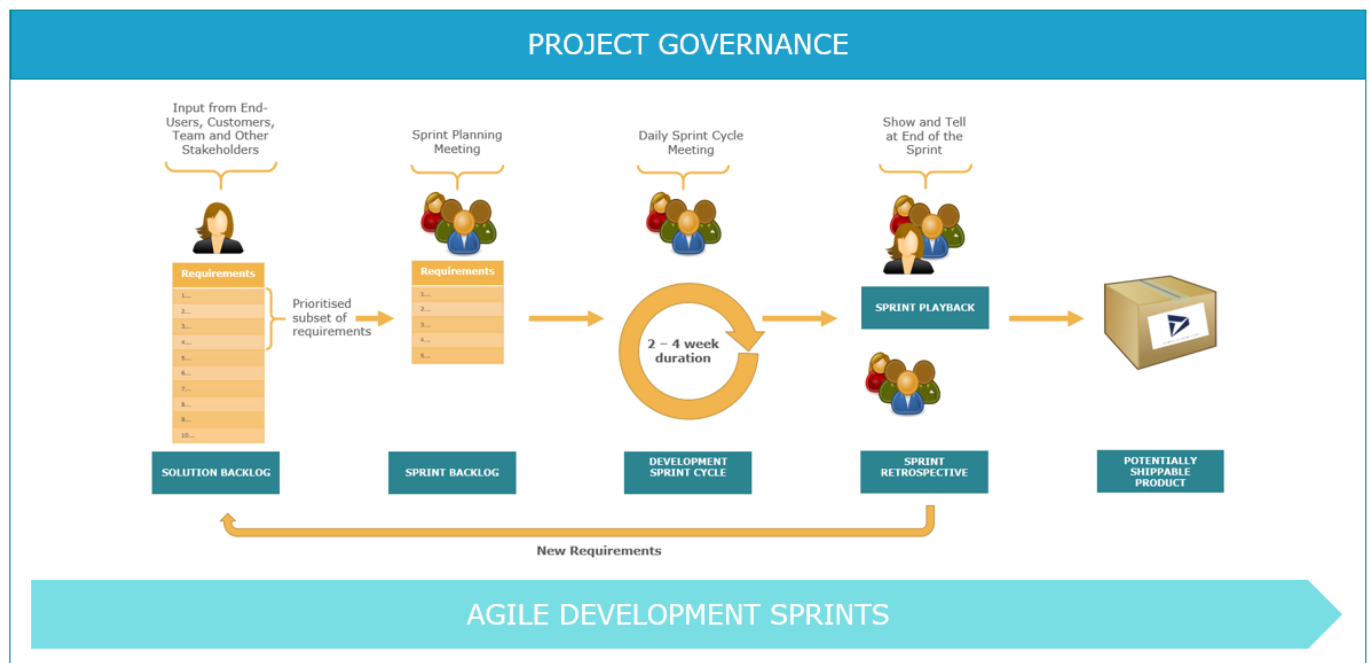
Data Migration; the quality of the data held within the new solution will strongly affect user adoption and system credibility, therefore directly impacting key objectives for this important project. The right approach to data migration can give you a great head start, but the right data integration and maintenance approaches are essential, as this will ensure data quality is maintained.

mhance considers data and data quality to be a core part of every solution delivery, and data related activities are built into our Agile methodology. Our extensive experience migrating complex, connected data sets from a source state into a target state has led to the creation of a set of assets to propose migration strategies, control on-project deliveries and engage business units to fully collect all required information to provide an informed approach. We recognise that each organisation is unique in terms of the data it holds and people, tools and processes it has in place to consume and maintain data. As such, mhance proposes that we support and mentor the data migration phase and that the customer leads on data cleansing, de-duplication and formatting of data for import. mhance will of course provide support, guidance and advise on best practice. However, this is subject to further discussions during Discovery.

mhance also recommends the use of a third party ETL tool for data migration and integration, such as KingswaySoft. The KingswaySoft product set (KWS) utilises Microsoft's SQL Server Integration Services (SSIS) platform, KWS enriches the standard SSIS platform with a suite of connection manager components. These connectors are pre-configured to allow much easier interaction with the source or target systems typically through the APIs or Web Services.

KingswaySoft has a vast array of connectors available for a broad ranging base of applications, platforms and technologies. We have successfully used KWS for numerous legacy data migrations, either on behalf of the customer or in collaboration with the customer as they have wished to become self-sufficient in the use of the toolset.

Quality Assurance; once mhance has completed the build and initial testing of the solution, the system is ready for user testing. The solution will be deployed to a designated UAT instance ready for UAT to commence.

UAT is a crucial part of the project as it is at this point that the entire system, or elements of it, will be given to agreed users to test functionality. Dependent on the agreed release cycle, there may be multiple rounds of UAT which can be at the end of given phases or a 'whole system testing approach' could be utilised. UAT is the process of exercising the software to verify that:

- o It satisfies the business requirements that are defined in the functional specification
- o It is fit for purpose for running the end-to-end business processes
- o Any data which has been migrated from legacy business solutions has been imported correctly
- o Performance of the new application is acceptable, including testing under a certain load or stress.

Change Control; the change control process is initiated when a customer requires a change in scope to the original requirements that were agreed within the FRD. This can include requirements that are removed from scope, or where additional requirements need to be added.

All changes in the scope will be documented, and, where necessary, estimated by mhance. Changes will only be approved and implemented when both parties have agreed and when the customer has signed off the change request. It should be noted that changes can have a detrimental effect to the project timelines and could impact the ability to deliver MVP within the agreed

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timeframes. It is therefore crucial that all changes are managed through this process and discussed prior to approval of the change request.

Go-Live; The Go-Live is the critical point of most implementations. To ensure all parties involved in the process are all informed, a go-live plan will be produced and will generally consist of the following elements:

- Timelines
- Roles and responsibilities of all parties. This includes any third-party suppliers involved in the project
- Training plan
- Communication plan
- Risk log detailing known risks and mitigations
- Transition to Business as Usual (BAU), including post go-live support and plan for handover to IT / Support teams
- Documentation

Post-Go-Live Support

Our standard approach to project delivery includes an element of post-go-live support, where a member (or members) of the project team provides hands-on support during the initial period of live operation.

The duration and intensity of this support is entirely open to discussion.

As well as providing practical assistance and minimising go-live risks, this also helps to transition into 'business as usual' support via the mhance Helpdesk.

mhance Helpdesk Support

mhance operates a UK-based helpdesk that is one of the most experienced Microsoft Dynamics support operations in the UK. Our range of specialist support engineers are on-hand to provide primarily remote assistance for all elements of the solution. All tickets raised and progress are managed through Microsoft Dynamics CRM.

With Microsoft Cloud solutions, the 'infrastructure' and core application level are supported by Microsoft, with whom mhance will liaise on the customer's behalf.

Response and Service Level Agreement

The following tables detail the mhance standard support Service Level Agreement regarding response and resolution times, along with definitions of issue priorities.

Action	Priority 1	Priority 2	Priority 3	Priority 4
Response from support consultant within:	1 Working Hour	2 Working Hours	4 Working Hours	2 Business Days

Use of reasonable endeavours to resolve (fix) within:	1 Business Day	2 Business Days	5 Business Days	N/A

Priority	Definition
Priority 1	Critical – entire system down.
Priority 2	Urgent – individual function down, no workaround available, remainder of system working.
Priority 3	Standard – Individual function down, workaround available.
Priority 4	Other – training or procedural issues.

Support Hours and Access

Standard mhance support hours are Monday to Friday (excluding UK Bank Holidays) 9:00am to 5:30pm.

The mhance Support Helpdesk can be accessed via telephone, email or the mhance self-service web portal. The self-service web portal is available 24 / 7 to log support cases and review case status.

mhance is accredited to the ISO 9001 quality management standard.