

G-Cloud 14

The Berkeley Partnership

Cloud Support Migration Planning

Service Definition Document

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Cloud Support - Migration Planning

1. Service Description

1.1. As per the framework specification, migration planning service includes the provision of strategy and planning services to enable you to move to cloud software and/or hosting services.

1.2. We support strategy setting, migration planning and operating model design for you to then go on and successfully deliver end-to-end cloud and product-based operating model transformations.

1.3. Our services include:

1.1..1. Strategy & Planning

- Business Strategy
- IT strategy
- Digital strategy
- Data & Analytics Strategy
- AI Strategy & transformation

1.1..2. Target operating model design

- Cloud and product operating model
- IT operating model
- Digital operating model
- Organisation design and implementation
- Digital transformation
- IT transformation

1.1..3. Supplier Selection

1.1..4. Programme mobilisation

2. Context to our services and approach

2.1. The decision to move operations to the Cloud and/or shift towards a more product-based technology operating model (e.g. merging development and operational capabilities into “DevOps” and forming multi-disciplinary teams for technology product development that merge traditional business and IT roles) presents businesses with both challenges and opportunities. The challenges include the sourcing of capability and third-party assistance; contracting and incentivising the

right behaviour; training and upskilling your people; the legislative and regulatory implications of infrastructure potentially housed overseas; the transition to very new and different ways of working and governance; the provision of new tools and techniques, methods and standards; and the sheer scale of work involved in a wholesale cloud migration.

- 2.2. Most organisations already understand the value of moving their IT infrastructure to the Cloud. The ability to access software and services via the internet offers flexibility, scale/capacity, security and cost transparency. But moving to the Cloud also changes the way the IT function works – with less focus on running infrastructure and an increased opportunity to become more business- and customer-centric.
- 2.3. We have worked with major organisations across the public sector as well as many of the world's leading companies. Having supported them with the development, design and implementation of their Cloud IT strategies, we bring a compelling combination of private sector best practice with knowledge and experience of the public sector challenges and opportunities. Our functional understanding, technology and digital expertise, and transformational change know-how enable us to make it all happen.
- 2.4. Good Cloud-based transformation starts with a clear strategy, an informed delivery plan that's aligned to an organisational structure and operating model and great change management. On all counts, we have extensive experience. What's more, we have the independence and collaborative style to work with you to deliver a transformation that is really owned by your team, and best supports your organisation.
- 2.5. We can help you improve and transform your Cloud IT function and capabilities. This can take in changes across a number of key areas. It often involves structural changes that enable IT to get closer to the organisation, and support core strategic objectives. It could mean major changes in the way Cloud IT products are delivered, for example setting up IT as a shared service or changing your sourcing strategy. Increasingly, it is about moving IT away from a primarily cost-driven agenda to a source of end user/customer-facing differentiation. This puts IT on the front foot – focusing the function on making the most of its potential not only to support but to drive the organisation forward.

3. Our service features and benefits

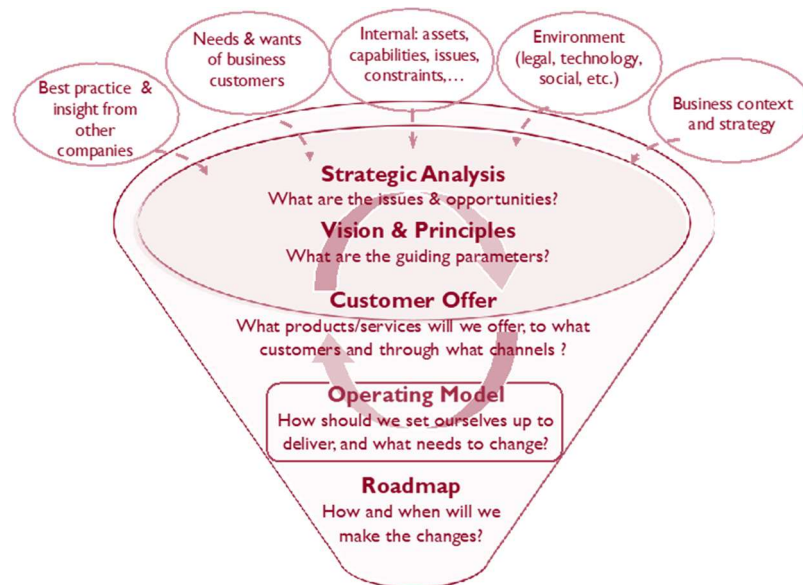
3.1. Service Features

- 3.1.1. **Strategy and Planning:** The Berkeley Partnership's business strategy consultants can help you build your thinking and develop your plan. We can partner with you to refine your targets, identify your areas of value and deepen your understanding of what keeps you operating efficiently. We can ensure your strategy is set in the context of a shared vision and purpose for the organisation and aligns successfully with your operating model, with an underpinning plan of how to achieve it. For the deployment of Cloud products, we would be able to support on:

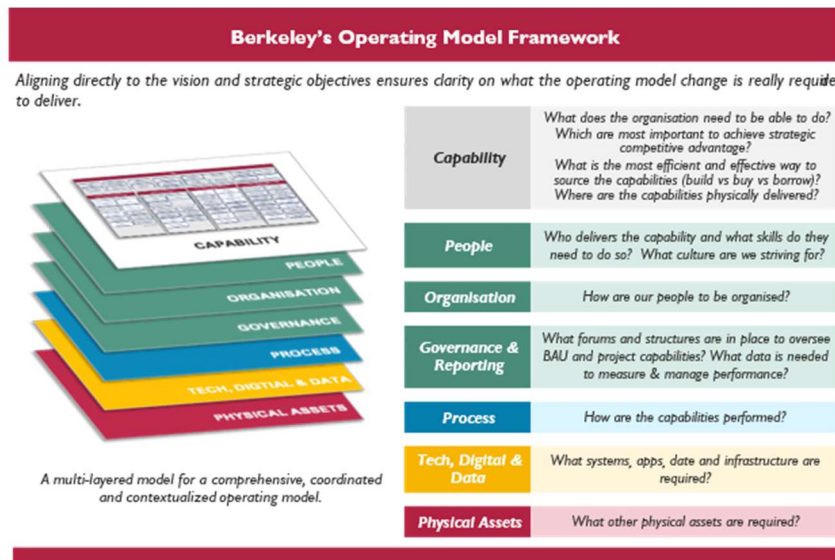
- Business Case

- Cloud Strategy
- Developing your Cloud transformation roadmap
- Assessing your organisation's Cloud capabilities and maturity
- IT & Digital Strategy
- Data & Analytics Strategy

Our approach to strategy development is based on principles of clarity, choices and coherence – we will work with you to strategically analyse your options and co-create a direction of travel together. An example of the questions we will work through together:



3.1.2. Target Operating Model Design: Berkeley uses a proven approach and a depth and breadth of experience to help clients design the right operating models for their organisations – all or part – taking in all relevant layers as necessary, such as capability, process, design of organisation and key functions, roles and responsibilities, sourcing, location, data, technology, management information and governance. It's critical to ensure you have strong leadership, governance, and rigorous execution in place – capitalising on the experience of those who have previously implemented transformations of this size to achieve real value. We will bring our Operating Model Framework to our engagements to ensure coverage and consistency in our approach to get the most effective outcomes and decision-making processes:



For the deployment of Cloud products, we would be able to support on:

- Organisational Design and implementation planning
- Managing the cultural, organisational and people changes using our adaptable change management approaches and expertise

3.1.3. Supplier Selection: We can create a partner sourcing strategy to help you identify and confirm the broader business outcomes you want to achieve plus what a partner can bring to you in that context. Too often businesses rush into selection without working this through, and end up with the wrong partner or waste time in a long, protracted selection process. With digital and agile development of Cloud capabilities, it's all too easy to quickly end up with a complex partner ecosystem before you've really set the direction, and agreed how you'll get there. This would include:

- Identifying and implementing the right solutions including new applications and systems where they are most beneficial and value for money
- Selecting partners, suppliers and vendors.

3.1.4. Programme mobilisation: We provide a comprehensive range of services to suit the needs of our clients' cloud projects and programmes. We can help you at any stage in the change and transformation lifecycle. Our offerings include:

- Project and programme mobilisation.
- Establishing and embedding a Project/Programme/Portfolio Management Office (PMO).
- Partner, supplier and vendor selection and mobilisation.
- Leadership and management of vital enabling elements such as stakeholder engagement and communications; change management; testing; benefits management; and service introduction/transition.
- Organisational and people change – driving the right culture, user adoption and that your workforce and stakeholders are bought in and involved appropriately.

3.2. Service benefits

3.2.1. Strategy and Planning:

- Turning strategy into plans and designs which deliver real beneficial transformation and capabilities
- Strong process orientation and focus on the final outputs
- Progressing new solutions to improve core and strategic operations
- Collaborative working style, facilitating real ownership of the strategy and maintaining your control and visibility of delivery
- Independent, low volume - high value consultancy model

3.2.2. Target Operating Model Design

- IT Strategy and functions which fit your organisation and support core strategic objectives
- Building agile IT functions capable of responding to operational demands

3.2.3. Supplier Selection

- Focus on improving effectiveness and efficiency, and delivering low IT costs whilst meeting SLAs

3.2.4. Programme mobilisation:

- Defining your organisational and technology vision, strategy and/or business case.
- Plotting your route to achieve the desired outcomes, developing an enterprise technology roadmap.
- Managing delivery and ensuring benefits are tracked and embedded; driving user adoption and a technology enabled, data-driven culture; and maintaining the business case for further capability investment.
- Designing and implementing governance which is fit for purpose, robust but pragmatic, including appropriate enterprise and solution design authority and change control.
- Mobilising and managing cloud technology projects including specific Software, Platform or Infrastructure-as-a-Service (SaaS, PaaS and IaaS), including cloud data lake, data warehouse, analytics tools and platforms.
- Managing multi-disciplinary transformation programmes and projects, including complex multi-party and/or multi-vendor environments - using Agile, Waterfall, and hybrid approaches.
- Proactively manage vital inter-organisational relationships, external and internal interdependencies, and delivery risks and issues.
- Balancing strategic, operational and technology agendas to ensure the right outcomes and benefits are fully realised for your organisation.

4. Our Experience

We have worked with a wide variety of clients, with examples including:

4.1. Strategy and Planning

- 4.1.1. This multi-national supply chain logistics company engaged Berkeley right at the start of their cloud transformation journey to help define the strategy, approach, partnership model, and business case. Our work continued alongside the strategic implementation partner, where we led the team through the migration of 134 applications to the cloud, including the critical enterprise application SAP ECC, and transformed the primary digital customer portal into cloud-native architecture.
- 4.1.2. Berkeley was engaged to create an exit plan for an existing IT platform provider and subsequently engaged to lead the transition to the incoming partner. The Cloud platform ran all business applications globally, including the global SAP system (at the time, one of the largest SAP systems running on public Cloud) – so this was a critical transition. Berkeley defined, mobilised and executed the transition programme, managing outgoing and incoming supplier teams to ensure seamless delivery against the plan. Given the criticality to BAU operations the programme was high profile within client leadership team; Berkeley proactively identified key risks, implementing robust mitigation measures to prevent business impact. In addition, Berkeley developed communications to update on progress and articulate programme rationale and benefits.
- 4.1.3. We developed the full business case for a major UK public service provider to transition to a cloud data platform-as-a-service, and helped mobilise the implementation programme. This will migrate their mission-critical core data warehouse to Google's cloud platform, and also build the organisation's data gathering, management, and business intelligence and analytics capabilities. Other key goals are to halve the technology run costs whilst having greater flexibility and maintainability. We led the evaluation, selection and migration of core HR platforms onto Workday and Cornerstone for a major global company. This involved 170,000 users across 106 countries, including the integration to over 40 payroll providers.
- 4.1.4. Supporting one of the UK Government's largest regulatory bodies to develop its IT Strategy, and provided management for the successful implementation of the resultant transformation programme.
- 4.1.5. Working with the leadership team of a UK nationwide public services provider to coordinate and control its IT Transformation
- 4.1.6. Supporting a major UK public utilities company to lead an internal transformation process, run their IT department and at the same time develop a strategic investment programme
- 4.1.7. Supporting a global packaging organisation to develop a group IT vision and strategy to drive efficiencies out of a highly federated IT organisation
- 4.1.8. We worked with a major UK retailer to produce a Business Case for transitioning

their stores from the Directly Managed operating model to a franchise-operated model. A Berkeley consultant worked for 12 weeks with their office executives, carrying out significant analysis, commercial modelling, and programme planning. A number of long-standing assumptions and principles were challenged and a new strategy was devised, as a result of the successful business case.

4.2. Target Operating Model Design

- 4.2.1. A multi-national supply chain logistics company wanted to consider a potential refresh of their IT Operating Model and Ways of Working, given the migration to Cloud based products. Berkeley led the scoping of a new IT Operating Model, establishing a clear case for change and, through careful stakeholder management, built alignment and endorsement across the IT leadership team to move forward with implementation.
- 4.2.2. We collaboratively led the exploration of future Support Services Operating Model options for a County Council organisation, using internal insight and external best practice, and gain consensus on a recommendation and delivery plan from the CEO, Exec Directors and Service Director
- 4.2.3. Berkely facilitated an organisation wide Target Operating Model design of a public sector corporation, developed a business case to evaluate benefits, costs and risks of implementing the model, and redesigned the c. 5000 employee business structure. This TOM incorporated the refocusing of enabling functions such as HR, Finance and IT to be more responsive and effective in delivering value – driving value for money whilst reducing operational risk.
- 4.2.4. Berkeley led the work with a new Executive team of a transport organisation to define the business strategy and subsequent Operating Model that would take the business forward from pandemic recovery to operational excellence with growth into new markets. No longer in a full-time role, the Lead has acted as a NED and was subsequently engaged to define the corporate strategy.

4.3. Supplier Selection

- 4.3.1. We worked with a global, highly federated organisation to rationalize their vendor landscape following numerous acquisitions. This included developing a vendor sourcing strategy for the software engineering function of the organisation which formed a template for roll outs to other business areas
- 4.3.2. We have worked with a consumer goods business to determine their core applications strategy. The ten geographical business units had traditionally operated autonomously in technology, so had developed independent platforms for ERP, data & analytics, logistics, planning and much more beside. Berkeley helped business and IT leadership consider the benefits of various vendor options and facilitated agreement on a roadmap to a single global platform and supporting vendor
- 4.3.3. We worked with a global leader in value fashion to rationalise their IT vendor

landscape from multiple to a single managed service strategic IT partner. This included developing a strategy and approach for a single vendor transition in parallel to a completing finance year end and developing a transition methodology to industrialise this process for future transitions

- 4.3.4. We helped to categorise their existing suppliers and define their future vendor management strategy, narrowing a long list of global suppliers down to a rationalised shortlist. This included putting in place improved governance measures and reporting capabilities to manage supplier performance

4.4. Programme mobilisation:

- 4.4.1. We helped a critical government-owned organisation mobilise a programme to replace one of its core, mission critical financial systems. Over the course of 18 months, Berkeley provided a Programme Director, leading a multi-disciplinary team to define the programme scope, business case, target operating model, technical architecture, procurement strategy and transition approach.
- 4.4.2. We developed the full business case for a major UK public service provider to transition to a cloud data platform-as-a-service, and helped mobilise the implementation programme. This will migrate their mission-critical core data warehouse to Google's cloud platform, and also build the organisation's data gathering, management, and business intelligence and analytics capabilities. Other key goals are to halve the technology run costs whilst having greater flexibility and maintainability. We led the evaluation, selection and migration of core HR platforms onto Workday and Cornerstone for a major global company. This involved 170,000 users across 106 countries, including the integration to over 40 payroll providers.

5. Onboarding and offboarding

Onboarding and offboarding of Berkeley support: Our clients tell us that the way we operate is just as important as what we deliver. We adopt a 'client-side consulting' approach where ownership and knowledge is retained by the client team. We believe that this is an essential aspect of this assignment. We recognise that success is as much about 'how' we support mobilisation and early delivery. As well as leading the delivery, our approach will keep you in control, develop your people and grow your team, leaving a strong legacy after we have left.

5.1. Keeping you in control

We will put your ownership of the change at the heart of how we operate. We will operate with you firmly in control throughout, through being inclusive and transparent, taking a 'no surprises' approach.

We will adapt to your culture of decision making, ensuring that we strike an appropriate balance of asserting ourselves where there's delegated authority whilst escalating where there isn't.

5.2. Developing your people

Our clients often report their most rewarding learning and development experiences have been whilst working with us. Our inclusive, easy-to-work-with style naturally supports skills transfer. We will work with initiative

owners and sponsors to ensure that they are able to exercise their accountability for change and feel genuine ownership.

We can support further through our leadership coaching capability. The majority of our partners, and some of our most experienced consultants have professional coaching skills, and have undertaken the Meyler Campbell Business Coach Programme, an award winning, professionally accredited 18-month course of academic and practice-based learning.

Our naturally collaborative approach has not only helped teams and organisations achieve their goals but has enabled individuals to grow and achieve theirs; we are consistently told this is a key differentiator from other consulting firms.

5.3. Growing your team

In parallel with developing your people, we will also support you in building out your capability.

We regularly work with our clients to support recruitment and on-boarding, producing role specifications, liaising with resourcing channels and engaging directly in the selection process, for example designing competency-based interview materials and conducting interviews of potential candidates.

5.4. Vendor Management

Berkeley is expert in managing third party providers as a client-side programme manager. Our people come from SI and 'big consulting' backgrounds and understand complex programme delivery, and so are well placed to sit between our clients and their vendors, both of whom typically find our role hugely valuable.

Our overall approach is:

- to build a one team ethos alongside pinpoint clarity roles and responsibilities
- to build robust but fair supplier contracts, with teeth and clear options for remediating performance
- to manage vendor performance meetings supported by clear, robust balanced scorecard KPIs
- to build robust, inclusive governance with tiered executive partnering for escalation and dispute resolution,
- to build and work to a common agreed plan



6. Service levels

There are no generally applicable service constraints. We will be happy to discuss if there are any constraints relevant to your specific requirements.

7. Information and Data security

We typically work side-by-side with our clients on their sites and on their systems and email. Where necessary to have client data on our systems we ensure information security, integrity, availability, confidentiality and that all legal and regulatory requirements are met, including those applicable to personal data under the Data Protection Act and the General Data Protection Regulations.

Berkeley operates with an ISO27001 certified information security management system (ISMS). The ISMS is regularly reviewed with a commitment for continual improvement. In support of this Berkeley are also Cyber Essentials certified.

Our Microsoft O365 data (SharePoint, Exchange, Office, Skype) is stored in Microsoft's Azure European data centres with their built-in redundancy and security.

Where desirable or necessary, we are happy to share further details of our ISMS.

8. Pricing and Commercials

In keeping with our focus on delivering tangible outcomes for our clients; we offer pricing for our G-Cloud services based on the outputs we provide. We offer a variety of contracting options for these services (e.g. fixed price, time & materials) depending on the agreed scope and nature of delivery. See our pricing document for more details.

Ordering and invoicing, performance of services and liability, and termination are subject to the Berkeley Partnership's G-Cloud 14 Terms & Conditions.