



G-Cloud 13

Service Definition

**Visual Collaboration Solutions (VCS_L), powered by
SharpCloud**

Roelto Ltd

Cloud Software



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1. Introduction

1.1 Company Overview

Roelto, a SharpCloud Business Partner, helps people visualise their data in a way that they can understand, enabling them to collaboratively find answers to their questions. Founded in 2009 and based in London, the organisation provides integrated collaboration and data visualisation solutions and services called R-VCSS (Roelto – Visual Collaboration Solutions and Services), powered by SharpCloud to both the public and private sectors.

SharpCloud Software Ltd was founded in 2012 by the creators of Pertmaster software. SharpCloud is deeply grounded in system thinking, risk and portfolio management. With flexible low code/no code features, SharpClouds dynamic Roadmapping platform effortlessly weaves together data from internal silos, external sources, human insights, and semantically enriched information to answer the most difficult challenges visually and effectively for enterprise organisations. SharpCloud is a sub-contractor to Roelto Ltd.

Roelto Visual Collaboration Solutions, powered by SharpCloud (R-VCS) focus on various user cases such as Strategic Portfolio and Project Portfolio Management, Innovation, Collaboration and Risk Management, Strategy and Technology Roadmaps, and multiple types of online, virtual Workshops. Our aim is to help you connect and align your business Strategy and Portfolio of work, use your data effectively, increase productivity and performance to successfully deliver your strategic objectives and outcomes. Roelto and SharpCloud achieves this by visualising your data and enhancing your collaboration capability using Roadmaps, so you can connect, disconnected Organisations, People, Processes and Systems to uncover insights, and simplify complex business and strategic/project decision making.

1.2 Removing the Disconnect

Roelto's and SharpCloud's target is to improve your strategy execution through people, process and technology by connecting people, processes, systems and data using visual collaborative roadmaps.

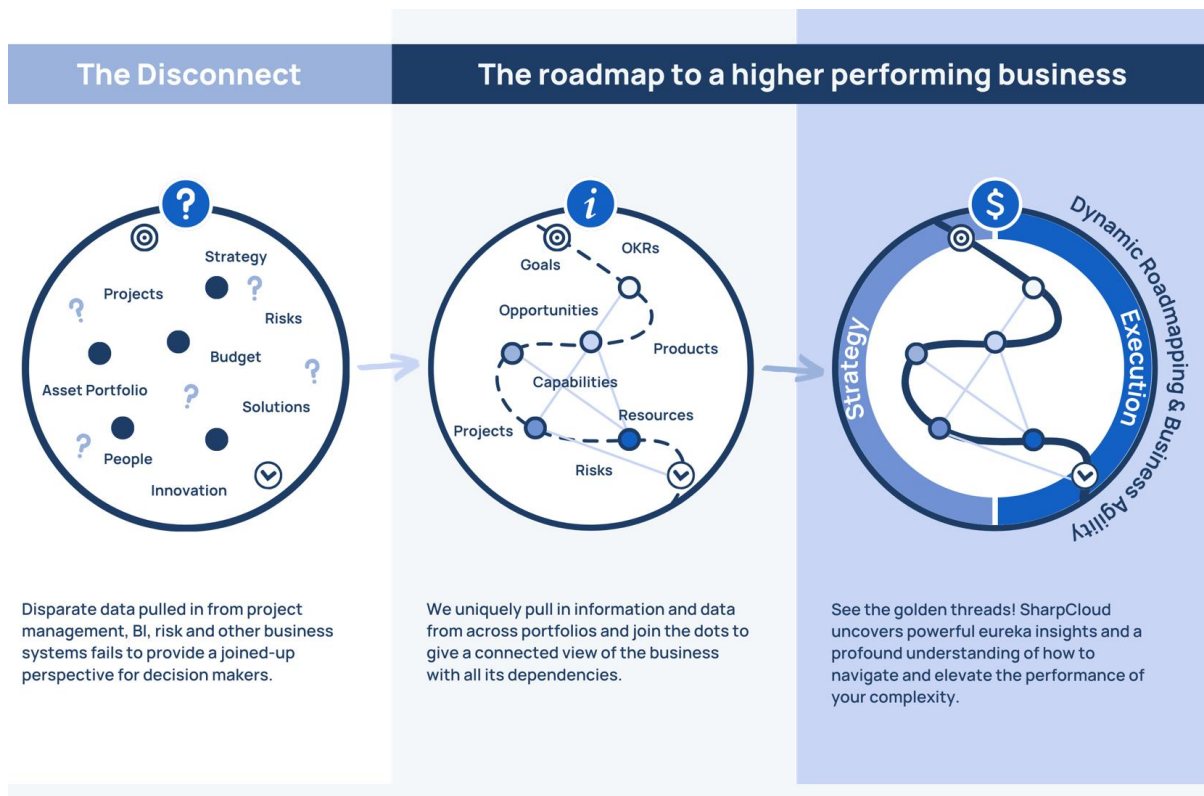


Figure 1 Using Roadmaps to connect your business & improve strategy execution.

1.3 Roelto - Visual Collaboration Solutions (R-VCS_L)

R-VCS_L's are powered by SharpCloud, a Software-as-a-Service (SaaS) platform and can be implemented quickly, in an agile way, whereby collaborative working is established, data is rapidly visualised, and people are able to connect easily. Data, information and knowledge can be combined and shared so that insight is gained to support continuous improvement and high performance. These visual collaboration solutions fill a gap / a disconnect between the Line of Business Systems (LoBS) and the CxO, Executive/Senior Management, which is typically a real problem area for management and leadership.

There are various R-VCS_L you can choose from, which address several common business processes that are typically delivered via the LoBS's along with other common office applications such as spreadsheets, presentations, and emails. Each of the R-VCS_L user cases are preconfigured templates that enables you to start using SharpCloud immediately. Integration to 200+ systems and other collaboration audio-visual and interactive technologies (e.g. interactive touchscreens) can be included, as and when is necessary.

To support people and user adoption on how use these R-VCS_L user cases and other collaboration systems, collaboration support and advice is provided based on ISO 44001 - collaborative business relationships framework specification.

This unique, integrated approach of data visualisation and collaboration enables successful and safe hybrid working/collaboration, whereby you can share your digital content with other people and organisations, saving you time and money.

1.4 Value Proposition

Many organisations have different cultures, ways of working and use various Line of Business Systems (LoBS) such as Finance, Project Management, Risk, Health and Safety, etc. to run their business and work with other people outside of their organisation. This typically results in frustration, very complex, manual processes, multiple meetings, strained relationships, and misunderstandings and multiple “data silos”. It is further compounded by hybrid working and restrictions on how and where you work, countless spreadsheets and presentations that are being continually updated and communicated manually, forcing you to work in a very inefficient way.

The challenge for you is: *How do you work more collaboratively and simplify these processes so you can see and connect this data and information all in one place, to uncover insights and make more informed and timely business/project decisions?*

By combining pre-configured Visual Collaboration Solutions (R-VCSL), powered by SharpCloud with a collaborative working approach, delivers a complete solution to help you deliver your strategic outcomes successfully. You will be able to:

- Create Clarity
- Generate a Connected Enterprise
- See The “Golden Threads”
- Get a 30,000 foot view

As a result, this will help you to work and deliver strategic initiatives, projects, programmes and “business as usual” activities” successfully, by increasing productivity, team performance and focussing on outcomes, thereby increasing value for money. Furthermore, being able to unlock your “data silos” reduces the frustration of not being able to use your data. Instead, you will be able to view different public sectors, functional teams, programmes and strategic initiatives, their inter-relationships using standard data attributes that will help you to uncover insights and make more informed business decisions.

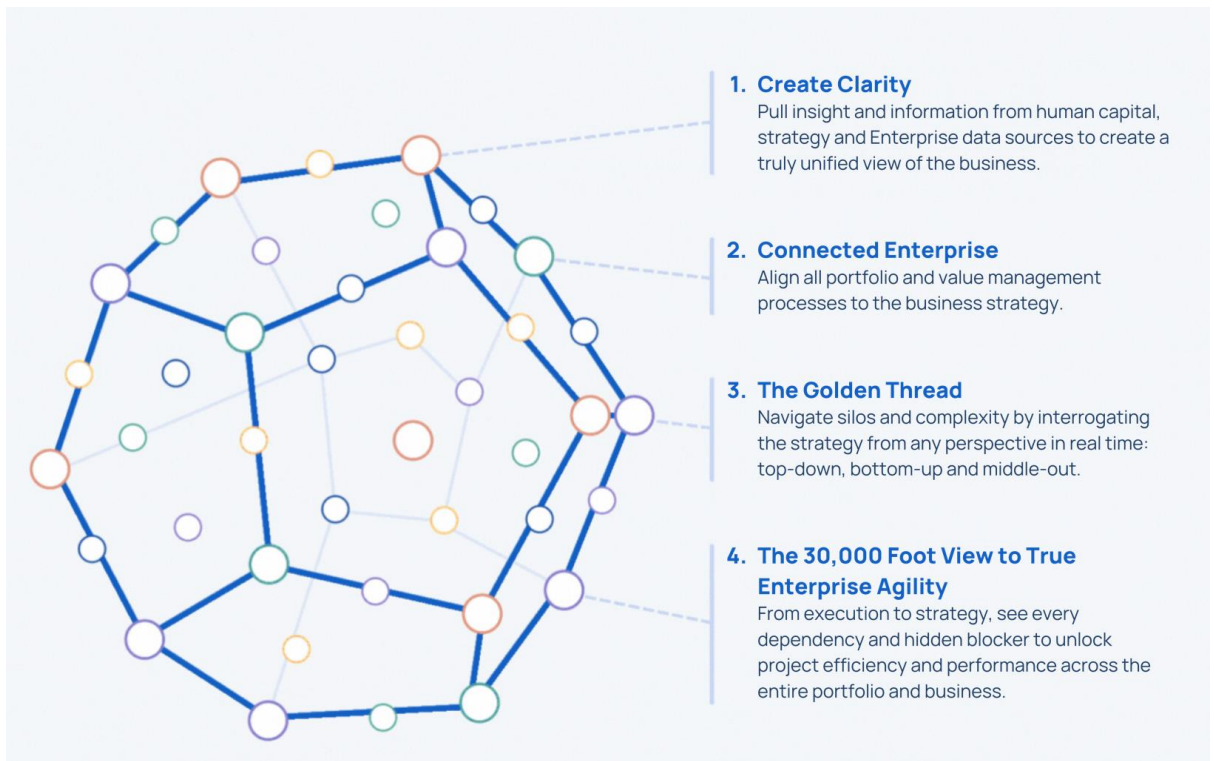


Figure 2: What makes SharpCloud unique.

Typically, you can expect to save +50% on time in collating data, visualising it and sharing it with your “audiences”.

In Figure 3: 3D View of Business Strategy, shows multiple business functions, products and strategic initiatives being viewed against Benefit, Compliance Status and Cost, along with colour coded priority relationships.

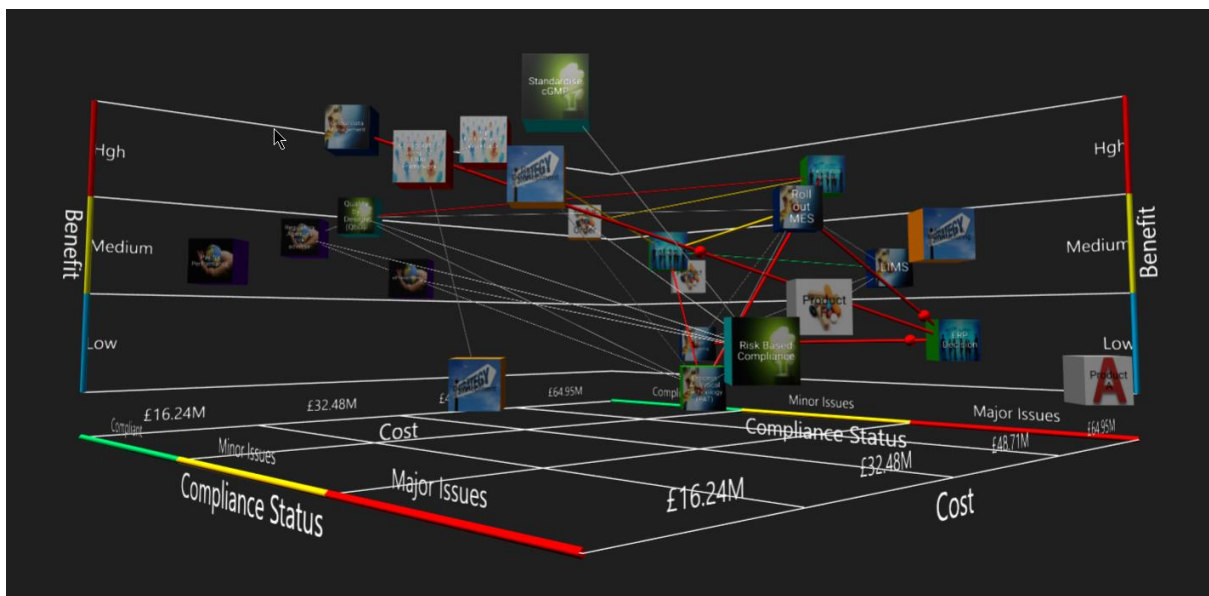


Figure 3: 3D View of Business Strategy

R-VCSL / SharpCloud is a SaaS, which is aligned to the “cloud first policy” published by Government Digital Service. A recent speech from Infrastructure and Projects Authority (Jan 2020) identified that although there has been good

delivery of projects and programmes there is still a need to “fix the project delivery system”. This focussed on the three P’s – People, Principles and Performance, to improve the effectiveness of delivery and provide better outcomes for citizens. There are other guidance documents such as the “Government Functional Standard (Govs 002: Project delivery) – Portfolio, programme and project management”, all which R-VCS_L and SharpCloud can support.

At a local government and district council level, R-VCS_L and SharpCloud can help facilitate cross collaboration and simplified decision making.

The combination of our collaborative hybrid working approach with R-VCS_L user cases, powered by SharpCloud provides you with the opportunity to be “meeting the governments ambitions, driving better decisions and increasing the likelihood of successful outcomes”.

1.5 What the Service Provides

- SharpCloud Platform
- Pre-configured SharpCloud Solutions
 - R-S/PPM: Strategic and Project Portfolio Management
 - R-DBR: Dashboard Reporting
 - R-CaaS: Collaboration-as-a-Service (ISO 44001)
 - R-WaaS: Workshop-as-a-Service
 - R-IMP: Innovation Management Platform
 - R-SCRUM: Agile Working
 - R-SRM: Strategic Roadmap
 - R-TRM: Technology Roadmap

The SharpCloud platform allows for the configuration of various solutions including R-S/PPM, which encompasses modules for Health and Safety, Planning, Risk Management, Costs, Benefits, Dependencies, Resources, and Reporting/Dashboards, with options for standalone applications in Risk or Benefits Management. As new R-VCS_L applications are developed, they become available for purchase, expanding the utility and applicability of the platform. Users have the flexibility to use these solutions as provided or customise data attributes and views to align with their existing data models, business processes, and specific interaction preferences with data.

Bespoke applications can be created using the SharpCloud platform.

Support is included (refer to individual R-VCS_L user cases in the Pricing Document) to help you configure your user case and align your data model, modify calculations and views as part of the initial set up and training of “Creators”. Further support can be provided as required.

By using R-VCS_L and SharpCloud you will realise several key benefits and outcomes:

- Save time, effort, and costs by eliminating non added value administration tasks.

- Deploy quickly in a managed, agile, and incremental way from a local to enterprise-wide implementations, including external partners where necessary.
- Increase engagement of people in a very collaborative and visual way across several common business processes that span multiple users and various audiences, both internally and externally.
- Improve your data integrity by aligning your data model, so everyone can see the same information and compare “apples for apples” bringing clarity, common understanding and the ability to simplify complex decision making.
- Create a “One Place” for people to view, share information, dynamically interact, and make near to real-time decisions.
- Repurpose and integrate existing data, solutions (e.g. PowerBI) and content, removing duplication and storage of multiple files, thereby increasing performance and productivity.
- Develop “Golden Threads” and gain insight to facilitate proactive decisions, minimising risk and take full advantage of opportunities.
- View and combine your data instantly using the multiple views and filters to help you gain insight and support continuous improvement.

1.6 Overview of the G-Cloud Service

The following provides an overview of each R-VCSL and the SharpCloud Platform.

1.6.1 SharpCloud

SharpCloud is a visual collaboration roadmapping platform that delivers Strategic Portfolio Management solutions. It can reveal and visualize hidden dependencies and creates connected networks of information and insight that quickly answer complex questions behind countless strategic processes.

It connects and integrates your business strategy and portfolio of work (projects) to ensure that both planned strategy (top down) and emergent strategy (bottom up) are aligned and connected, significantly reducing the impact of operational complexity. Figure 4 The impact of operational complexity.

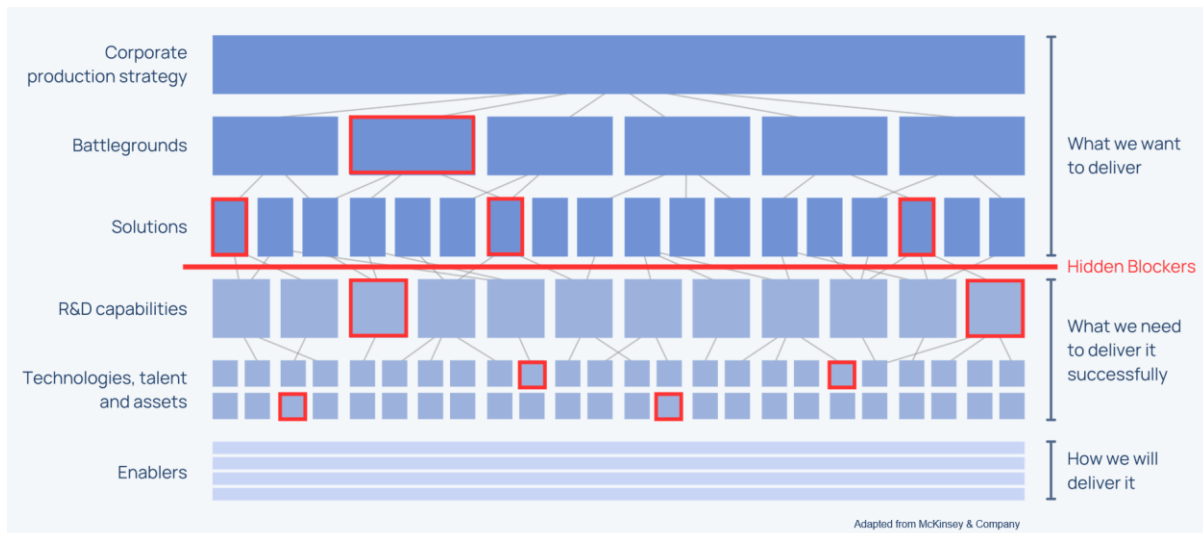


Figure 4 The impact of operational complexity.

1.6.2 Visual Collaboration Solutions, powered by SharpCloud

1.6.2.1 R-S/PPM: Strategic / Project Portfolio Management

Strategic Portfolio Management (SPM) involves the selection, prioritisation, and management of a corporation's projects and programs in alignment with its long-term strategic objectives. Project Portfolio Management (PPM) focuses on managing a collection of projects to ensure they meet organisational goals and are delivered efficiently, often involving the allocation of resources, scheduling, and performance tracking across various projects.

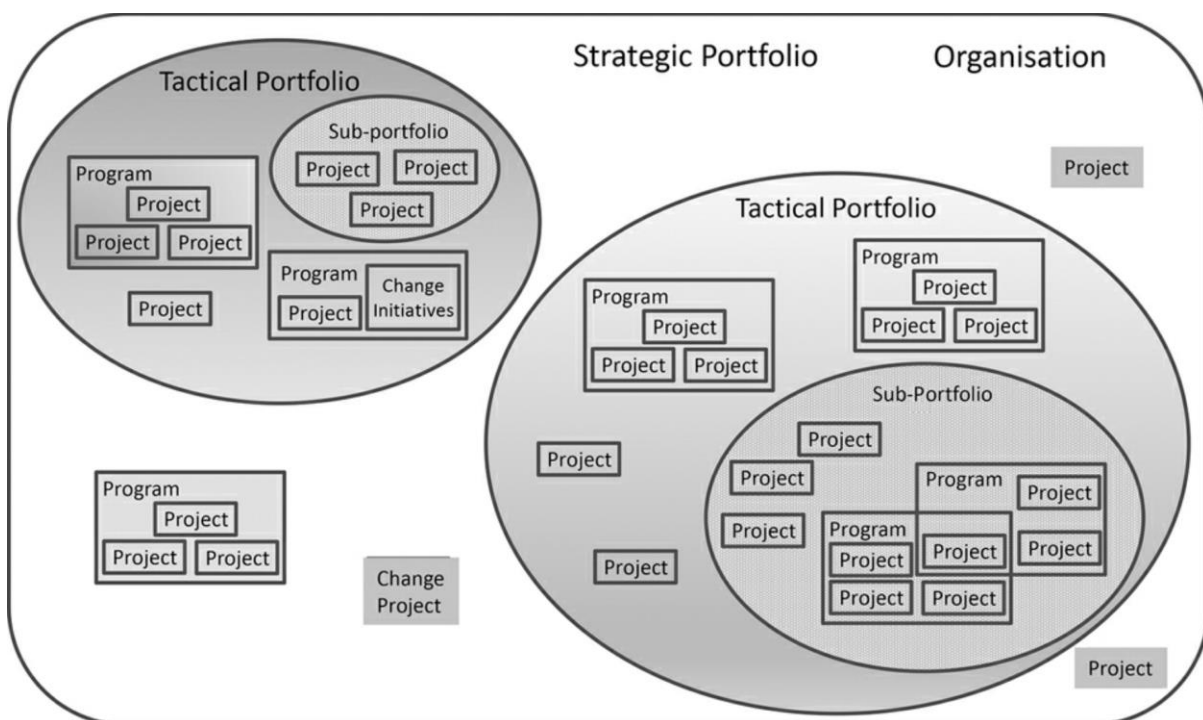


Figure 5 Strategic Portfolio Management (SPM)

R-S/PPM is adaptable across various sectors, using standardised strategy/project templates and data attributes to ensure consistency in strategic and project alignment and management, whether it's construction, IT, or transformation programs. It integrates key data from various sources like SAP, Excel, MS Project and other systems into projects through manual or automatic uploads, or direct entry via online forms, and populates dedicated views for each project area.

R-S/PPM provides a suite of standard views including dashboards for overall strategy and project portfolio status, timelines for project activities and milestones, financial summaries, risk matrices, and more, all aimed at enhancing project tracking and management. Additionally, it features specialised views for dependencies, benefits alignment, resource planning, project changes, documentation status, action tracking, strategy / project highlights, and review records to facilitate comprehensive strategic, operational and tactical oversight and continuous improvement.

Using R-S/PPM you can very quickly start your Strategic Portfolio Management for multiple projects, programmes and portfolios, all linked to your business plans and overall strategy. The example in Figure 6: R-S/PPM Solution shows the overall configuration and data flows.

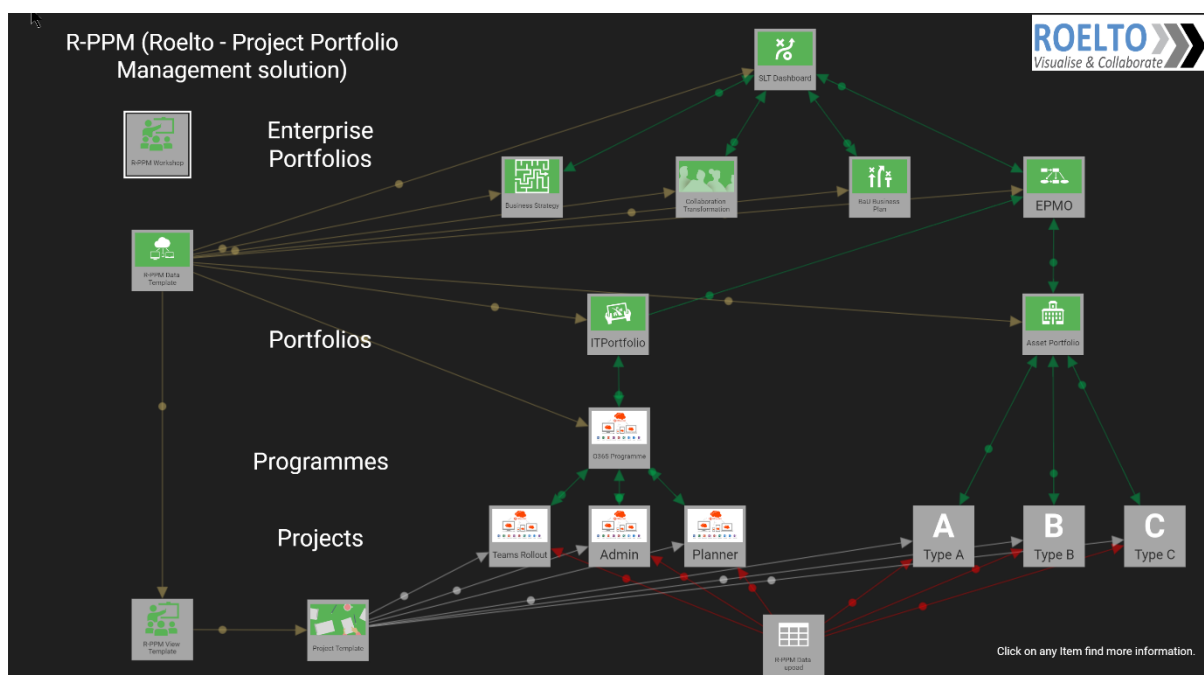


Figure 6: R-S/PPM Solution

1.6.3 R-DBR: Dashboard Reporting

R-DBR streamlines the process of consolidating reports from various groups by providing an online form for data entry, which automatically updates dashboards and performs necessary calculations. This system can serve as a simple standalone solution or be expanded with templates for enterprise dashboards, enhancing visual communication and project status tracking across multiple teams and stakeholders.

Below is an example of a dashboard for a global IT project being deployed to over 46 countries which simply shows the project status of all projects and acts as a visual

dynamic communication tool to all stakeholders. The user can click on each country, and several panels of information will be displayed (see Figure 8).



Figure 7: High Level Dashboard

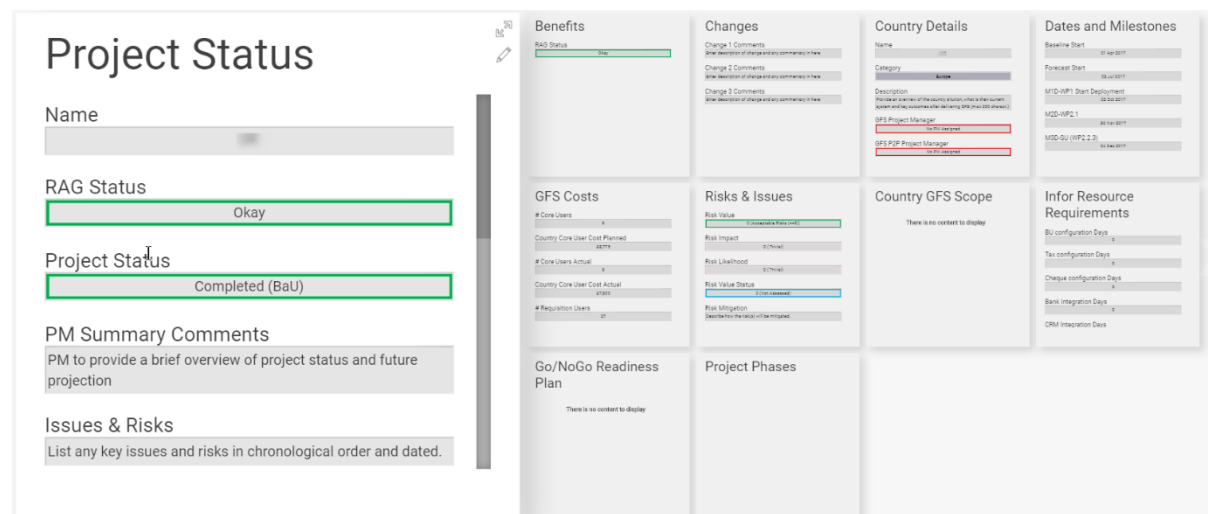


Figure 8: Data attributes for a project.

1.6.4 R-CaaS: Collaboration-as-a-Service

R-CaaS enhances collaboration internally and with external partners by offering a comprehensive suite of tools, templates, and processes aligned with ISO 44001 standards for collaborative business relationships. Key features include a Collaboration Gap Analysis (Refer to Figure 9), a Roadmap, and a Relationship Management Plan, which are supported by other tools within R-CaaS to systematically address and manage collaboration gaps and relationships.

The suite also includes tools for stakeholder management, knowledge mapping, assessing collaboration maturity, and innovation, which are integrated into dynamic, interactive formats rather than traditional static documents. Additionally, R-CaaS provides collaboration dashboards that visualise the progress of collaboration transformation programs and the status of relationships with business partners.

ISO 44001 Collaboration Gap Analysis

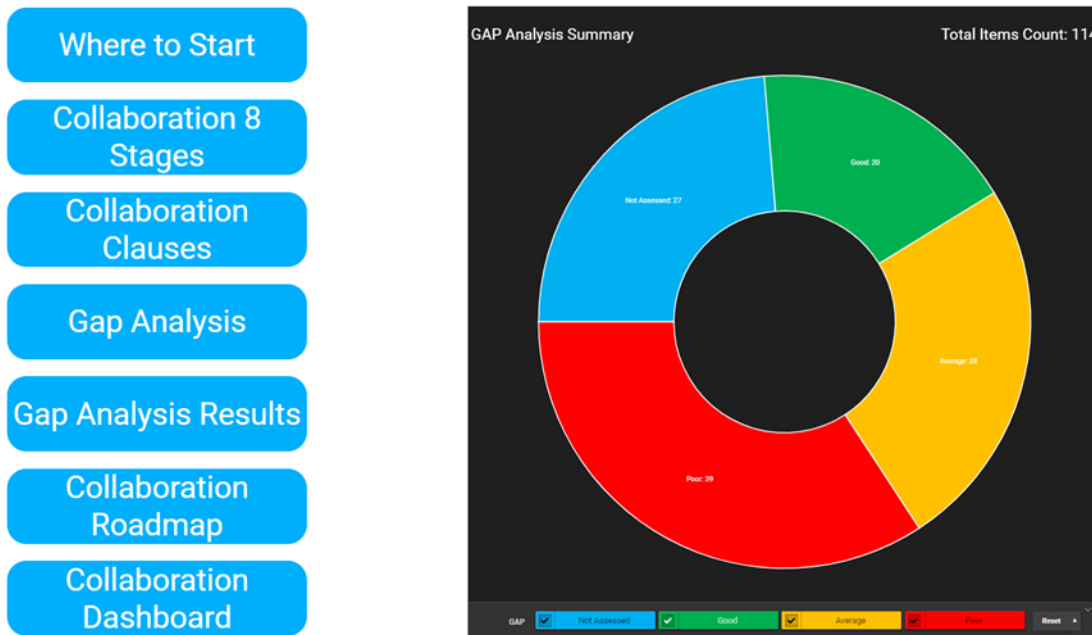


Figure 9: ISO 44001 Gap Analysis Dashboard

1.6.5 R-WaaS: Workshop-as-a-Service

Hybrid working, crucial for advancing projects and strategies, often suffers from inefficiencies that lead to increased costs and lost momentum. R-WaaS combats these issues with pre-configured online templates for workshops and meetings, supporting immediate review and ongoing virtual collaboration. The platform includes a variety of analytical and strategic planning tools such as SWOT, GAP, PESTLE analyses, Strategy Maps, and workshops for stakeholder management, strategy and technology roadmapping, long-term planning, process simplification, and performance management.

1.6.6 R-IMP: Innovation and Management Plan

R-IMP facilitates innovation and continuous improvement in business performance by enabling collaborative idea creation and prioritization, followed by an agile development process through stages like research, concept development, prototyping, testing, and implementation.

1.6.7 R-SCRUM: Agile working

Working in a linear left to right, “waterfall” way has been shown to be unpredictable, taking more time and cost to complete. SCRUM is a recognised agile way of

working to help improve predictability, performance and feedback to continually improve and deliver minimal viable products in 1 to 2-week sprints.

1.6.8 R-SRM: Strategy Roadmap*

Strategy formulation varies based on the specific questions an organization aims to answer, addressing aspects such as business model, technology investments, market competition, and operational alignment within teams. R-SRM offers a structured approach with a focus on Market, Technology, and Finances, providing tools to develop and rapidly implement business strategies in an agile manner. The platform supports continuous strategy improvement and monitoring through dashboards and balanced scorecards that track progress and performance.

The use of other R-VCS_L such as SWOT, PESTLE, Strategy Map, Long Term Planning, etc. as listed in R-WaaS can be used to develop your Strategy Roadmap.

Figure 10: Example of Strategy Roadmap - continuous manufacturing is an example of a Life Sciences Strategy Roadmap, filtered for a Continuous Manufacturing scenario. This shows the dependencies (relationships) which are colour coded to show Priority and the cost of the relationships by thickness with the overall cost total in the top right-hand corner.

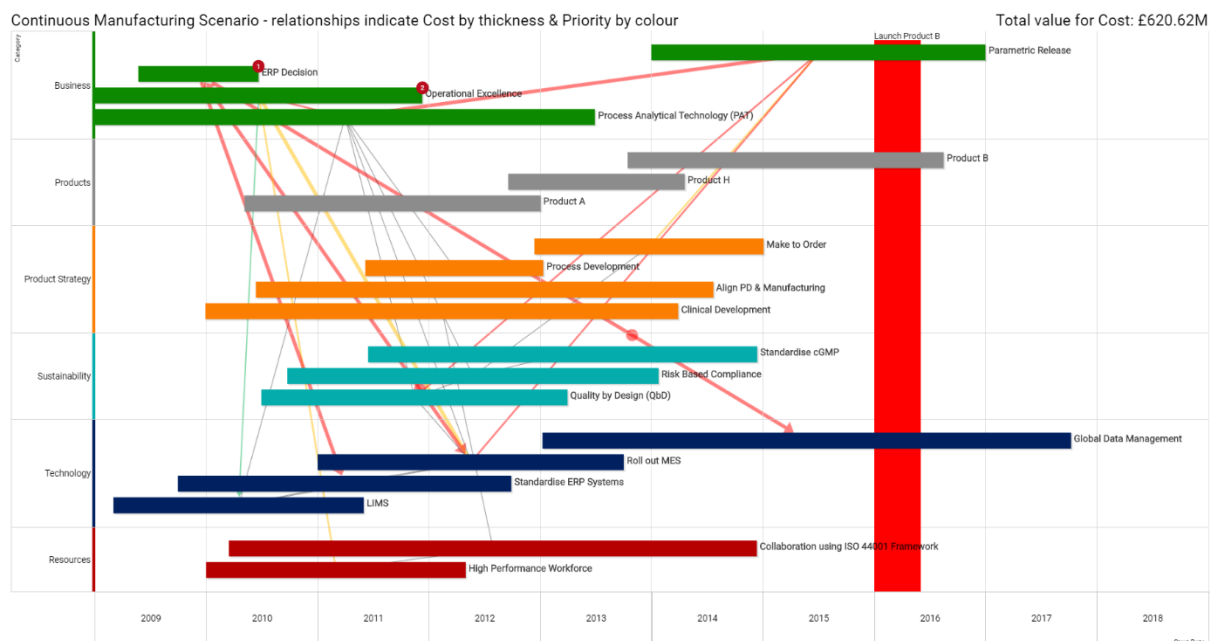


Figure 10: Example of Strategy Roadmap - continuous manufacturing

1.6.9 R-TRM: Technology Roadmap*

Although you can develop your Technology Roadmap independently, it is a subset of your Strategy Roadmap. Specific technology outcomes, products, etc can be shared and inherited into your Strategy Roadmap, including ideas from your R-IMP. Through real time collaboration, your R-TRM is a dynamic roadmap and will be evolving as circumstances change. These changes provide guidance and direction which can be linked to your projects in your R-PPM.

R-TRM is based around the following 3 main categories:

1. Business / Market
2. Product / Service
3. Technology

There are many types of roadmaps with regards to format and purpose. Example of roadmap layouts can be viewed here, [R-TRM Examples](#)

Figure 11: Technology Roadmap, with dependencies and Risk status shows a filtered view of a Technology roadmap with dependencies and each technologies Risk status as a RAG border.

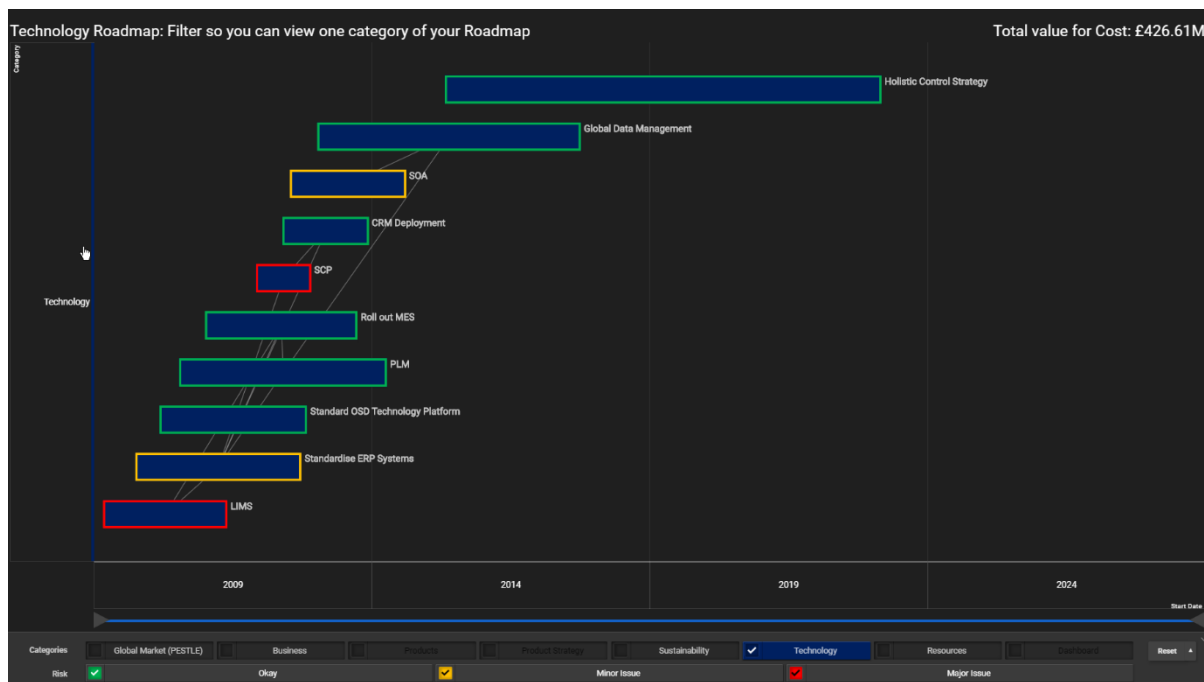


Figure 11: Technology Roadmap, with dependencies and Risk status

*The R-SRM and R-TRM solutions use the Institute for Manufacturing, Cambridge University T-Plan methodology for developing roadmaps.

1.6.10 Standard SharpCloud Functionality

Details of the standard SharpCloud functionality can be provided on request

1.7 Associated Services

Additional consultancy and support can be found in Roelto's Cloud Support offering.

1.7.1 VCS Configuration

With each VCS, there are a fixed number of configurations, parametrization and training days included in the cost. If, however, you require additional functionality, views, integration, training or require data cleansing and management, this can be provided as a separate scope and cost.

1.7.2 SharpCloud Configuration

Roelto has been delivering SharpCloud solutions since 2009. Specific SharpCloud applications and solutions can be provided based on the thousands of stories which have been delivered to date. An initial ½ day workshop is completed to determine key requirements and outcomes. The following 7 steps will be completed. Refer to Roelto's Cloud Support Service Definition document.



Figure 12 SharpCloud Configuration Steps

1.7.3 Collaboration Consulting Services

Our VC and SharpCloud solutions rely on quality data, effective adoption, and appropriate collaboration behaviours, which are fostered through our collaborative consulting services. These services include coaching to value and manage data correctly, facilitating change through stakeholder management and benefits mapping, and applying the ISO 44001 framework to clarify roles and simplify processes. This approach ensures that collaboration solutions are appropriately used, operated, and maintained, enhancing overall effectiveness.

1.7.4 Training

Refer to the section 3.5 Training

1.7.5 Maintenance and Support of VCS_L

Refer to the section Training.

1.7.6 Application Programming Interface (APIs) / Integration

SharpCloud provides over 200 data connections to other systems and data sources.

Development of specific APIs and integration to other applications are not included. A separate proposal shall be provided upon request.

Several data connectors to Excel, SharePoint, PowerBI, DevOps, Primavera and other tools are included. A complete list can be provided upon request.

Access to the SharpCloud REST API (ODATA) is included with an active SharpCloud subscription. For more information, please click [here](#)

1.7.6.1 Downloads

SharpCloud downloads are available and included and can be accessed by clicking [here](#)

2. Data Protection

R-VCS_L uses the SharpCloud service and includes the following data protection features.

2.1 Information Assurance

2.1.1 SharpCloud

- ISO 27001 accreditation
- Microsoft Gold Partner - SharpCloud is a Certified Partner in the Microsoft Partner Program, with Gold Competency in Application Development and Silver Competency in Cloud Platform, specialising in the provision of SaaS solutions for Microsoft Azure.

2.1.2 SharpCloud Service

The VCS_L are delivered via SharpCloud which can be hosted in 3 different ways. Refer to SharpCloud Terms and Conditions for further details
<https://www.sharpcloud.com/terms>

Further details can be provided upon request.

2.1.3 Data Centre Security

SharpCloud

(<https://my.sharpcloud.com>, <http://eu.sharpcloud.com> and <http://uk.sharpcloud.com>) uses the Microsoft Azure platform to host the application, database and file storage. The Azure Platform as a Service (PaaS) is designed from the ground up to be secure, stable and scalable. It is created and managed by Microsoft, and SharpCloud have no direct physical access to the datacentres. SharpCloud data can be hosted in the North US region, the Netherlands and the UK, and Azure is available in many regions around the globe.

For further information on Microsoft Azure security click this link to the document from the Microsoft website: <http://azure.microsoft.com/en-us/support/trust-center/security/>.

2.1.4 Data Protection

All the data transmitted to SharpCloud is stored on multiple disks to ensure against any hardware failure. Continuous backups provide a mechanism to restore data to any point in time over the past 30 days. Files uploaded within the application are stored on servers that use precautions for bottle necks, points of failure and unauthorised access. Data is encrypted at rest (AES 256).

2.1.5 Secure Socket Layer (SSL)

SharpCloud uses SSL (AES 256) for all the user interaction with the application, so the information in transit between your computer and our servers is encrypted and sent using HTTPS.

2.1.6 Backups

The R-VCSL applications, user case configurations and data are backed up as part of the SharpCloud service. SharpCloud uses Microsoft Azure PaaS to make sure the SharpCloud service is always available. Each server is duplicated (twice as a minimum, sometimes more) meaning if one should fail for any reason a backup is available to provide uninterrupted access. The platform itself is constantly patched updated to the latest versions and allows SharpCloud to continually develop and deploy new versions of SharpCloud software without any interruption to the service.

2.1.7 Business Continuity statement/Plan (BCP)

The following business continuity plan is in place and covers the following sections:

1. **Purpose** – this sets out what the BCP aims to address to ensure continuity of service in a safe, organised and managed way. The BCP is developed and maintained by completing the following steps:
 - a. Risk and Impact Analysis
 - b. Develop and maintain processes, procedures and people training to maintain critical business and project functions
 - c. Establish and support Roelto Continuity Team to manage and deliver the BCP
 - d. Develop and deliver necessary training for business and project team members
2. **Scope and Applicability** – the BCP is applicable to all Roelto projects and services which are currently in deployment or live (in production) and includes project and support team members. The scope of the BCP covers:
 - a. Safety and wellbeing of people
 - b. Coordination with clients and critical business partners (e.g. SharpCloud)
 - c. Impact on current and future projects/solutions
 - d. Risk Assessment and impact assessment, including mitigation
 - e. Organisation and people roles and responsibilities
3. **Definitions** – list of all acronyms and phrases
4. **Responsibilities** – table of positions/organisations with list of roles and responsibilities
5. **Related Documents** – table of reference documents to refer to
6. **Business and Project Risk and Impact Analysis** – a time, operational and financial Risk and Impact analysis will be completed periodically and maintained

7. **Business Continuity Procedures** – a list of key procedures highlighting their purpose and links to them so that they can be accessed and used when required.
8. **Training** – specific training to support the business continuity procedures in section 7.

2.2 SharpCloud

SharpCloud public cloud, multi-tenant instance is available on Microsoft Azure offering 99.95% availability. Thereby delivering minimal downtime.

SharpCloud can also be hosted on-prem.

More information can be provided to the buyer on request.

2.3 Privacy by Design

Within the Roelto consultancy and professional service terms and conditions document, (Schedule 3 Data protection), details are provided, and the following steps are included with regards to GDPR and the data processing and security details which shall be gathered and agreed before a project/Work Order commences. These include:

1. Subject matter processing
2. Duration of processing
3. Nature and purpose of processing
4. Type of personal data
5. Categories of Data Subjects
6. Specific processing instructions

3. Using the service

3.1 Ordering and Invoicing

A meeting will be held to understand the requirements and determine which VCS_L application(s) and SharpCloud users licenses are required.

To initiate the process please email info@roelto.com and include the following information for each solution you require:

#	Requirement	Response
1	Select the R-VCS _L you require. If more than one, please complete a separate form.	
2	List key functionality you require and or the issues/challenges you need to resolve	
3	What date do you require your VCS _L to be available	
4	Number of users per VCS _L	
5	Name of requestor	
6	Email address	
7	Position / Role in organisation	
8	Address of location where VCS _L will be managed	
9	List location of all users, including number of users at location(s).	

You can complete this form online by clicking [here](#)

Further assistance will be provided once the initial meeting has been completed along with the information specified above.

3.2 Pricing Overview

The pricing structure for R-VCS_L is made up of 3 parts which are listed below. The list of costs is detailed in the separate R-VCS_L pricing document.

3.2.1 R-VCS_L User Cases

Each R-VCS_L user case has an annual fixed cost, which includes the pre configuration of data, view and user case templates so that you can start using immediately. Each R-VCS user case includes a fixed number of days depending on complexity, to provide onboarding, training and deployment support.

3.2.2 SharpCloud Subscriptions

Each user requires a SharpCloud subscription to use the SharpCloud service. The subscription provides full functionality and access to all R-VCS_L user cases and other SharpCloud stories and templates that have been shared with the user. This also includes SharpCloud service support. **Purchase of SharpCloud subscriptions need to be bought from SharpCloud directly.**

3.2.3 R-VCS_L Support

Additional consulting support can be provided during deployment or after a user case has gone live, e.g., additional configuration. After a R-VCS_L user case has been implemented post deployment support, Service Levels 2 and 3, can be provided on request. Refer to Roelto Pricing document for support costs.

An example is provided below based on using SharpCloud Public Cloud Service.

#	Item	Quantity	Unit Cost GBP	Total Cost
1	R-TRM (Technology Roadmap) *	1	25,000	25,000
2	SharpCloud Subscriptions**	50	750	37,500
3	R-VCS Support Level 2 Silver	1	@10% of R-TRM	2,500
3.1	Enable (days)	10	725	7,250
3.2	Initiate or Influence (days)	5	1,200	6,000
	Total (excluding VAT & expenses)			£78,250

Table 1 Example of R-VCS_L costs

*Annual Roelto VCS_L subscription

**Annual SharpCloud subscription.

3.3 Availability of Trial Service

A free ½ day workshop is provided to deliver an introduction and overview of the various VCS_L and SharpCloud service.

A 2 to 3-week Proof of Concept (PoC) is provided which shall typically focus on a specific VCS_L (user case). The PoC will be completed with agreed deliverables and outcomes. A PoV/C is completed before purchasing annual subscriptions during which, requirements are collected and a high-level concept for solutions is designed and gap analysis completed using a VCS_L template to validate benefits.

The following will be completed:

- Gap Analysis against a VCS_L solution(s) – identify what needs to be modified and added
- “Start with Why”
- Define Success Criteria
- Prep for pilot
- Stakeholder engagement

Once the PoC is completed a Pilot phase will start and shall be delivered using the R-SCDM (Roelto – SharpCloud Deployment Methodology).

3.4 On-Boarding, Off-Boarding, Service Migration, Scope etc.

3.4.1 On Boarding

During the PoC, Prep for Pilot activity, key roles and responsibilities will be defined including ADMIN role. This will include the management of subscriptions (users) in the system using the online Manage Licenses. Online training can also be provided and will be supported by a Standard Operating Procedure (SOP).

3.4.2 Off Boarding

The ADMIN will be responsible for de-selecting users if they leave or no longer require access to the service. The Pack Administration portal allows any number of users up to the number of subscriptions purchased.

3.5 Training

Training is provided for any of the VCS_L listed above, including how to use SharpCloud and an introduction to ISO 44001 collaborative business relationships. There is also SharpCloud Accreditation Part 1 and 2 training. The training is typically delivered as part of the delivery for each solution and during the onboarding of users. A training plan is provided for each deployment and includes a fixed number of days. Refer to the pricing document for more details. Additional support content can be provided at an additional cost such as Standard Operating Procedures and videos all of which will be provided online as part of the solutions.

The following standard training products are provided at an additional cost. Refer to the Roelto pricing document for the following training costs:

1. Navigating SharpCloud

2. SharpCloud Accreditation – Part 1
3. SharpCloud Accreditation – Part 2
4. SharpCloud Overview 1Day Training
5. SharpCloud Overview and PoC 2 Day Training
6. Online SharpCloud Training - 10 online sessions
7. ISO 44001 Awareness 1Day Training
8. ISO 44001 Gap Analysis - 1Day
9. ISO 44001 Awareness and Relationship Management Plan - 2 Day Training

Tailored training can be delivered upon request.

3.6 Implementation Plan

The implementation plan will typically take 3 months or less and will follow Roelto VCS_L Deployment Plan. The time to deploy will depend on the VCS_L Gap Analysis and the degree of updates and parametrisation that will be required.

The following provides an overview of key features and benefits of the Roelto VCS_L Deployment Plan, including our approach, typical delivery stages and methodology.

A more detailed implementation plan can be provided to the buyer on request.

An Integrated Transformation Approach is taken incorporating the Roelto SharpCloud Deployment Methodology (R-SCDM).

Integrated Transformation Approach

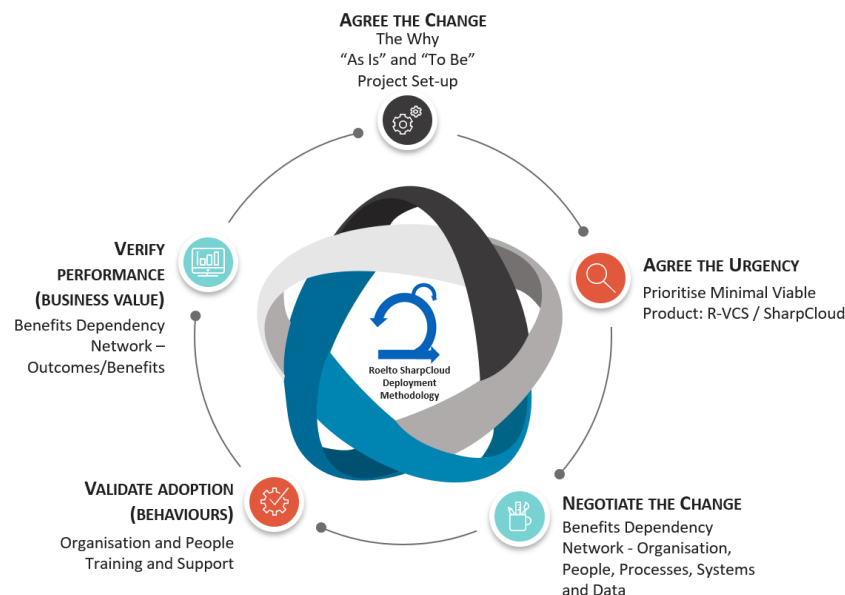


Figure 13: VCS_L Integrated Transformation Approach

Our aim is to ensure every R-VCS_L onboarding and solution is a success. This is achieved by developing a Client Success Roadmap which includes investment in time and effort from all parties as illustrated in Figure 14: Client Success Roadmap.

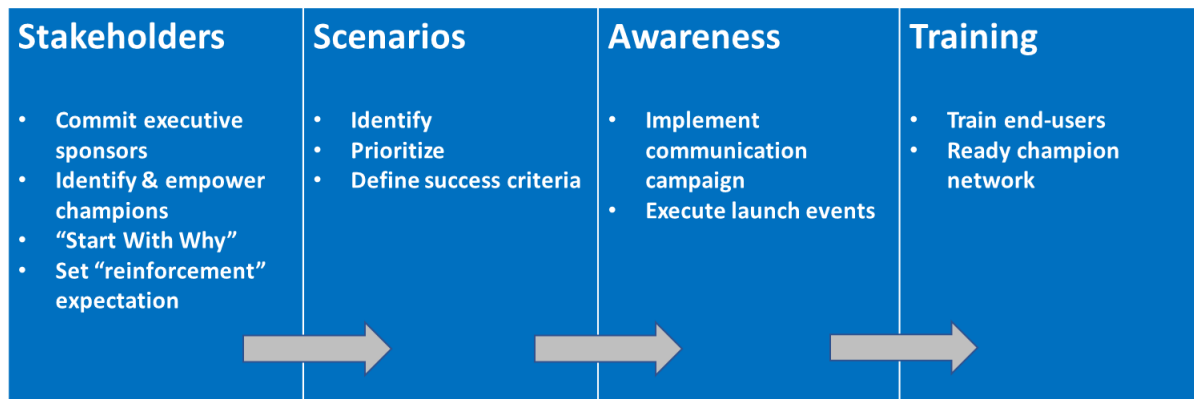


Figure 14: Client Success Roadmap

3.6.1 Four Step Deployment Approach

Our Integrated Approach and Services Delivery Model works alongside the Client Success Roadmap and takes a 4-step approach to ensure the project is a success whilst minimising risk to all parties as the project proceeds:

1. **Discovery Workshop** – a free ½ day workshop
2. **Proof of Concept** – this will typically take 2 to 6 weeks.
3. **Pilot / Phase 1** – completed in 1 to 2 weeklong sprints with 3 iterations followed by a soft launch and then a Go Live.
4. **Support** - After Go Live the solution will go into support. Refer to the service levels for more details.

3.6.2 Roelto – SharpCloud Deployment Methodology (R-SCDM)

Figure 15: Roelto SharpCloud Deployment Methodology – SCRUM, illustrates the R-SCDM model during the Proof of Concept, Pilot and ongoing deployment of R-VCS_L products.

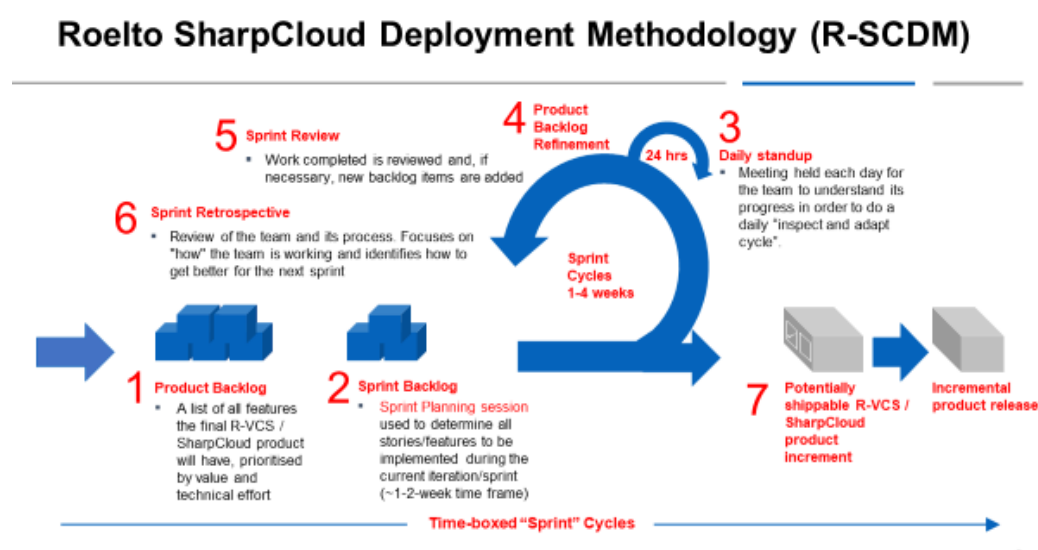


Figure 15: Roelto SharpCloud Deployment Methodology – SCRUM

R-SCDM is an agile (SCRUM) methodology that will be used where appropriate to complete the WP's and develop the MVP during the Project. The overall delivery for the user/client onboarding process is illustrated below in Figure 16.

Delivering the Client Onboarding Process

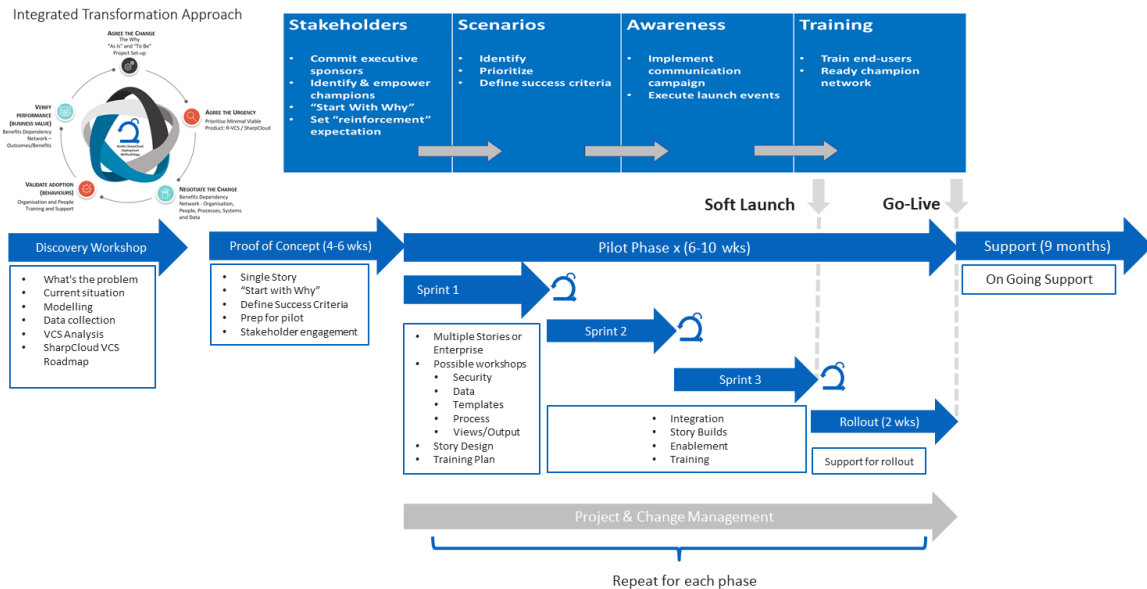


Figure 16: High Level Implementation Plan and Onboarding Process

3.7 Service Management

Roelto has a Quality Management System (QMS) which includes documented instructions, guidelines and templates to support the delivery of services and solutions. Figure 17 identifies the SharpCloud Work Breakdown Structure and key Work Packages.

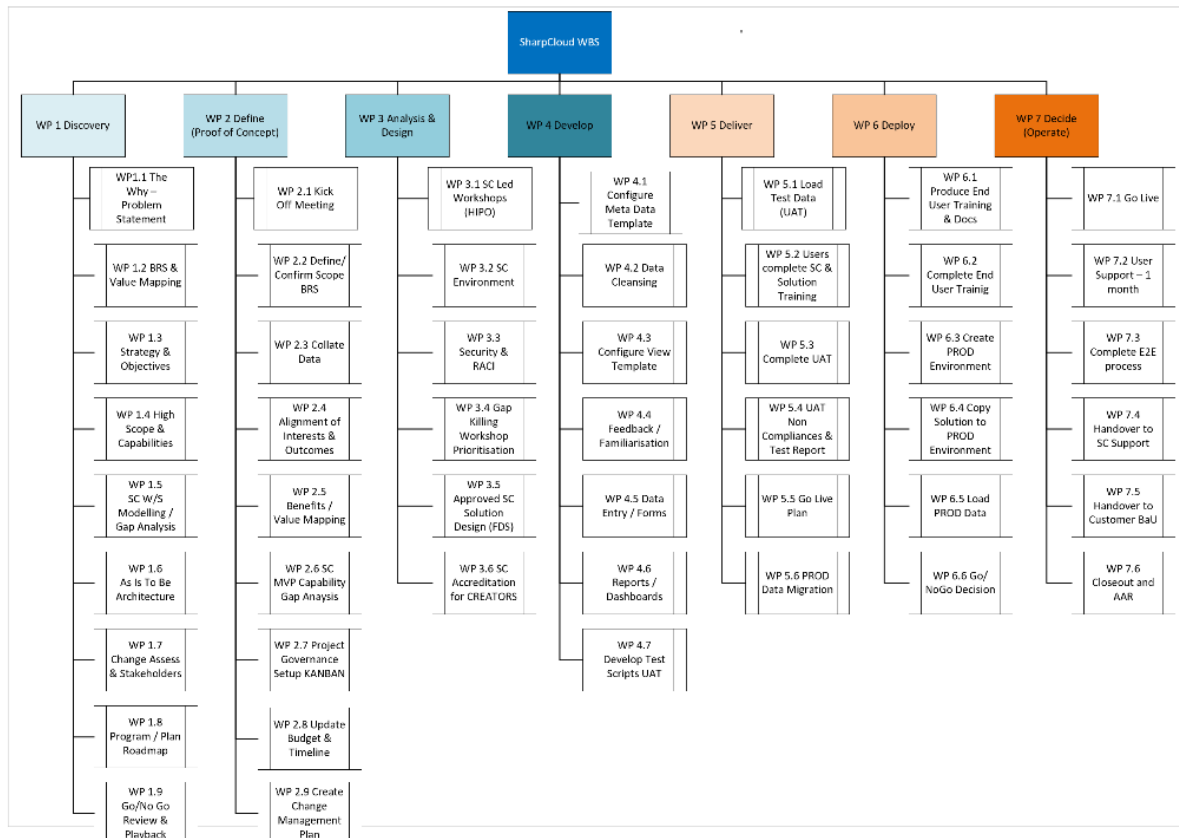


Figure 17: Roelto SharpCloud WBS

3.7.1 VCS_L solutions

An assessment of maintenance and customisation of all installed VCS_L solutions will be completed as part of the handover to business-as-usual support. Depending on the complexity (single solution (story) to integrated multi solutions) including criticality of solutions, a service management guideline will be provided. This will include the set-up of a Development, Testing and Production teams (environments).

3.7.2 SharpCloud Service

Refer to SharpCloud service management terms and conditions.

3.8 Service Constraints

Service and support are provided as per the details listed in section 3.9 Service Levels.

When a VCS_L / SharpCloud solution has been implemented and signed off against the agreed outcomes there are no constraints to a user modifying a VCS_L / SharpCloud configuration there afterwards e.g., adding additional data attributes, views, or calculations. Roelto takes no responsibility for these changes or impact that they may have on the approved VCS_L / SharpCloud configuration when handed over as part of User Acceptance Testing and or handover.

Further configuration and support can be provided by Roelto on request for a completed and accepted VCS_L/ SharpCloud solution.

3.9 Service Levels

Maintenance and Support can be provided for all R-VCS_L if required. There are 3 levels of support:

3.9.1 Level 1 – Standard S_v

Questions, issues, support and service requests related to a purchased VCS_L can be raised on the [Roelto External Service Desk](#). Online support will be provided and excludes any additional configuration, set up or modification to the installed solution(s). Level 1 support is free to existing R-VCS_L users and will be responded when support is available.

3.9.2 Level 2 – Silver S_v

Provides all of Level 1 support and will be responded to within 24 hours or less – during UK working hours 9am to 5:30pm Monday to Friday, excluding UK bank holidays. Maintenance of VCS_L such as user/pack management, data and view templates are provided and will include up to 0.5 day per month. Level 2 support is provided as an additional cost. Refer to the Roelto G13 pricing document.

3.9.3 Level 3 – Gold S_v

Provides all Level 1 support and will be responded to within 8 hours or less - during UK working hours 9am to 5:30pm Monday to Friday, excluding UK bank holidays. Maintenance of VCS_L such as user/pack management, data and view templates are provided and will include up to 0.5 day per month. Level 3 support is provided as an additional cost. Refer to the Roelto G13 pricing document

3.9.4 SharpCloud Service Level

SharpCloud Public Cloud Multi-tenant instance service is available on Microsoft Azure offering 99.95% availability. P1 incidents raised with SharpCloud support will receive a response within 2hrs during UK working hours 9am-5.30pm Monday-Friday.

More details regarding maintenance and support can be provided upon request.

3.10 Outage and Maintenance Management

R-VCS_L is delivered using SharpCloud a Software as a Service, which is delivered via Microsoft Azure. Please refer to Microsoft Azure Service and SharpCloud terms and conditions for outage and maintenance management

3.11 Financial Recompense Model for not Meeting Service Levels

Service credits are not provided.

4. Provision of the service

4.1 Customer Responsibilities

The customer shall be responsible for:

- All data that is uploaded and used within a VCS_L and the SharpCloud service.
- Ensuring all users are adequately trained.
- Providing a secure and adequate Internet access to the service

Refer to Roelto and SharpCloud Terms and Conditions of Use.

4.2 Technical Requirements and Client-Side Requirements

VCS_L is powered by SharpCloud which is a Software-as-a-Service. The service is deployed via the cloud either as a public or private cloud and is accessed via a web browser interface.

Access to a suitable network connection to the internet via a compatible web browser is required. The following browsers are supported:

- Internet Explorer 11
- Microsoft Edge
- Firefox
- Chrome
- Safari 9+

There is no application to install and can be used on a PC/laptop, tablet or mobile device. The mobile version is a fully functioning replica of the desktop site when in landscape mode and provides a reduced interface with less visual functionality when in portrait mode.

Included with the SharpCloud subscription is a desktop version of SharpCloud and Query Connect, which can be both downloaded. The SharpCloud QueryConnect Tool is a simple desktop application that allows you to populate or update a SharpCloud story (R-VCS_L) directly from an external data base, that can also produce a batch file that can be scheduled to keep your data synchronised.

4.3 Outcomes/Deliverables

During the initial Gap Analysis, a Performance Management Framework will be co-created which will clearly identify the agreed Outcomes of each VCS_L service. Where appropriate a Key Performance Indicator will be identified against each outcome.

Deliverables will include:

- VCS_L solution of pre-configured SharpCloud Stories
- Documentation for:
 - Configuration – data attributes, calculations, relationships, views and enterprise configuration
 - Operation – how to use and maintain
- A fixed number of days per VCS_L to provide onboarding, training and support. The number of days varies per VCS_L.

4.4 Development life cycle of the solution

All VCS_L are delivered, starting with pre-configured SharpCloud Stories. Typically, there will be some parameterisation and changes based on specific user requirements and data attributes. The final configuration of your VCS_L application will be completed using R-SCDM (Roelto – SharpCloud Deployment Methodology) an agile methodology (SCRUM). In some instances, a blank SharpCloud Story may be used. The following stages are completed:

1. Project Set-up - establish ecosystem, project organisation and complete a Gap Analysis against a VCS_L (data, calculations, processes and dashboards/views) and user/business requirements.
2. Business Process Analysis – identify the changes and the benefits by completing the “As Is” and “To Be” for each business process the VCS will support/replace.
3. Develop a Benefits Dependency Network – this is a Performance Management Framework which includes agreed Outcomes based on step 2 above.
4. Review and update data model (based on Gap Analysis and Business Process Analysis)
5. Parametrise and update configuration of VCS_L to create a Minimal Viable Product (MVP) and test
6. Training and Support

Further details can be provided on request.

4.5 After-sales Account Management

Regular after sales meetings (typically quarterly) either online or face to face are held to discuss updates, functionality, logged issues and VCS_L and SharpCloud

roadmap. Where appropriate and agreed, a joint collaborative business Relationship Management Plan (RMP) can be co-created based on the ISO 44001 collaborative business relationship, a framework specification.

Further details can be provided on request.

4.6 Termination Process

Termination of support services will be initiated in writing with a minimum of 60 days' notice. Any costs incurred for early decommissioning of services as per the exit strategy and off boarding process, shall be submitted, mutually agreed, and paid by the user.

All R-VCS_L and SharpCloud services are provided on a min 12-month subscription. If the service is to be terminated the service will be switched off as requested, data saved, R-VCS_L and or SharpCloud Stories zipped and there will be no credit for days not used. Refer to SharpCloud terms and conditions for further details regarding the subscription and termination of the SharpCloud service.

5. Our experience

The following case studies show how Roelto's experience in providing visual collaboration solutions that include SharpCloud and other technologies, covers a diverse selection of industry sectors and includes a wide range of solutions from single workshops to enterprise solutions for large organisations. As a SharpCloud Business Partner, Roelto has been involved in the development and delivery of visual collaboration solutions, using SharpCloud since 2009 and during that time has configured and delivered hundreds of Visual Collaboration Solutions.

5.1 Case Studies

5.1.1 UK Trade and Investment – Life Sciences

VCS WaaS: Workshop-as-a-Service

A workshop was completed to identify a more collaborative and sustainable way of working across Government departments, Value Chain Partners and with potential FDI opportunities, globally. The workshop used Workshop-as-a-Service, powered by SharpCloud to capture ideas, information, activities to complete and alignment with UKT&I Life Sciences strategy, using SWOT, PESTLE, Stakeholder Management and Strategy Roadmap templates to develop an overall Strategy Map. Figure 18 shows an example of a Stakeholder template view – Stakeholder support versus Influence (high, medium, or low).



Figure 18: Stakeholder Workshop - support versus influence

5.1.2 Docklands Light Railway (DLR) part of Transport for London (TfL)

VCS_L R-PPM and R-CaaS: Project Portfolio Management and Collaboration-as-a-Service (ISO 44001 (BS 11000))

The Docklands Light Railway (DLR) is an automated light metro system opened in 1987 to serve the redeveloped Docklands area of East London, England. DLR has an ongoing programme of capital projects and extensions to the network. This programme of work is managed by DLR project management and supported by supply chain partners in collaboration with DLR operator Keolis Amey Docklands.

During each period (13 periods in a year), 1 to 2 days were spent with 10 to 20 people reviewing over 160 projects that were captured on Excel template reports (PGR). Each report had over 200 data attributes, which had to be completed manually, printed out and reviewed separately. Using R-PPM a standard data project template was created and used by each project. Data from the risk management reports, over 2300 milestones from Primavera (P6) and project details from the PGR was automatically uploaded into each project and “rolled up” to the portfolio. As a result, projects were reviewed by exception only providing real time status of projects, uncovering insights and saved over 212 days per annum by eliminating non added value administration activities and another estimated 299 days on indirect activities.

In addition, Collaboration-as-a-Service templates (BS 11000 Gap Analysis and Relationship Management Plan) was used to gain BS 11000 accreditation in collaboration with Keolis Amey Docklands. Below (Figure 19) is the DLR Portfolio Home page to navigate to the various parts of the DLR Project Portfolio.

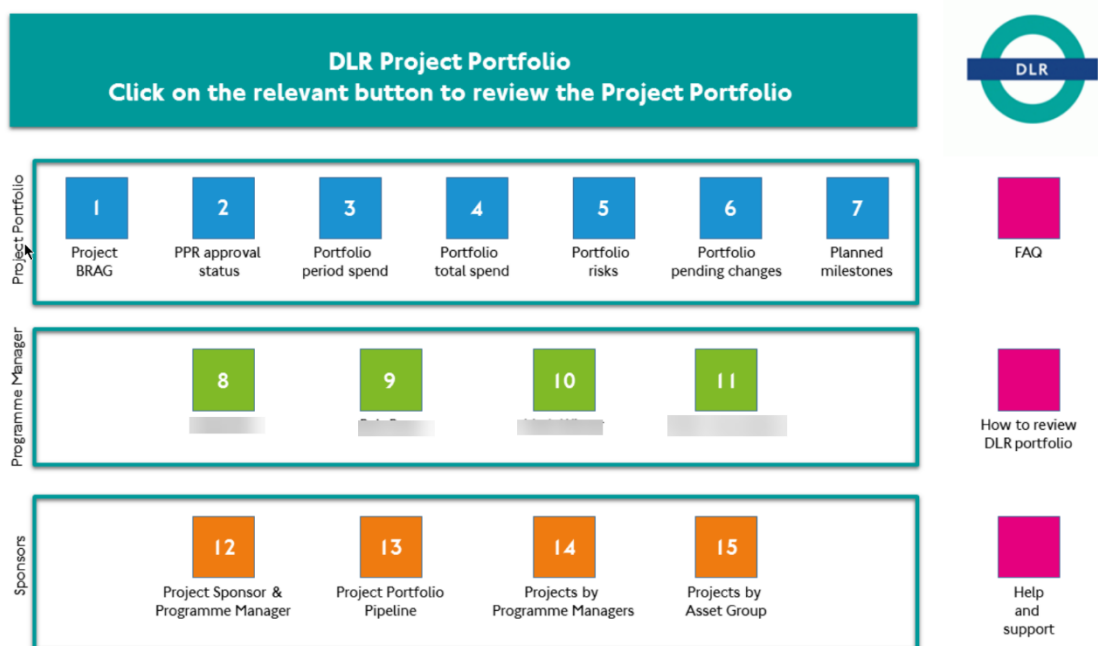


Figure 19: DLR Project Portfolio Homepage

5.1.3 House of Commons

VCS R-PPM: Enterprise Project Portfolio Management

Within the House of Commons there are several teams that support the running of House Services, including delivery of IT and capital projects by PDS (Parliamentary Digital Services) and SE (Strategic Estates) respectively. In addition, there are significant change programmes with regards to the Restoration and Renewal (R&R) and Cultural Transformation programme, including Business as Usual activities. This totalled to over 500 projects. This posed various challenges for House Service teams and the Commons Executive Board (CEB), such as being able to see all of these projects, their status and change impact against agreed outcomes, and the four HoC strategic objectives in near to real time.

A proof of concept was completed using R-PPM. Initially, a data template was put in place and consolidated and standardised data attributes across the HoC such as the Inclusive Lifecycle Milestones, RAG statuses, Finances, Risks, Benefits, Resources, Issues, Dependencies and Changes, meaning all projects now used the same data. A Project View template inherited the data attributes allowing the users to visualise the data captured in the manual spreadsheet Project Summary Report, into relevant views such as timeline, grids, tables, etc. A Project Sample template was created so that all projects used the same data and views. Project Programmes and individual Portfolios were created and visualised as an Enterprise Programme Management portfolio. Other projects and activities were included, such as the HS Corporate Business Plan, HoC Strategy and Cultural Transformation programme, combined with EPMO, to deliver an overall HoC dashboard for the CEB.

This provided visibility, status and context as all projects were in one place, including project relationships and their impact with regards to other projects, outcomes and

the 4 HoC strategic objectives. Figure 20 shows one of the PoC **examples** of the HoC Change Initiative and Programme Dashboard.

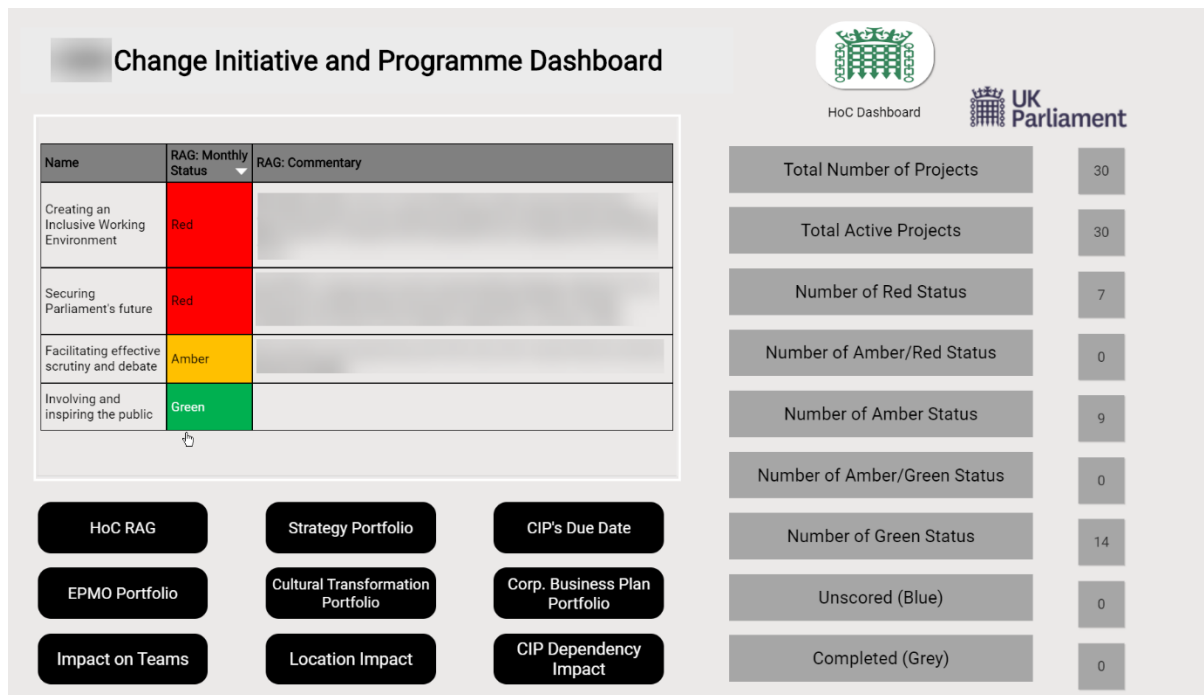


Figure 20: Example of a HoC CI&P Dashboard

5.1.4 Enterprise Ireland

VCS R-CaP and R-SRM: Communication & Presentation; Strategy Roadmap

Enterprise Ireland is the government organisation responsible for the development and growth of Irish enterprises in world markets. The key to supporting the growth and development of Irish businesses is being able to communicate the unique value propositions of each organisation to a global market.

Typically, Irish company capabilities are captured on a document that are stored in multiple places, are difficult to maintain and keep up to date. Furthermore, when communicating and presenting the Irish company profiles to potential clients, the information was very static, linear in communication and did not enable different digital content to be easily shared, presented and communicated. Follow up was also very challenging and did not enable collaborative interaction.

Using R-CaP a pilot was completed based on Irish businesses in the Sustainability sector. Each organisation included the standard text and other digital content such as images, videos and links to other content such as websites. Specific presentations were created which were automatically updated when content was changed centrally and shared across the business so that everyone could use the most up to date version.

Separate projects were completed for Strategic Roadmapping for the Construction and Life Sciences industry.

“A genuine pleasure to work with Jason over the past 12 months. Jason is a first-class communicator and that rare breed of person that successfully combines a wide-ranging strategic viewpoint with meticulous attention to detail. We would position Roelto as key partners in the integration and enhancement of our global communications platform within the Industrial Team at Enterprise Ireland” John Hunt, Senior Market Advisor

5.1.5 Transport System Catapult

Technology Strategy | 2016

The Transport System Catapult focuses on leading the debate with people and organisations who share an interest in Intelligent Mobility (IM). Key to facilitating collaboration and the exchange of ideas with all stakeholders was an online repository, developed using SharpCloud.

The design of the online repository involved a consistent TSC branding and multiple stories linked together to provide an overall narrative, focussing on IM Goals, the Global IM Market, IM Challenges and Roadmaps, UK Capabilities, Strategic Implementation and Further Reading, with each one containing further links to more detailed and specific information. This resulted in people being able to understand the IM market, identify opportunities and collaborate.

To view the TSC Technology Strategy for Intelligent Mobility please click [here](#)

5.1.6 ActionAid

R-WaaS and R-DBR

ActionAid is an international charity and global movement of people fighting for women's rights, social justice, and an end to poverty. ActionAid works with multiple organisations and partners to raise funds and deliver programs in 46 countries. ActionAid and Roelto have had a collaborative working relationship since 2012 which has included multiple programmes and projects. Using R-WaaS, multiple workshops have been completed, including SWOTs. Figure 21 is a view of an IT SWOT workshop illustrating how to use the identified Strengths (blue) to take advantage of the Opportunities (red) to identify Tasks (green) that you will include in your IT/Technology Roadmap (R-TRM). The relationships between the Strengths, Opportunities and Tasks are shown and include comments about the relationship (not shown).



Figure 22: Project Roadmap with RAG status and milestones

5.2 Clients

Below are a selection of clients:



HOUSE OF COMMONS





Lilly logo



5.3 Contact Details

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