

G-Cloud 13 Service Definition – Edit Consultancy & Support Services



Crown
Commercial
Service
Supplier



ISO 27001
INFORMATION SECURITY
MANAGEMENT



Classification:

Public

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Service Overview

The Power Platform and Dynamics 365 constitute a vital component of Microsoft's comprehensive cloud services suite, featuring seamless integration with the broader Microsoft cloud ecosystem. Edit engages in close collaboration with its clients to craft, construct, and maintain comprehensive systems for businesses seeking to enhance operational efficiency through Microsoft Cloud services. With a wealth of technical and functional expertise, Edit specialises in delivering cloud-based solutions across various sectors, including the UK Public Sector. Typically, Edit's offerings encompass:

- Solution Architecture
- Project Management
- Technical Assurance
- Digital Cloud Service Design
- Microsoft Cloud Architecture Advisory Service
- Data Modelling
- Cloud Migration Consultancy
- System Implementation, Review & Recommendations
- Software Development
- Quality Assurance/ Test Strategy
- Training and User Adoption
- Service Desk - Technical Support
- Consultative services across all of the above

Why Edit?

Edit 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 Customer Insight, as well as a number of complementary third party solutions from the Microsoft Partner ecosystem.

Edit 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 B2B, B2C, Non-profit customers:

- Air Ambulance Kent Surrey Sussex
- The British Heart Foundation
- The Salvation Army
- Dogs Trust
- Concern Worldwide
- John Lewis FS
- Jaguar LandRover
- The Southern Co-op
- MDRT
- Virgin Active
- Tesco Bank

Edit is a Microsoft Gold Partner and has been delivering Dynamics projects since the launch of Dynamics. Edit's Microsoft services are comprised of the following offerings:

- Microsoft Dynamics 365 Consultancy
- Microsoft Dynamics Sales & Customer Engagement (CRM) Upgrade Consultancy
- Microsoft Dynamics Customer Insights Consultancy
- Microsoft Power Platform Consultancy
- Microsoft Power Apps Consultancy
- Microsoft Power Apps Portals Consultancy
- Microsoft Power Automate Consultancy
- Microsoft Power BI Consultancy
- Microsoft Azure Consultancy

Our Qualifications

Our team of Azure Associate Data Engineers, have experience of delivering customer data focused solutions. The team use a range of Azure services, follow Microsoft best practice architectures, and have the benefit of decades of specialist knowledge with Customer Data Platforms.

The team hold certifications DP-900, DP-203, MB-260, AZ-104 and PL-900 which contribute to our Microsoft Gold Partner status in Data Analytics and Data Platform.



How we work

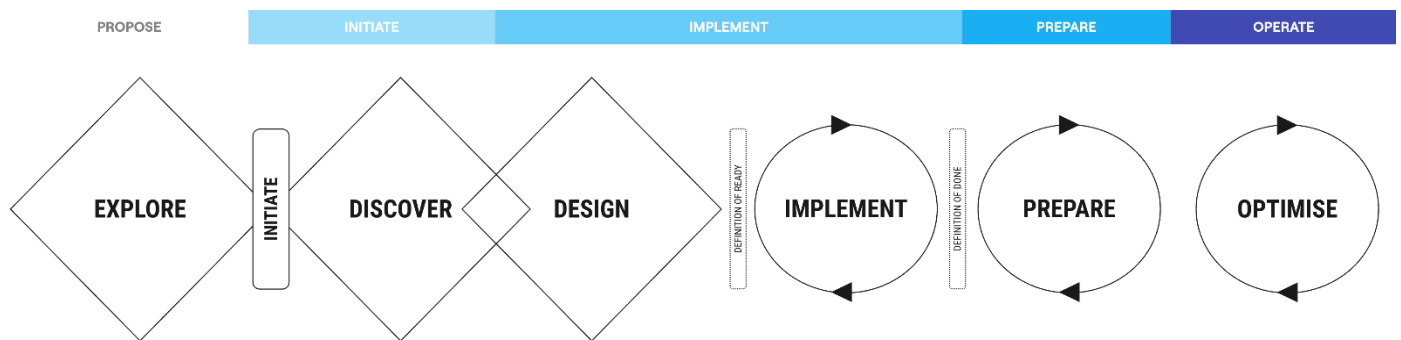
Engineering work in synergy with the Cloud Solutions team to ensure the proposed solutions are built to provide resilience and availability in line with enterprise grade security, both cost effective (the most appropriate type and configuration of resource is used) and secure (consideration of resource, account, and network config etc.). This will also consider scalability of the deployed resources to optimise performance against cost, an example of this may be to use Synapse Serverless SQL pools for ad-hoc analysis of data residing in a data lake rather than loading to a dedicated SQL pool.

Our Microsoft certified cloud solutions team will ensure a well architected solution is monitored using specific key performance indicators and with alerting that can be configured as required. Using Graph API the solution state can be queried by external 3rd party monitoring platforms or from an Azure Monitor environment.

Our Approach

Many of the organisations that Edit has delivered digital services for, have complex business processes that are unique to their organisation. For this reason, Edit has developed a flexible agile delivery methodology (which is based on Scrum and shares the core principles of Microsoft's "Success by Design" 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 to a dedicated Edit Delivery Manager. Our Delivery 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 Delivery Managers and Edit 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 Edit 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:

- We understand the problem during **Explore**, propose an approach and begin planning for Delivery.
- Then build a collaborative and efficient working environment during **Initiate**.
- Generate a deep understanding of the problem domain during **Discover** and build upon the hypotheses we outlined in Explore.
- **Design** is where we extend upon the understanding gathered during Discover and design solutions that are validated as valuable, feasible, viable and useable.
- We take the designed solutions and refine these into work items that the teams can then **Implement**.
- During **Prepare** we plan for, and deploy, the solution(s).
- Once releases we then monitor and maintain the performance of the solution and look to **Optimise** where possible.
- We confirm that the outcomes we aimed to deliver are being met and then feed the Orbit cycle again with these further learnings.

This is not a linear process. The model allows us to deliver iterations of incremental gains and there are many opportunities for testing, learning and changing throughout the process.

Edit uses Office 365 (Teams, Word, Excel, Project, PowerPoint etc.), internally to manage communication and progress, as well as Azure DevOps for task management, development pipeline and release management.

Governance

The nature of our projects 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. Edit will commit a dedicated team to the Discovery and Implementation, including a dedicated Delivery Manager and several consultants, as required. Key themes in Edit's experience of delivering successful projects include:

- Executive buy-in and sponsorship: Clear endorsement and participation from a member of your Senior Management team. This will be mirrored by executive sponsorship within Edit 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 your 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 Edit and our customers.

Discovery & Design

During the Discovery and Design stage, Edit 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 Edit Delivery Manager, the Edit 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 Edit 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

Project Kick-off; during the initial days of the implementation, the Edit Delivery 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 Edit)
- 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. Edit strives to be flexible and agile, as, in our experience, the most important aspect is to find the best fit for each project.

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.

Quality Assurance; once Edit 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:

- It satisfies the business requirements that are defined in the functional specification
- It is fit for purpose for running the end-to-end business processes
- Any data which has been migrated from legacy business solutions has been imported correctly
- 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 Edit. 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 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 Edit Helpdesk.

Edit Helpdesk Support

Edit 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 Edit will liaise on your behalf.

Support Hours and Access

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

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

Edit is accredited to the ISO 27001 quality management standard.