



**cds**

# **Appian Case Management Implementation**

**G-Cloud 14**

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## Introducing CDS

CDS is a technology consultancy delivering outcomes that matter for organisations operating critical infrastructure. We specialise in software development, process improvement and cyber security, partnering with customers to modernise quickly and safely.

As independent, technology-agnostic problem solvers, we enable businesses to transform at pace while reducing risk, improving productivity, and maintaining the resilience that mission-critical operations demand.

Our approach empowers teams and delivers secure, user-centred solutions that meet statutory, regulatory and operational obligations with confidence.

## Service Overview

Our Appian practice provides expert end-to-end case management services, from discovery through to live service and ongoing support. Our teams combine deep technical capability with extensive public sector delivery experience across complex case management solutions, business process transformation, process automation, data migration and integration, and tiered managed support.

Our highly skilled consultants are onshore, UK-based, and security cleared, providing you with trusted expertise, close collaboration, and the ability to mobilise quickly.

We begin all engagement begins with a structured discovery phase that puts your users at the centre and aligning to frameworks including GDS Service Standard (GDS) and Digital Scotland Service Standard (DSSS). This includes auditing existing services, engaging with stakeholders, and mapping processes to build a clear picture of where you are and where you need to be. From there, our user researchers, service designers and Appian Certified Consultants work together in cross-functional teams to co-design solutions with users, taking a user-centred evidence-based approach rather than relying on assumptions.

We follow an agile approach, delivering software iteratively. You see working software early and often. Each sprint brings tested, production-ready functionality that supports continuous assessment against GDS and DSSS criteria and moves you closer to your end goal.

## Features and Benefits

### Features

- Expert end-to-end Appian case management delivery. CDS supports you from discovery through to live service and ongoing support.
  - Agile, sprint-based delivery with working software released every two weeks.
  - Structured, user-centred discovery and design, including user research, service design, and prototyping.
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- Low-code configuration on Appian, covering user interfaces, workflows, business rules, and integrations.
- Process automation and agentic AI, including Robotic Process Automation (RPA), intelligent document processing, and predictive case routing.
- Accessibility design and testing to Web Content Accessibility Guidelines (WCAG) 2.2 AA standards, built in from the start
- Onshore, UK-based, security-cleared consultants available to mobilise quickly.
- Flexible, tiered managed support with iterative enhancements shaped by real user feedback after go-live.

### Benefits

- You see working, tested software early and can shape what comes next, reducing delivery risk throughout.
- Solutions are built around your users' needs, improving adoption and reducing the risk of costly rework.  
You can adapt quickly to changes in legislation, policy, or priorities without expensive redevelopment.
- Your service is inclusive and accessible, reaching the widest possible audience and meeting your legal obligations.
- Your service keeps improving after go-live, with enhancements driven by real user / operational feedback.
- You benefit from a partner with a proven track record delivering national-critical case management services in the public sector.

## Proven Track Record

As an Appian partner, we have deep expertise in designing and delivering secure, scalable digital-first case management solutions for public sector and statutory organisations delivering national-critical services at scale.

Across these programmes, we have consistently delivered improved operational outcomes, increased efficiency, modernised service delivery and measurable cost savings, helping organisations transition from legacy, manual processes to more streamlined and user-centred digital services.

Our Appian case management implementations in the public sector include:

- Mental Welfare Commission for Scotland - information and case management system.
- Independent Office for Police Conduct (IOPC) - investigative case management system.
- Social Work England - regulatory case management system supporting 76,000 social workers.

- West Mercia Police – digital forensics case management system.

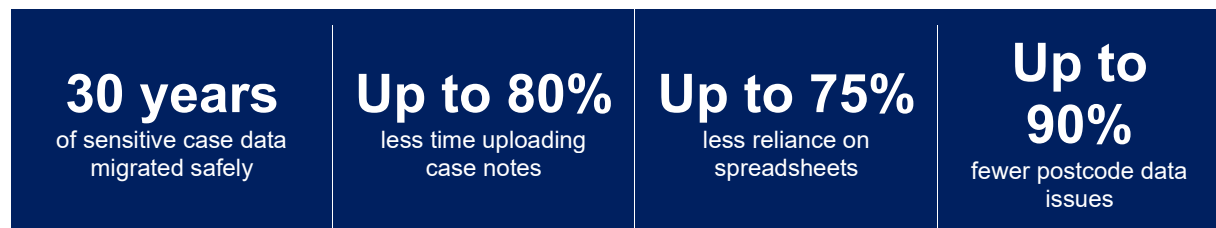
Through our extensive delivery experience, we have developed strong expertise in operating within highly governed and regulated environments, where rigorous compliance, assurance, accountability, security and stakeholder scrutiny are critical to success.

## Case Study

### Protecting Scotland’s Most Vulnerable People: Modernising Case Management at the Mental Welfare Commission for Scotland

The Mental Welfare Commission (MWC) for Scotland is an independent statutory body funded by the Scottish Government. Its mission is to protect and promote the rights of some of Scotland’s most vulnerable people including those living with mental illness, dementia and learning disabilities.

The Commission’s team includes doctors, mental health nurses, social workers and caseworkers. They review cases to ensure individuals are treated with dignity, that correct legal and clinical processes are followed and that no safeguarding risks are missed.



## The Challenge: An Ageing System Putting People at Risk

The Commission relied on an ageing CMS called the Information Management System (IMS). The original developers no longer wanted to maintain it including applying security patches. That meant the system was not only outdated but posed a growing security and data protection risk.

The Commission required a modern replacement capable of handling highly sensitive case data, complex workflows, and regulatory reporting, while also supporting a 30-year data retention policy and delivery in line with the Digital Scotland Service Standard.

Crucially, the legacy system had to be successfully decommissioned by the end of March, creating a fixed delivery deadline with little room for delay.

The operational challenges were specific and pervasive:

- Every form had to be printed, scanned and processed with the system frequently failing to read handwritten clinical notes.
- Case notes, emails and attachments were uploaded manually, one by one.
- Pending actions were chased by phone and email, with no automated notifications.
- Reports were hand-built in PowerPoint from raw data exports – slow, error-prone and resource-intensive.
- There was no workflow automation, no task routing and no system-driven escalations.

Operating on an unsupported, unpatched legacy system was not a manageable position for an organisation responsible for protecting Scotland's most vulnerable people. Any breach or failure would have had direct consequences for real individuals whose safety depended on the integrity of that data.

The data challenges were equally complex. The Commission operates a 30-year data retention policy across every email, call log and case record. Data quality in IMS was poor with years of patches, manual inputs and fragmented processes had left records inconsistent, duplicated and poorly structured. Before any advanced capability could be introduced, the Commission needed confidence that its data foundations were accurate and trustworthy.

## Our Solution

CDS recommended Appian's low-code case management platform as the foundation for the new system. The platform offered the best of both worlds: the speed, reliability and ease of a commercial off-the-shelf (COTS) solution, combined with the flexibility and agility to align completely with the Commission's unique workflows and regulatory requirements.

### Why Appian?

- **Comprehensive capability:** case management, forms, workflows, regulatory reporting and records management without bespoke development.
- **Low-code architecture:** accessible enough for an in-house developer to maintain, reducing long-term dependency on external partners.
- **Future AI readiness:** Appian's AI roadmap includes intelligent document reading, data cleansing and chatbot capabilities aligned with the Commission's future ambitions.
- **SaaS model:** removes the need to manage infrastructure, improving scalability and reducing operational overhead.
- **Security:** a modern, secure environment appropriate for highly sensitive personal data.

We delivered the Mental Welfare Commission for Scotland's replacement case management platform in alignment with DSSS, supporting the delivery of a secure,

accessible and user centred public service shaped around operational and user needs.

Throughout delivery, we worked with both the Mental Welfare Commission governance structure and the Scottish Government Digital Assurance Office (DAO). This included formal assurance activity ahead of MVP go live, evidence submissions and regular governance reporting to demonstrate progress, quality and delivery readiness.

The draft/prelim report concludes with an amber/green status and proceed to the next stage

“This is an outstanding achievement for both of our organisations and I would like to thank you and your teams for their commitment to our project. There are many positives highlighted by the assurers, including the relationship between CDS and the Commission.”

Suzanne McGuinness, Executive Director (Social Work),

## The Outcome: Secure, Efficient and Built to Last

The project successfully reached go-live in March 2026, ahead of the legacy platform end of life, with the system now fully operational and in daily use by Commission staff.

The transition was notably seamless; users were able to log in and continue their work without disruption. This lack of friction is a strong indicator of success, reflecting effective delivery, strong user readiness, and high levels of adoption.

<p><b>Expected operational efficiency</b> Up to 80% less time uploading case notes and managing email attachments. Up to 50% less time managing case pendings.</p>	<p><b>Expected data quality and security</b> Up to 90% fewer issues caused by postcode data problems. All data migrated to a modern, secure, access-controlled environment.</p>
<p><b>Expected reduced reliance on spreadsheets</b> Up to 75% less reliance on manual spreadsheet working across the organisation.</p>	<p><b>Future-ready platform</b> Clean data foundations ready for future AI capabilities, including intelligent document reading and automated form validation.</p>
<p><b>Automated data extraction</b> Mapped 100 document templates to allow automated data extraction</p>	<p><b>Met Digital Scotland Service Standard</b> Secure, user-centric, and accessible public service.</p>

The Commission now has a modern, secure, scalable case management platform that will support its work for years to come.

Following go live, the project moved into a three-month enhancement phase shaped by real user feedback and day to day usage.

Feedback was triaged into defined workstreams, enabling the team to prioritise meaningful enhancements, address operational pain points and continuously improve the service through iterative delivery.

'My experience of CDS Ltd is of a committed supplier with strong social values as well as the technical ability to deliver a complex case management IT system, which is wholly transformative for our organisation.

Their customer relations and client responsiveness is excellent. CDS conveys a sense of true partnership working, with professionalism and assurance.'

Suzanne McGuinness, Executive Director (Social Work).

## Technical Capabilities

CDS brings proven technical capability across the full Appian delivery lifecycle, from discovery and design through to build, integration, migration, testing, training, and ongoing support.

You benefit from expert, onshore security cleared UK-based consultants combine deep technical expertise with extensive public sector delivery experience, enabling us to deliver secure, user-centred solutions that perform effectively in complex, national-critical environments.

We adopt a flexible hybrid approach, working on-site during the design phase and at key stages of development to enable close collaboration and engagement with your teams. This ensures faster decision-making, stronger alignment to your requirements, and better knowledge transfer.

We are experienced at delivering at pace, using parallel design and build workstreams to accelerate delivery without compromising quality.

## Discovery and Design

CDS' highly skilled user-centred design team, comprising user researchers, service designers, content designers, interaction designers, user interface designers and accessibility consultants, work together in cross-functional teams. This means you benefit from integrated thinking, faster iteration and better outcomes.

### Discovery

We begin every engagement with a structured discovery phase that puts your users at the centre. We audit existing services, interview stakeholders, and research user needs to understand what is working and what is not. This gives us a clear picture of your 'as-is' processes, technology landscape, and the challenges your teams face day to day.

Where previous discovery or research has been undertaken, we validate and build upon those outputs, adding value through an independent external perspective to challenge assumptions, test decisions. This ensures recommendations remain aligned to user needs, strategic objectives, and best practice, while avoiding duplication.

From this, we build the evidence base you need to move forward with confidence. We create lightweight personas, map user journeys, and develop user stories that reflect real needs. We identify how pain points can be resolved and define the minimum set of requirements needed to deliver a viable a Minimum Viable Product (MVP).

This approach establishes a strong foundation for Alpha and beyond, reducing delivery risk, improving alignment, and accelerating value.

### User Research

We put real user behaviour at the heart of every project. Rather than relying on opinion or business needs, we gather evidence of how people behave and the tasks they need to complete. Our research sessions begin with natural tasks rooted in each participant's own experience. This gives you the clearest, most reliable picture of what your users need.

We use a broad range of qualitative and quantitative methods to understand what users do, say, think, and feel including one-to-one interviews to explore user goals, behaviours and pain points, as well as user journey mapping workshops.

### Service Design

We put users at the heart of everything we design. Our user-centred design approach is evidence-based, iterative, and inclusive, ensuring every solution we build meets both strategic goals and user needs.

We involve users throughout the entire process, from stakeholder interviews and focus groups through to usability testing and design iteration. We map user journeys and develop 'as is' service maps to understand behaviours, pain points, motivations, and accessibility needs, ensuring services are designed around how people work and interact with the system. From this, we create 'to be' service blueprints that define the future user experience and operational processes, which are then tested and refined with users to validate assumptions, improve usability.

This approach helps ensure services are not only usable and accessible, but also achieve high levels of adoption, improved user satisfaction, and stronger operational outcomes.

### Content and Interactive Design

The right words, presented in the right place and in the right order, can make the difference between a user successfully completing a workflow or task. Our approach to content and interaction design focuses on creating services that are clear, intuitive, and easy to use.

We write in plain English, applying GDS and DSSS content design principles alongside GOV.UK style guidance to ensure consistency, clarity, and accessibility throughout. Content is tested with real users to confirm it is understandable, findable, and actionable, while information is structured around how users naturally think and behave rather than internal organisational structures. We also work with real content from the earliest stages of prototyping, avoiding placeholder text so that user feedback is grounded in realistic experiences from the outset.

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Inclusivity is embedded throughout our design process. We create accessible and inclusive content and interactions that support users regardless of ability, language, age, or location, ensuring nobody is excluded or left behind.

### Prototyping

Using the outputs from user research, our interactive designers focus on simplifying processes and breaking them down into manageable steps for the users, whilst minimising friction.

We adopt a collaborative, co-design approach, developing prototypes and wireframes directly within the Appian environment to gather feedback from stakeholders and real users early and often. This iterative process enables us to validate design decisions, refine the user journey based on real-world user insight, and continuously improve the overall user experience.

### Accessibility

CDS is an expert in accessibility with a long track record in the design, development and testing of inclusive and accessible solutions for customers who need to reach and engage with wide and diverse audiences. You benefit from accessibility that is based in from the start and at every stage of our user experience design and development process. This ensures the applications and solutions we deliver are accessible to as many people as possible and meet equality and accessibility requirements.

### Proven Experience

For Yorkshire Water, we helped transform digital engagement for 2.3 million customers in response to Ofwat's AMP7 regulations. Their primary customer service channel was telephone, which was inefficient, costly and unable to consistently meet customer needs. We took an ecosystem approach, conducting in-depth user research to map the most complex and common journeys, including paying a bill, moving home and reporting a leak. Using ideation sessions, we created 'to-be' service blueprints and tested them frequently with users.

#### Results

Since launch, the platform has delivered a 20% reduction in inbound calls to the contact centre, creating improved efficiency and customer experience and significantly reducing operational costs.

## Build

Our build approach is structured to give you working software quickly, reduce delivery risk, and keep you in control throughout.

We operate in a tri-party delivery model alongside Appian's Customer Success Team, giving you access to deep technical expertise, independent validation of design decisions, and accelerate issue resolution. This collaboration enhances delivery quality and reduces risk.

We work from a prioritised backlog and deliver incrementally through a series of short product delivery sprints (iterations), each of which will span two weeks in length

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and results in a small piece of working product. Development, testing, QA and User Acceptance Testing (UAT) run in parallel throughout, so quality is built in from the start.

We use a two-stage build model:

- **Foundation build** - we deliver a Minimum Viable Product (MVP) comprising the core set of requirements. This gets working software into your hands early and allows real user feedback to shape what comes next.
- **Enhancement build** - we build on the MVP through a programme of iterative releases, adding bespoke configuration sprint by sprint until the full solution is complete.

This approach means you realise value early and continuously throughout delivery. Rather than waiting months for a single, high-risk release, each sprint delivers tested, working software that provides immediate progress, enables rapid feedback, and incrementally moves you closer to your end goal.

### Configuration

We build solutions using Appian's low-code platform that offer extensive flexibility without the risks of traditional bespoke development. Every component including user interfaces, workflows, business rules, integrations, and data structures is configured visually using industry-leading design tools. This ensures that you can adapt quickly to changes in legislation, policy or organisational priorities, avoiding the need for costly system replacement or extensive redevelopment.

This approach means:

- Faster delivery of working software.
- Greater flexibility to adapt as your needs evolve.
- Backwards compatibility, so future upgrades are smooth and risk-free.
- No dependency on custom code that can block platform updates.

Where platform extension is needed, we use supported Software Development Kits (SDKs) to add new components and connectors. This keeps solutions maintainable and future-proof.

### Process Automation and Agentic AI

Our Appian solutions incorporate Robotic Process Automation (RPA) and Agentic Artificial Intelligence (AI) to reduce manual effort and processing time.

RPA handles repetitive, data-intensive tasks with embedded AI for:

- Intelligent document processing.
- Automatically triage incoming cases.
- Predictive routing of work.
- Natural language processing.

Together, these technologies enable the automation of routine and repetitive tasks, reducing manual processing, improving operational efficiency and processing times

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and allowing caseworkers to focus on higher-value activities that require judgement and expertise.

### Data Migration

We take a phased, low-risk approach to data migration. Our Data Consultant is embedded in the sprint team from day one, enabling migration to run as a parallel workstream.

Our migration process includes:

- Data profiling to understand what you have and where it lives.
- Quality checks and secure extraction.
- Data cleansing and mapping.
- Multiple test migrations before final cut-over.
- Business user validation before go-live.

Where full migration is not needed, we use Appian's data fabric to integrate data from multiple sources into a single, unified view. This reduces risk and cost associated with migration, eliminates the risk of duplicate data entry, and ensures access to accurate, up-to-date information.

### Integration

Appian solutions connect securely with existing systems, databases, and application programming interfaces (APIs), enabling you to leverage your current technology investments without disruption. Our configuration-driven approach avoids bespoke coding and reduces ongoing maintenance cost and risk.

Integration work begins during discovery. We map your existing data flows, review network topology, security boundaries, and key integration points before any configuration begins. The output is a fully documented integration blueprint that underpins delivery.

### Testing and Quality Assurance

Quality is built in from the start. We embed an International Software Testing Qualifications Board (ISTQB) qualified Test Lead in every sprint team, following a shift-left testing philosophy. This means we find and fix issues early, before they become costly problems.

Our testing approach is certified to ISO 9001 and includes:

- Automated and manual functional testing against agreed acceptance criteria.
- Performance testing under realistic load conditions.
- Security testing for all authentication and authorisation mechanisms.
- User Acceptance Testing (UAT) validates functionality against your requirements.
- Defect resolution within the current sprint wherever possible.

Any defects are logged, tracked, and resolved in a transparent and traceable way. Re-testing is coordinated by the Test Lead to confirm fixes meet expectations before release.

## Training

CDS recognises the vital role effective training plays in upskilling staff, supporting implementation, and driving successful user adoption.

Alongside continual 'on the job' knowledge transfer to upskill your teams, we provide formal, comprehensive training for system administrators and users before handover and go live. This is designed to support successful change management, ensure smooth implementation and embed solutions that become integral to day-to-day operations.

Our training also builds internal technical capability, empowering teams to become self-sufficient and reducing long-term reliance on external support and the overall cost of change.

In most cases, we adopt a 'train-the-trainer' model, delivered through a blend of on-site and remote sessions. This is supported by comprehensive training materials and easy-to-follow digital end-user guides, written for non-technical audiences and fully compliant with WCAG 2.2 accessibility guidelines.

### Proven Experience

When Mental Welfare Commission for Scotland introduced its new case-management system, CDS trained 70 people to ensure no one was left behind.

We designed tailored, face-to-face training sessions for each role across the organisation:

- Practitioners and caseworkers.
- System Administrators and super users.
- The Executive Team.

Over two weeks, we delivered 67 hours of training. Sessions were engaging, interactive, and designed so that every participant understood not just how to use the system, but why it mattered. We provided recordings and supporting materials so people could revisit what they had learned at their own pace.

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We did not just train people on the system. We bridged the gap between technology and new ways of working. Our approach supported effective change management and drove genuine user adoption across the whole Commission.

### Results

**95%** of attendees rated their training four or five out of five.

"You did a fantastic job of the training, thank you! Huge thanks... so good to see, and excited to get started."

Chief Executive, Mental Welfare Commission for Scotland

## Service Transition and Ongoing Support Levels

CDS follows ISO20000 aligned processes to ensure service readiness, and that release planning and change management processes are consistently applied.

Our service model is designed to provide comprehensive, proactive support operating to ISO20000:2018 Service Management and ITIL best practices, across the full-service management lifecycle.

You receive a fully managed service encompassing application support, platform maintenance, incident management, problem management, change management, supplier management, and out-of-hours support for major incidents. This ensures business-critical systems remain secure, resilient and high performing whilst while driving continuous service improvement and maximising long-term customer value

All members of the CDS Service Delivery team are ITIL-certified, UK-based, and hold CTC and SC clearance, providing assurance that support is delivered by trusted, appropriately qualified personnel.

### Proven at Scale

Business-critical systems supported by CDS include:

- **Mental Welfare Commission for Scotland** national case management system used by 70 full-time users, managing circa 40,000 patient forms, 35,000 active cases across 33,000 patients.
- **Independent Office for Police Conduct** case management system, used by 618 full-time users managing circa 800 live investigations.
- **National Police Chiefs' Council** - 'Single Online Home' digital policing platform used by 41 out of 43 police forces (available to 90+% of citizens in England and Wales) to report non-emergency crime, and supported 24/7/365
- **Cabinet Office, ResilienceDirect** – The UK's secure web platform for exercising, planning, and coordinating responses to major incidents and disasters supported 24x7 and used by 60,000+ emergency services personnel.

For Single Online Home we achieved 100% uptime over the last three years and continually exceed monthly SLA targets, averaging 95% attainment against a target of 80%.

## Managed Service

We offer three support levels of support (Bronze, Silver and Gold) each including:

- **Smooth service transition** from project to live service support. This will also include **Hypercare** delivering elevated service levels, helping to stabilise the solution, during the first three months of go-live to resolve issues quickly and ensure smooth transition into business-as-usual operations.
- **Second- and third-line support** delivered by ITIL certified support analysts and Appian developer resolver group for complex issue resolution.
- **24/7 online self-service portal** for raising and tracking incidents and service requests. Where possible we will leverage API integration with your ITSM system to eliminate manual rekeying and streamline workflows.
- **Dedicated telephone support** available from 08.00am – 18.00 Monday – Friday (excluding bank holidays), answered and managed by an experienced UK based service desk team.
- **Certified Service Management Teams** comprising ITIL certified Service Desk team and Technical Appian Resolver Team who manage and resolve all incidents and requests in line with the agreed SLA.
- **Named Service Delivery Manager & Account Manager** providing a single point of accountability and ensuring proactive service governance.
- **Robust change management** to maximise change success, while minimising service and operational risk.
- **Comprehensive reporting and reviews** comprising monthly performance reports detailing activity, SLA performance, service improvements, scheduled maintenance, backups, continuous improvements etc plus quarterly contract reviews led by Service Delivery Manager / Contact Manager.
- **Service review meetings** led by Service Delivery Manager which forms part of our continuous improvement plan and long-term value. Following Go-Live we meet on a weekly basis, for the first six weeks, to discuss and rectify issues as part of hypercare. Thereafter, we transition to quarterly review meetings in year 1, bi-annual review meetings in year 2 and annual review meetings in year 3 onwards.

**SLA Incident response**

<b>Service</b>	<b>Bronze</b>	<b>Silver</b>	<b>Gold</b>
<b>Incident response</b>			
P1 - To be called in	15 minutes	15 minutes	15 minutes
P2	1 hour	1 hour	1 hour
P3	1 hour	1 hour	1 hour
P4	4 hours	4 hours	1 hour
P5	1 working day	1 working day	1 hour
P6	1 working day	1 working day	1 hour
<b>Target incident resolution - core hours</b>			
P1	8 hours	6 hours	4 hours
P2	15 hours	11 hours	8 hours
P3	5 working days	3 working days	1 working day
P4	7 working days	5 working days	3 working days
P5	N/A	14 working days	10 working days
P6	N/A	N/A	N/A
Major Incident Report	N/A	10 working days	5 working days

## Ways of Working

At CDS we apply agile principles across our projects, primarily using the SCRUM Agile methodology. We operate multi-disciplinary squads that combine domain expertise with technical excellence, delivering value early and iteratively through two-week sprints. Our approach is underpinned by the following core practices:

- **Daily standups:** A team call for 15 minutes each morning to track progress, surface blockers and ensure sprint goals are achieved.
- **Sprint planning:** Held at the start of each sprint to prioritise the work, align on objectives and ensure the team is fully prepared.
- **Sprint review:** At the end of the sprint, the team demonstrate to all stakeholders the deliverables achieved and present the sprint goal for the next sprint.
- **Sprint retrospective:** For each sprint the team will review what went well, identify areas of improvement and embed lessons learned to drive continuous improvement.

Additionally, we have an Agile mindset and culture at CDS, in which we apply:

- **User-centred design and customer-focus:** Through collaboration and partnership working we deliver outcomes that meet user needs.
- **Adaptability and flexibility:** Short feedback loops enable us to respond quickly to change, with teams empowered to pivot as required.
- **Continuous learning:** Retrospectives encourage open, honest feedback to continually improve ways of working and delivery effectiveness.
- **Partnership and teamwork:** We create a one-team culture with you and your supplier partners, working collectively towards shared project goals.

# Account Management

## Management Structure

We operate a defined management structure with five levels of seniority, providing clear lines of accountability, governance, and decision-making throughout delivery.

This ensures the right level of expertise and oversight is applied at every stage of the engagement, enabling issues to be resolved quickly, risks to be managed effectively, and decisions to be made without unnecessary delay.

Level	Description
Senior Leadership	Accountability for organisation-wide strategy, outcomes and direction
Principal Consultant	Provides leadership and deep expertise with significant accountability
Lead Consultant	Experienced practitioners who are adaptable and flexible and lead complex projects with accountability.
Mid Consultant	Broad level covering skill practitioners across the majority of doing roles. Takes accountability for outcomes and empowers team members.
Associate	Entry level role, takes ownership of their own tasks

## Client Leadership Team

For each project we appoint a client leadership team comprising:

- Client Partner - Accountable for the commercial and delivery success and client satisfaction.
- Delivery Manager - Responsible for the successful delivery.
- Technical Manager - Responsible for technical delivery quality.

This provides clear ownership, strong governance, and direct access to senior decision-makers throughout delivery, ensuring effective communication, rapid escalation where required, and alignment to your strategic objectives.

## Values and Behaviours

Across the business, we adopt consistent behaviours aligned to our core values, bringing the same standards, professionalism, and collaborative approach to every project.

This provides customers with a consistent experience and confidence that delivery will be transparent, accountable, and focused on achieving the right outcomes.

Values	Behaviours
<b>Tenacity</b>	<ul style="list-style-type: none"> <li>• Practitioner Excellence</li> <li>• Proactivity and Drive</li> </ul>
<b>Togetherness</b>	<ul style="list-style-type: none"> <li>• People-first</li> <li>• Commercial/business Acumen</li> </ul>
<b>Integrity</b>	<ul style="list-style-type: none"> <li>• Integrity and Honesty</li> <li>• Open Communication</li> </ul>
<b>Curiosity</b>	<ul style="list-style-type: none"> <li>• Adadpability</li> <li>• Continuous Improvement</li> </ul>
<b>Challenging</b>	<ul style="list-style-type: none"> <li>• Leadership</li> <li>• Client obsessed</li> </ul>

## Governance

Delivery aligns with both client and public sector governance and assurance frameworks, including Government Digital Services (GDS) and Digital Scotland Service Standard (DSSS) and relevant architectural, security, and assurance standards.

We appoint a dedicated Client Leadership Team with overall responsibility and accountability for successful delivery, operating within a clear governance structure that supports effective decision-making, oversight, risk management, and escalation throughout the programme.

We develop the Risks, Assumptions, Issues and Dependencies (RAID) log together during mobilisation, creating shared ownership from the very start.

Alongside agile ceremonies, we hold monthly programme boards to discuss delivery progress, risks and dependencies, supported by quarterly reviews focused on relationship management, continuous improvement, and long-term roadmap alignment.

Any potential impact to scope, cost or timeline is raised early and managed together, so there are never any surprises.

When required, we combine Agile and PRINCE2 (Projects in Controlled Environments) principles to give you the best of both worlds with the pace and adaptability of agile delivery within a governance framework you can trust.

We work in the open. We share our agile project tools such as Jira or Azure DevOps so you have real-time visibility of the product backlog and delivery progress and invite your stakeholders to attend our agile ceremonies.

## Project Communication

Your Delivery Manager is your single point of accountability for project delivery. They lead delivery, co-ordinate communications across all stakeholders, and ensure key decisions are visible and acted on. Any potential impact to scope, cost or timeline is raised early and managed collaboratively.

From the start of the project, we agree a Communications Plan with you that defines who needs what information, when, and how. This ensures transparent communication, effective stakeholder engagement, and a collaborative “one team” focused on building long-term, trusted partnerships to deliver shared outcomes.

This approach has a proven track record over 70% of our core customers having been with us for over 10 years.

Your Project Manager will set up the following regular touchpoints:

- **Daily stand-ups** to discuss progress, remove blockers, and keep delivery moving.
- **Sprint reviews** (show-and-tells) so your teams can see working software and shape future priorities.
- **Weekly status reports** covering progress, a Risks, Assumptions, Issues and Dependencies (RAID) log update, finance, and change control.
- **Monthly project board meetings** to review the project plan and escalate anything requiring senior attention.
- **Stage gateway reviews** to confirm readiness before moving between delivery phases.

We use Microsoft Teams as a central communications channel, giving your team a single place to track progress, ask questions, and stay connected.

## Scalability

We bring the right people, at the right time, without compromising quality or pace. In most cases, we use our permanent UK-based team who share our values and how to work effectively in public sector environments. They bring deep expertise in Appian, user-centred design, agile delivery, and service transformation with a focus on outcomes.

When demand increases, whether due to sprint peaks, specialist requirements, or accelerated delivery, we scale quickly and confidently. We have built a trusted

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network of partner organisations, providing access to UK-based Appian Certified Consultants and specialist expertise across areas including user-centred design service design, and accessibility. This is further strengthened through direct access to Appian’s own Customer Success team.

When we bring partner resources in, they join the CDS team. They follow our governance processes, our ways of working, and our quality standards providing a single, cohesive team.

## Account and Contract Management

Our account management team are located throughout the UK, including local presences in Leeds, London and Edinburgh.

### Client Partner

To support the day-to-day operations and strategic delivery, we assign an experienced client partner team, responsible for maintaining strong communication channels, proactive engagement, and continual value and delivering a high-quality service that continues to meet your outcomes and evolving needs throughout the contract term.

CDS believes the client partnership team is central to communication and ensuring that you always receive the best possible service. Consequently, the services of the client partner team are provided at no cost, demonstrating our commitment to value, partnership, and service excellence.

Your client partner will be responsible for:

- Building strategic relationships with key stakeholders to fully understand challenges, aims and objectives.
- Providing strategic support for continuous service development and cross-pollination of ideas from both industry and best practice.
- Ensuring quality and timelines of all deliverables.
- Facilitating regular account management meetings and performance reviews, both remotely and onsite.
- Acting as the client voice within CDS.
- Managing contractual obligations.
- First escalation route when required.

### Evidence

Our customers consistently tell us that what stands out with CDS is our “can do” attitude. We enjoy solving complex challenges and have built our reputation on delivering excellent customer service, strong outcomes and value for money.

This is reflected in our client feedback and a Net Promoter Score more than 10% above the industry average, a strong indicator of both our delivery performance and the trusted relationships we build with our customers.

## Other Important Information

### Business Continuity and Disaster Recovery

CDS is committed to minimising and managing its exposure to disruption to the business and the services provided to our customers. This encompasses robust systems and processes necessary to maintain continuity of service and operations.

CDS maintains a comprehensive Business Continuity and Disaster Recovery (BCDR) plan, certified to ISO 23001, that defines clear roles, responsibilities, processes, and procedures for assessing and responding to disruptions to ensure continuity during disruptions. Our plan is tested annually with lessons learned incorporated into plan improvements.

Our Business Continuity Management System (BCMS) is underpinned by regular business impact assessments and threat and risk analyses, and annual tests to ensure all contingencies remain effective, current, and fit for purpose.

### Onboarding and Offboarding

#### Onboarding

CDS provides a tailored onboarding pathway, based on your individual requirements.

Onboarding is a collaborative process, through which we fully understand your short-, medium- and long-term goals, and plan our service accordingly, to deliver best value and appropriate resourcing, governance, communication and planning.

Our multi-disciplinary agile teams will work with project stakeholders to understand your project needs and requirements.

We will define and capture ways of working, including definitions of 'ready' and 'done', and identify acceptance criteria for each sprint, underpinned by modern test practices and OKRs.

#### Offboarding

Upon starting the engagement, CDS provides an exit plan for approval. This covers knowledge transfer and documentation, roll-off schedules, data and asset transfer, intellectual property and removal of access / permissions and return of devices / equipment.

Ownership of data contained in any solution belongs to and rests with you; as the service is decommissioned, raw data will be transferred to you. CDS is certified to ISO 27001 for data security and will always adhere to these standards – including data removal and destruction.

## Information Security

CDS holds certifications to international standards - Cyber Essentials, Cyber Essentials Plus and ISO27001 Information Security, encompassing physical security, personnel security, storage, electronic data handling and secure destruction.

We embed 'secure-by-design' principles in our standard service design approach, aligned with security best practises and in addition we provide expert security consultancy.

CDS works closely with National Cyber Security Centre CHECK-accredited providers to conduct IT Health Checks (ITHC)/penetration testing in line with best practice.

CDS staff are BPSS cleared as standard. We can deploy SC, NPPV cleared teams and staff with DV clearance, if required.



## Service Constraints

Attainable service levels will be dependent upon the service performance of cloud suppliers within the service chain. Maintenance windows may apply, and customers should refer to the SLA for the specific service in use.

### Ordering and Invoicing

We recommend contacting CDS before placing an order via G Cloud 14, to confirm and agree scope, scale, SLAs, KPIs, outcomes, etc. We will be pleased to support you to define statements of work that reflect their requirements.

Invoices are issued monthly in arrears, with payment terms of 30 days.

### Pricing

Timescales and costs vary, depending on several factors; we recommend a preliminary review to provide a firm cost.

Please refer to our pricing document and SFIA rate card.

## Industry Standards

CDS delivers all its services to internationally recognised standards, providing customers with confidence that delivery is secure, well governed, and consistently managed.

CDS is accredited to the following standards:

- Cyber Essentials
- Cyber Essentials Plus.
- ISO 27001 Information Security Management.
- ISO 20000 IT Service Management and IASME certified.
- ISO 9001 Quality Management System.
- ISO 14001 Environmental Management.
- BSI 1008 Electronic Information.
- ISO 22301 Security and Resilience (Business Continuity).
- ISO 45001 Health and Safety Management.
- ISO 10008 Evidential Weight and Legal Admissibility of Electronic Information.
- ISO 50001 Energy Management Standard.
- IASME certified.
- ITIL compliant service desk.
- PlanetMark Sustainability.

We comply with the Data Protection Act 2018 and UK GDPR regulations.

## Contact Details

Chris Whitehall  
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Email: [bidteam@cds.co.uk](mailto:bidteam@cds.co.uk)  
Telephone: 07518297376  
Website: [www.cds.co.uk](http://www.cds.co.uk)



# CERTIFICATE OF ASSURANCE

Corporate Document Services Limited

Riverside House 7 Canal Wharf Leeds LS11 5AS

**COMPLIES WITH THE REQUIREMENTS OF THE CYBER ESSENTIALS SCHEME**

NAME OF ASSESSOR : Kurt Metcalfe

CERTIFICATE NUMBER : 30590b83-9532-4856-b047-7e4d3cc128c9

DATE OF CERTIFICATION : 2025-07-11

PROFILE VERSION : 3.2 (Willow)

RECERTIFICATION DUE : 2026-07-11

SCOPE : Whole Organisation



**SCAN QR CODE TO VERIFY THE AUTHENTICITY OF THIS CERTIFICATE**

CERTIFICATION MARK



CERTIFICATION BODY



CYBER ESSENTIALS PARTNER



The Certificate certifies that the organisation was assessed as meeting the Cyber Essentials implementation profile and thus that, at the time of testing, the organisation's ICT defences were assessed as satisfactory against commodity based cyber attacks. However, this Certificate does not in any way guarantee that the organisation's defences will remain satisfactory against a cyber attack.



# CERTIFICATE OF ASSURANCE

Corporate Document Services Limited

Riverside House 7 Canal Wharf Leeds LS11 5AS

COMPLIES WITH THE REQUIREMENTS OF THE CYBER ESSENTIALS PLUS SCHEME

NAME OF ASSESSOR : Elly Beal

CERTIFICATE NUMBER : 107e4854-eda7-403a-81ce-1cb3b4cf4d6c

DATE OF CERTIFICATION : 2025-09-26

PROFILE VERSION : 3.2 (Willow)

RECERTIFICATION DUE : 2026-09-26

SCOPE : Whole Organisation



SCAN QR CODE TO VERIFY THE AUTHENTICITY OF THIS CERTIFICATE

CERTIFICATION MARK



CERTIFICATION BODY



CYBER ESSENTIALS PARTNER



The Certificate certifies that the organisation was assessed as meeting the Cyber Essentials Plus implementation profile and thus that, at the time of testing, the organisations ICT defences were assessed as satisfactory against commodity based cyber attack. However, this Certificate does not in any way guarantee that the organisations defences will remain satisfactory against a cyber attack.