



G-Cloud Specialist Cloud Services:

Service Definitions

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Executive summary – Advalus and Key Clients

Advalus is a niche business consultancy that specialises in bringing technical, commercial and financial advisers together on the Government side. Typically, we support the public sector to evaluate, procure, deliver and implement the more complex G Cloud ICT solutions.

Some key facts about Advalus:

- Advalus is a UK-based SME which has been supporting key government clients since 2003, when the firm evolved from major business consultancies to offer a SME alternative.
- Clients - we have been business and deployment advisers to;
 - the Ministry of Defence;
 - the Cabinet Office,
 - the DWP;
 - the Environment Agency; and
 - the Home Office
- As a CCS Framework advisor, we are also assisting other Government Departments to develop best-value Outsourcing and Shared Services solutions;
- ICT, Digital and Cloud services are by definition subject to ongoing change and likewise the customer's organisation must change to optimise use. The advantage of Advalus and its multi-disciplinary team is that it can help customers to straddle the 'inward' organisational reforms with the 'outward' facing supplier selection, negotiation, and reform issues
- The firm's added value is the leverage that can be achieved for clients by bringing a small number of individual specialists (ICT /technical/financial/commercial/security) alongside the client's own project team to cover the cross section of issues that arise in the transition from project concept through to deployment and transition.

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1 Service Definitions

The following is a brief summary of the service definitions that would apply to each and all of the Advalus Specialist Cloud Services.

The individual service descriptions applicable to Advalus appear in Section 2.

1.1 Overview of Services

Advalus offers a coherent range of technical, commercial, security/cyber, and financial advisory resourcing services to enable our public sector customers to address each stage of the programme and project/deployment cycle for Digital Strategy, Cloud / ICT (from feasibility assessments and business cases through to the conclusion of transition/deployment and benefit assessment).

The firm's approach is founded on the concept that the tri-angular relationship between the clarity of requirements; cost envelope; and the timescales for achievement are the critical reference points for retaining customer control over Digital Strategy, Cloud and ICT acquisitions.

As a consequence Advalus is able to work either 'top down' from a customer's programme or project control perspective, or 'bottom up' on the following typical component activities:

- Business Case and Strategic Reviews
- User requirements; analysis and specification
- Defining 'As Is' Baselines for current customer ICT/ Cloud applications, services and organisation
- Defining and sizing the opportunities to be more efficient or more effective in the use of ICT / Cloud and the deployment of the customer's own organisation
- Market, supplier and business analysis to support option assessment
- Design and development of acquisition strategies to deliver Customer ICT / Cloud strategies and projects
- Cyber security and enhanced service / project assurance
- Investment appraisal and Operational analysis of Options
- Formal business case and approval submissions
- Acquisition and procurement support
- Supplier engagement and procurement evaluations
- Stakeholder management
- Commercial documentation and audit / peer reviews
- Contractual negotiation and securing closure
- Implementation / On Boarding and Integration support
- Transition support
- Governance and management
- Through life support on Change Management and Performance Review

The following items provided the generic service definitions that would apply to the individual Specialist Cloud services Advalus provide (Section 2 of this document identifies those individual services) .

1.2 Advalus Information Assurance

- Advalus consultants hold security clearances applicable to each customer's requirements (up to DV). We can align with each customer's environment for IA purposes and can support up to IL6.

1.3 Advalus Digital Continuity, Backup & Disaster Recovery, Data Extraction

- Backup and restore processes are available off-site for Advalus data.
- Customer data and products / WIP files generated for customers are more usually held on customer systems wherever feasible. This avoids any uncertainty over access, security or freedom of use. In addition our consultants can establish on-site backup and recovery procedures for customers to support local systems.
- Client's data is typically retained, managed and maintained on the customer's systems due to either the security and/or confidentiality requirements.
- Where non-client data relevant to a project is held off site by Advalus then that data is in turn further backed up on servers away from the Advalus main office.
- Advalus staff and advisors will not in normal circumstances extract or remove data from client systems.
- The data handling policies are normally defined on site by the customer to maintain ease of access and adequate security.
- Customer generated data on client systems (e.g. content, metadata, structure, configuration etc.) and a list of the physical data that is retained on the client site will normally be maintained in the customer's PMO.

1.4 Advalus On-Boarding & Off-Boarding

- Advalus does not provide products in the form of packaged applications, digital services, or software – we provide SME resource and professional advice to work with Government clients to define, mitigate and manage these potential developments and implementations.
- Advalus can support as required on a customer by customer basis, the transition from current systems and services to new ICT / Cloud delivery in

conjunction with the in-house team – our support can include the full range of technical service, commercial terms, and organisational transition tasks required to deliver the overall change in performance, cost and time required by both the customer organisation and the project team.

1.5 Pricing

- Details of the Advalus rate card and SFIA equivalent rates are set out in the alongside data within our Store details.
- Advalus support is a resource based SME service team.

1.6 Advalus Service Management

- Advalus provides advisory support rather than a managed service.
- The firm's assignment delivery is covered within its QMS as accredited under ISO9001 2015.
- Our advisory teams for each customer assignment are managed as a 'service' with active on site management of the defined tasks by an appointed project manager (who is in turn accountable to a named Advalus project director for that assignment). The details of that named management and accountability structure for each customer, as well as the assignment deliverables and tasks etc, are set in the firm's letter of appointment for each assignment.
- We have an established set of processes and procedures to deal with any issues raised regarding the performance of both our consultants and our assignment management team. This forms an integral part of our ISO9001:2015 accredited Quality Management System – with clear paths for rapid resolution via escalation, should any issues not be resolvable on site and in short order via the project manager.

1.7 Service Constraints

- Do not apply to advisory services (unless otherwise defined in the firm's letter of appointment and as prescribed by individual customers to reflect access constraints or local circumstances).

1.8 Service Levels

- Do not apply in the literal sense to advisory contracts - as our products are either acceptable as milestone deliverables and warrant payment or not acceptable and the customer retains the payment.

- Our customer accountability is founded upon the definition of outputs and required product delivery via milestones as set out in the customer order and the firm's letter of appointment for each customer.
- Advalus consultants provide ongoing management information to customers about both the assignment and individual product/milestone status. Our consultants are used to providing customer-specific management information during their assignments and at their conclusion.
- The terms of the required customer reporting and the alignment of performance reporting with our deliverable outputs are identified in the customer's letter of appointment. The Advalus project manager will agree with the customer at the letter of appointment stage exactly what management reports will be required and in what format.
- Advalus is flexible in terms of how the reports are both formatted and delivered. We can tailor the existing CCS MI reports or tailor them to specific requirements by agreement with the customer (to include the performance of the consultant /s against targets or milestones agreed with the customer).

1.9 Financial Recompense

- The adjustment to service pricing for any aspect of non-performance is essentially a 100% 'no service – no fee' with recourse via retention of payment by the Customer until a milestone product is accepted.
- In the overall framework agreement, call off terms etc, aggregate levels of financial liability for broader consequences are defined.

1.10 Advalus Training

- As part of the firm's QMS, our consultants are required to carry out both CPD with their own institutes and professional organisations, as well as product development with the firm on sector and technical updating.
- The nature of the services provided are advisory and training can be either a formal or an informal part of the deliverables agreed with a customer
 - Briefings; internal training courses on specific topics;
 - Team meetings where market and solution knowledge is shared.
- The firm does not provide application packages, software products etc other than as support to our consultants – so there are no direct use ICT products or front line Cloud products provided by Advalus that require formal customer training.

1.11 Ordering & Invoicing

- **Orders.** Customers can order services using the Cloud Service pro forma or issue their own Purchase Orders in conjunction with the Call Off terms. The firm would agree a letter of appointment with each customer.

- **Invoicing.** The customer's preferred invoicing processes can be fully integrated with:
- Purchase to Pay (P2P) systems (where available to the individual customers using secure web-based systems)
- Alternatively invoices, timesheets, expense claims and evidence (e.g. receipts) can be scanned and routed to a nominated email account with payments made by BACS (with remittance advices confirmed on line).
- Our QMS and the Framework review procedures ensure that the contracted terms as detailed in our framework documentation on line are applied accurately.
- Invoicing normally occurs monthly in arrears and / or in line with the payment milestones set out in our letter of appointment.

1.12 Termination

- The terms and conditions for Termination are fully documented in the Call Off terms
- The normal notice period for termination by a customer would be 30 days
- As the supplier we would only expect to serve a prior notice by agreement with a customer

1.13 Customer Responsibilities

- The Customer shall provide both access (site and systems) and appropriate office facilities to enable the Advalus advisors to carry out each assignment. The details of the access and accommodation to be provided would normally be confirmed in the letter of appointment.

1.14 Technical Requirements

- Advalus employs an open source policy using office systems based on Microsoft products.

1.15 Trial Services

- The advisory nature of the services provided by Advalus would not normally be part of a trial, unless agreed otherwise with a customer.

1.16 Data Extraction and Removal

- Advalus staff and advisors will not in normal circumstances extract or remove data from client systems.
- The data handling policies are normally defined on site by the customer to maintain ease of access and adequate security.
- Customer generated data on client systems (e.g. content, metadata, structure, configuration etc.) and a list of the physical data that is retained on the client site will normally be maintained in the customer's PMO.

2 Business Analysis (ref: FA Section 2)

The individual service descriptions headings below are indicative; the specifics of each order are by agreement with the customer.

The indicative tasks are in accord with the CCS descriptions within the Framework Agreement service descriptions for Lot 4 in Section 2.

2.1 Service Name:

Business Analysis

2.2 Service Description:

- Advalus can provide Strategic, Programme and/or Project level business analysis, advice, reports and assessments for each client.
- The business cases and assessments we produce and support are typically required for Departmental, Treasury and/or Cabinet Office approval.
- Our business analysts can function as discrete members of your project teams

2.3 Key Features

The component business analysis we provide can cover;

- Defining and quantifying the client's current 'As Is' Baseline in technical, financial and commercial terms.
- Assessing Service Requirements and defining the cost-effective options for improvement.
- Visualising and framing the future 'To Be' conditions within the organisation
- Engaging relevant users and stakeholders within the client organisation.
- Benchmarking against (and developing) genuine comparators – including 'should cost' and 'bespoke' service delivery models.
- Gap assessment and Options to rectify 'Gaps'.
- Cost / Benefit justifications for Service Investments/Improvements.
- Business Case and Approvals documentation;
- Approvals stakeholder engagement support.
- Risk Assessment and detailed modelling.

2.4 Service Benefits

- A thorough, evidence-based approach to each client's business case.
- Advalus encourage a genuine cost/benefit approach to validate and justify client proposals.

- Independent and practical guidance from subject matter experts (SMEs) who can represent the case at the most senior level in Government.
- A core team of financial SMEs and modellers who will work with internal client staff and other technical experts to shape cases.
- The client receives a clear researched and documented view on whole life costs and the impact of change.

3 Project Specification & Selection (ref: FA Section 2)

The individual service descriptions headings below are indicative; the specifics of each order are by agreement with the customer.

The indicative tasks are in accord with the CCS descriptions within the Framework Agreement service descriptions for Lot 4.

3.1 Service Name:

Project Specification & Selection

3.2 Service Description:

- Advalus supports the client production of all necessary documents, service definitions, management of investment approvals and pricing for taking a project from feasibility to the “market place”.
- Advalus supports the client team in the presentation, assessment, evaluation, and conversion of the market response via an auditable procurement process, and a concluded contract.

3.3 Service Features:

The Specification and Selection service we provide can support (as necessary) the client on the;

- Planning, management, and execution of complex procurements.
- Procurement Strategy/‘Route to Market’ options.
- Specification of Requirements (‘SOR’) Definitions and Documentation.
- Design of payment and performance regimes (with relevant financial models)
- Service Requirements articulation and Option validation.
- Cyber security and information assurance
- Management of multi-layered, multi-party investment approval processes
- Procurement process support including evaluation & assessment reviews.
- Contract documentation for requirements, pricing, contract financial models and detailed terms and conditions.
- Bidder short listing – evaluation / interview / negotiation sessions, assessment and selection.
- Achieving contractual close.

3.4 Service Benefits

- Access to an expert team; with extensive knowledge of working on complex ICT/ Cloud procurement issues within Government for over 15 years.

- Advalus combine Technical, Security/Cyber assurance, Financial and Commercial expertise to ensure that client advice is coherent and avoids 'silos'.
- Advalus tailors a team to each client's procurement and deadlines – every Project has individual challenges needing SME expertise and experience.
- Validation of approach through independent peer review and audit.
- Transparency; of process and advisory approach.
- References from satisfied customers to evidence benefits achieved.

4 Programme & Project Management (ref: FA Section 2)

The individual service descriptions headings below are indicative; the specifics of each order are by agreement with the customer.

The indicative tasks are in accord with the CCS descriptions within the Framework Agreement Section 2 service descriptions for Lot 4 .

4.1 Service Name:

Cloud Deployment / Transition / SIAM: Programme & Project Management

4.2 Service Description:

- Advalus will provide experts to work with each client in developing, and sustaining a programme and project management structure that can deliver, and meet Quality and Service Output expectations for that client.
- Advalus experts are established programme management practitioners (Prince 2 and MSP) to ensure alignment with client preferences.
- Advalus recognise that each project and programme face different problems; and we approach each client with a flexible view on role and resourcing. Our financial, commercial, and technical staff can come alongside your project managers and/or reinforce your PMO arrangements

4.3 Service Features:

- Advalus reinforce programme management structures through introduction of relevant Subject Matter Experts (SMEs) into specific roles or as advisory support to the customer's own PMO structure.
- We can deliver or support the PMO as a unit, or on specific project management tasks; such as risk management, benefit management, stakeholder engagement, approvals management.
- Advalus' mix of expertise ensures coherence between the technical, commercial and financial aspects – mitigating PMO delivery risk.
- Advalus encourage genuine transparency and evidence-based reporting; to be clear on actual progress and performance and real delivery risk.
- We carefully consider individual styles and personalities to suit different customer organisations; this is a human service based on proven protocols with the customer owning approach.
- Advalus can experts are established programme management practitioners (MSP, PRINCE 2 etc) to ensure alignment with client preferences.

4.4 Service Benefits

- Our experts can make things happen on the client's behalf, they are experienced individuals, whom clients both like and respect because of their determination to evidence results on the ground.
- Advalus work with the client to agree the mix of internal and external competences, and how to deliver within resource constraints.
- Advalus offer previous client referees to demonstrate actual benefits achieved on complex/challenged projects rather than rely upon assertions.
- Advalus offers a level of enthusiasm and professionalism that you would expect from a SME firm retained on national government consulting frameworks such as Consultancy 1.