

## The Affinity Drupal upgrade experience

One of the  
**many reasons**

our clients  
stick with us



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## Summary of service

Affinity has been building and hosting Drupal based services for both the private and public sectors for over 8 years. Indeed one of our first engagements with GDS was winning and £80,000 contract to deliver Drupal skills to the GDS team.

We build, support and upgrade deeply technical enterprise solutions that include, websites, intranets, extranets and bespoke applications. We have become expert in inheriting existing services and have a well proven onboarding process that includes a level of auditing that enables us to take on the project with confidence that we have de-risked the project and been able to offer some useful insights almost instantly

We have become expert in the upgrade process especially the complex and significant 8 to 9 pathway. We have learnt to identify risk early and deliver effectively and quickly through lessons learnt.

Drupal used to be described as a content management solution but it has grown into much more than just a CMS. Drupal is a best-of-breed globally renowned platform that remains ahead of the curve, with features like its api first approach enabling frictionless integrations with other services.

We have been using and expanding upon the Drupal platform for enterprise clients since Drupal 6 and continue to use the framework to deliver to a variety of user and business needs.

We have a comprehensive portfolio of Drupal 7 and 8 and 9 CMS managed services. Hosted on cloud platforms that are owned by us or by our client. Either way we can offer a 24/7/365 support model and lots more...

## Example Project as experience.

Project: Financial Investigation System  
Client: A National Police Agency  
Website: N/A  
Platform: Drupal

## The challenge

A National Police Agency needed a supplier who could work in partnership with their in-house teams in a hybrid Agile engagement to deliver a new Financial Investigation Support System.

The National Police Agency realised that a lot of the issues they were encountering were down to a combination of the existing system not being fit for purpose due to an increasing set of requirements and increasing complexity a large amount of retro keying was being performed to fulfill the data flows from data silo to silo. UX was a real problem on the legacy system with a real need for a step change.

The successful organisation was to provide discovery, data migration, development, operations, support and maintenance resources for the replacement application. A number of related aspects to the contract included selecting the appropriate technical approach, right through to successful delivery and quality assurance. The provider needed to have a track record in operating Agile as well as the necessary expertise in using open-source, and more specifically, Drupal As well as being expected to work closely with, and indeed within, the National Police Agency. One thing was clear from the start was that the National Police Agency were looking for more than just a development company, data migration from the legacy system was also an unknown the application had been in use for 11 years and no known technical documentation existed.

## The solution

Affinity won this work based on its understanding of requirements, delivery approach and of course cost.

As leading experts in the use of Drupal with a demonstrable track record Affinity was awarded the development and support contract for the new platform.

User experience (UX) and Migration was at the forefront of the requirements, the legacy system had morphed during its long life and it was clear that the original specification didn't map all requirements. Working in a collaborative way the data was mapped and migration planned, mapping user personas of all user groups ensuring that each type of users'



requirements were clearly understood. Rather than simply reinvent the same application Affinity were able to provide advice and recommendations on how some simple changes to business and user processes would reduce ongoing costs and streamline operations. Affinity are no stranger to data migration and integrations but to be handed a 20gb database backup with no technical information was a first. Using a combination of 'Talend' to make the data extraction as straightforward as possible, reforming the data to allow for easier import into the new application. Making use of best practice the application was developed and the service was launched as a public beta having gone through alpha and private beta cycles. The service has been continually updated as part of the continued development cycle which prototyping used in conjunction with lab based testing enabling the sprint team to quickly adapt to changing requirements. Working both on site and remotely the Affinity team have been able to assist the National Police Agency in every aspect of delivering this project through its life cycle.

With so little known about the existing data whilst the development team worked on the application foundation our business analysts and technical architects were able to work with the National Police Agency utilising our knowledge of Drupal and their knowledge of their business processes to plan and align open source modules with business requirements. Sprint planning could then begin.

Affinity's sprint planning involves reviewing the 'Project Backlog' and collaborating with the business team to decide which user requirements will be included in any one sprint. This allows on-going prioritisation of requirements leading to some being assigned a higher value than others. The result is a flexible highly targeted approach giving maximum value for money and time. Development and testing activity begins during each sprint and at the end of each sprint, the delivery team provides a demonstration to business team members. At this time, a vertically integrated version is presented to key business users. This approach, combining experience, compatibility and innovation ensured that Affinity was chosen to deliver this high-profile contract.

The end solution empowers the National Police Agency with self-service accounts and team management for their 11k users reducing the overhead of account management. The training and course management system offers complex workflows, online training courses, event management, invoicing, organisation and sub organisation management, digital asset management and more all within a clean fresh responsive modern application.

## Noteworthy

Security – Official Sensitive – SC staff

Hosting – Through affinity Official level with strict security levels and KPI's and fully supported with a Continual improvement budget and strategy in place. As well as Off-boarding and end-of-life processes in place.

We are now upgrading from 8 to 9

Migration –Utilising our EML (entity mapping layer) and Talend to de-risk the complex unknowns.

## Service Standards

Affinity delivers services inline with the Technology Code of Practice, ensuring the 10 points of the TCoP are adhered to.

## Security Standards

Affinity have a security first philosophy having a dedicated DPO, with a wealth of knowledge and experience delivering services which store 'Official Sensitive' data.



**ISO 27001**



**ISO 9001**



**Cyber Essentials Plus (IASME)**



## Governance and Service Assessments

Our team have worked on a variety of projects which have been required to follow the service manual meeting the service standards. Working with the product owner to ensure that if required assessments are carried out throughout the project to ensure smooth go lives. Our dedicated team members are able to assist stakeholders in service set up and transitions through the entire life cycle of digital services.

In any service assessment our agile, collaborative approach, and always taking a user centred approach in line with the Service Manual and Service Standard, make it easy for the service owner to talk the panel through the new service, confident that the service meets user needs and applicable standards.

In order to be kept up to date there are various sources of information which flow into our organisation, examples include subscriptions to Alpha Gov's govuk-front-end-toolkit git repo, subscriptions to notifications of any change to the Service Design Manual components, members of various slack channels, as well as having a multi disciplined team who are always keeping an eye out for the very latest updates and releases.

## Hosting and Infrastructure Management

### Infrastructure Migrations

Affinity has extensive experience of running services on a variety of cloud providers (AWS, Azure, GCP) as well as migrating services to, from and within the environments.

We use the Terraform infrastructure-as-code software tool (<https://www.terraform.io/>). This is very similar to the AWS CloudFormation approach, but is 'cloud-agnostic', which allows us to use one set of templates with different cloud providers depending upon requirements.

### Ongoing Support

Over the last 15 years we have gained significant experience of maintaining and improving services. This covers support for

any issues/outages, infrastructure/package updates, day-to-day requests, such as giving users access to test environments, investigating performance issues, etc. Over the last 5 years we have moved many services into the Cloud fully or in a hybrid model and as the service matures we are able to offer more and more Robust, secure and cost effective solution to our clients.

### Cost Saving

Wherever possible we work with clients to reduce their hosting costs whilst maintaining service levels. In the case of AWS we can look to reserve instances by the hr, for example EC2 and database, thereby reducing costs. We also look to right-size all of the services, for example not running services of a considerably higher specification than is required. We can also look to schedule the turning off of some services, for example taking test environments down out of office hours.

### Continual Improvements

We always look to improve the quality of the services we are running for clients and draw upon our experience and our teams keep up to date with developments across a wide range of technologies to ensure that we can proactively offer recommendations whenever possible. Whilst we can run any services for our clients, we have developed a special area of excellence in developing and maintaining sites on WordPress, Magento, Drupal and Umbraco. We find that innovations and developments within all of these technologies can feed into the others. In terms of hosting, we support and develop sites on Azure, UKFast, Rackspace etc., which again all feed into the knowledge within the team.

### Incremental Development

With the Government online services that we work on, for example the sites for a national law enforcement agency, a continual reference point will be the vision and objectives that have been established for the agency. These will be subject to periodic review and the roadmap that is put together for services will be focussed on delivering those objectives. In the case of the Cabinet Office, the Single Departmental Plan will presumably be an important reference point.

If the service or services being delivered



involve multiple teams or business units with their own objectives, then it's important to view them all alongside each other to highlight any common objectives, dependencies, etc.

On a practical level, we make extensive use of Jira for capturing requirements, scoping and estimating effort, prioritising features, sprint planning, development tracking and sprint reviews. The backlog in Jira is used to ensure that all features and requirements are captured and they can be re-ordered to reflect relative priorities. We can link tickets to capture dependencies and use a combination of epics, components, labels, etc. to allow grouping and filtering. The Jira tickets are also used to flesh out the technical approach to satisfy requirements and provide an excellent record of how work to satisfy a requirement has evolved.

When planning, we ensure that we don't forget about support tickets and tickets to address technical debt. This can be difficult as people are understandably keen to focus on new features. Techniques such as the MoSCoW method can also be helpful in prioritising requirements. It's also essential to have all of the relevant stakeholders involved, such as product owners and technical staff.

In terms of scoping sprints, Affinity will assess stories in terms of story points to capture relative effort required. When the priorities have been collaboratively agreed then we can scope out upcoming sprints to ensure that an appropriate number of story points are being tackled in each one. We will use charts available in Jira such as Burndown Charts, Velocity Charts, etc., after each sprint to reevaluate the story points that we're aiming to deliver in sprints.

In terms of time-tracking, we use Harvest and Harvest-Jira integration to track time spent on tickets. Using this in combination with Jira sprint reporting, we have a clear view of the time being spent on sprints and the features that can be delivered.

External and internal standards have to be factored in at all stages including scoping the work, technical solutions and testing. For example coding standards can be enforced using static code analysis during

development. Accessibility standards need to be considered throughout development and can be tested and continually monitored using various tools. A further example would be considering GDPR regulations throughout requirements gathering and service assessments.

In terms of formal test and signoff, we will let clients know when a release is available for testing within the appropriate pre-live environment. The client will have been given release notes at this stage, to confirm the scope of the release and highlighting any particular testing that should be carried out. At this point local testing will already have been carried out by developers and code reviews will have taken place. This requirement for code reviews is enforced within GitHub (or Bitbucket, etc.) by making pull requests mandatory for merging into the appropriate branches and insisting upon a review for all pull requests. It is also worth noting that we use static code analysis tools such as WhiteSource Bolt for GitHub which will flag up any potential vulnerabilities being introduced into the codebase as a result of a merge. For local testing we will also use tools such as BrowserStack for cross-device testing and further tools for SEO, accessibility etc., depending on the nature of the changes. The client's testers will then normally regression test changes, based on established test scripts, and test any new functionality that has been introduced.

Any issues will be tracked in Jira and when a release has been thoroughly tested, the client will update tickets accordingly, in terms of comments and status. The testing may then have to progress through further test environments, depending on the client. When fully signed off, the release date and time will be confirmed and the changes will be deployed using established procedures. Post deployment checks will be carried out by both Affinity and the client and monitoring, such as AWS CloudWatch, will be reviewed in case of any abnormal behaviour. In some cases we also have scheduled scripted browser checks monitoring specific transactions in the live environment.

## External Testing



## Penetration Tests

We frequently support clients throughout their penetration tests and in resolving any issues arising from them. This will include:

- Working with penetration testers to give them the access they need.
- Ensuring that we work with penetration testers to confirm scope.
- Ensuring that penetration tests don't adversely impact the performance on live sites.
- Working to resolve any issues flagged up by penetration tests. This can include making application / infrastructure changes or agreeing exceptions for future scans.
- Ensuring that all temporary access is revoked upon conclusion of the testing.

We have worked with the NCC Group, Secarma and Commisum on penetration tests for numerous clients.

The very nature of penetration tests dictates we can't discuss specifics, but recent actions that have been identified and then resolved from penetration tests are:

- Customer login: No lockout mechanism after failed login attempts
- Outdated javascript library
- Predictability of URLs, potentially allowing other users to view assets (found in 3rd party module)
- Open port on server

## Accessibility Assessments

Again we have a great deal of experience supporting clients with these assessments and doing remediation work. We also have experience with tools such as Sitemorse (<https://sitemorse.com/>) which can be used to continually assess sites against the latest accessibility compliance requirements, along with UX, SEO and GRC (governance, risk and compliance). We continue to use Sitemorse to track the South West and Taunton Council site (<https://www.somersetwestandtaunton.gov.uk/>) that we developed for them and which we continue to support, along with sites for several other clients.

The South West and Taunton Council

site is currently 7th out of 300+ UK local government sites being tracked: <https://sitemorse.com/index/uk-local-government/2019-q4>. The overview for that site can be found here: <https://sitemorse.com/index/report-analysis.html?rt=1622&rid=267604>.

During development of that site and others we have also made use of the WAVE Web Accessibility Evaluation Tool (<http://wave.webaim.org/>) and Axe (<https://www.deque.com/axe/>).

We have also engaged early with external disability user testing groups during iterative development, to confirm that a service was fit for purpose, an example being South Somerset District Council's new website.

## Security Reviews

Having worked through various ITHCs in the past for .gov projects, our team has the knowledge and experience to be able to implement security from the outset, mitigating and minimising the need for remedial action before reviews take place.

## Tiers of Support

### Flexible Resource Model

Affinity is a full service digital agency able to offer a full lifecycle service to its clients and as described in our costs section, we have a blended man-day rate of just £645 across all of our services, meaning you can engage with not only the declared specialists for this project but our whole team from UX and design experts to solution architects and service designers very simply and efficiently.

We understand that there will be peaks and troughs in both our support role and continual improvement projects/sprints. We are used to working in this way with our clients and have a well tried and tested process to manage non linear activities. That said, you will have a dedicated Technical Lead and Account Manager, supported by developers, who will all gain an appropriate and interchangeable depth of knowledge of your environments and applications to ensure we can ramp up the teams when needed. This core



team will call upon other experts as and when required. We see this project and the Cabinet Office as being a tier 1 client for Affinity, with our company directors involved in your project regularly.

## Availability and Response Times

Affinity has a standard support and maintenance agreement that is designed to flex through a collaborative team approach to what works best for the project and all parties involved.

We track resource usage against specific activity to manage forecasting and efficiency. We use on-line tools like JIRA and Harvest to capture and report with.

We can offer 24/7/365 environment tier 1 support via ourselves and our previously mentioned AWS partners Databarracks.

The following table has been taken from our standard support and maintenance agreement template though as indicated above, this can be tailored to your specific requirements if needed:

## Communication on Support

**Affinity uses Jira Service Desk to manage support and maintenance, where service users can raise service requests either through their dedicated Service Desk portal or via a support mailbox (which automatically raises a ticket).**

As part of service onboarding, workflows, notification schemes, response times and all other service parameters can be set in Service Desk according to agreed service levels.

Our team will use Jira to keep support users updated on progress and to capture and communicate any aspects of the request being raised. We will work with you to define the levels of access and ticket-level visibility needed by team members within your organisation.

The Affinity team will use the work logs feature within Jira to estimate, record and track developer time spent on each individual ticket. We integrate our Jira environments with Harvest (our time tracking system) to enable us to accurately monitor and measure time spent, and for reporting purposes.

|                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Priority 1 (P1)</b><br>Very urgent bugs seriously impacting a range of services or operations. | Upon notification of an agreed P1 bug, Affinity will, within 1 hr, endeavor to identify and fix the problem or identify and provide an estimate of the time to fix. Where necessary, work on P1 bugs will be given priority over lower priority bugs in order to enable corrective action at the earliest opportunity. All available resources will be allocated to rectification of the bug as appropriate and in order to undertake corrective action at the earliest opportunity. |
| <b>Priority 2 (P2)</b><br>Bugs seriously impacting a narrower range of operations.                | Upon notification of an agreed P2 bug, Affinity will, within 1 working day, endeavor to identify the problem and provide a time to fix. In the event that work on P2 bugs is paused in order to redirect resources to P1 bugs, work will recommence at the earliest opportunity.                                                                                                                                                                                                     |
| <b>Priority 3 (P3) and priority 4 (P4)</b><br>Other bugs not included in the above.               | Affinity will endeavor to commence work on P3 and P4 requests within 5 working days of acknowledgment of receipt of a bug notification and within normal working hours.<br><br>In the event that work on P3 and P4 bugs is paused in order to redirect resources to higher priority bugs, the client will be notified and work will recommence at the earliest opportunity.                                                                                                          |



We will agree at the start of our engagement on the nature and frequency of account level reporting - which will include service usage and other KPIs (e.g. time to resolution, service availability/up-time, service breaches). Timesheet reports will be included as part of this, extracted from Harvest, to show how and where support time has been utilised.

Service review meetings will take place with our account manager on a monthly basis to go through performance headlines together, and to offer a regular opportunity to review support delivery and identify opportunities for further improvement.

## Costing

Affinity works on a simple blended man-day rate that means the price is not affected by which team members are working at any one time – cost is constant across all our specialists.

Our declared blended man-hour rate for Gcloud projects is £100 per hour ex VAT. This rate is also applied to Support, at all response levels/times.

## Affinity Project Management

### Team Working, Agile Working and Collaboration

Affinity is in an excellent position with its multiple methodology offerings. We recognise that there is not a “one shoe fits all” approach to delivering successful projects and have developed and matured our own processes to match the differing needs of our diverse client base.

Our mainstay method utilises a core iterative development team following tried and tested Scrum agile principles. We have tailored the entry points to this core competency to enable us to support everything from formal “waterfall”

engagements to “full agile” projects and most things in-between.

Ultimately we have modelled our approach to suit the needs of our clients rather than dictating one specific engagement process; we can fit in where you need us and deliver in a way that gives you the most benefit. As a key to this, early in any engagement we help our customers understand their own strengths and competencies in project processes and produce an offering that dovetails into a customers’ organisation rather than being at odds with it.

### Affinity Agile

Our full Agile project process works on an iterative backlog definition and refinement cycle that feeds into our core development scrum process. This is an industry standard approach and as well as operating perfectly on its own, can also plug into large-scale Agile programme methods such as the Scaled Agile Framework (SAFe).

This highly collaborative approach puts your project at the heart of our company and delivers a cohesive end to end process from your Project Roadmap, Product Owners and Analysts downwards. We will justifiably have high expectations of your consistent daily engagement with us in stand-ups, refinement sessions and story-card workshops to make your project a success.

### Affinity Waterfall

Many of our clients are seeking a traditional waterfall engagement and we equally welcome that approach. If there are no significant uncertainties in your own requirements, we will work with you in an elaboration phase to formally detail them together. Once defined, we will happily deliver against a set budget and specification. We add some further value to this approach by vertically or functionally dividing up your requirement in-house and



iteratively developing it within our Core team. This means that change control can be managed better (and minimised) should your documented vision change or something unexpected happens.

## Affinity Agile Hybrid Approach.

We are realists – we know that a full Agile engagement across company boundaries is hard to achieve and also in an uncertain world that Waterfall requirements can and do change. Unless an organisation has reached a reasonable level of Agile ‘maturity’ it may actually be culturally or organisationally impossible for them to work in a fully Agile way.

We can solve this and we will do this in two ways:

## An 'out of the box' approach to technology.

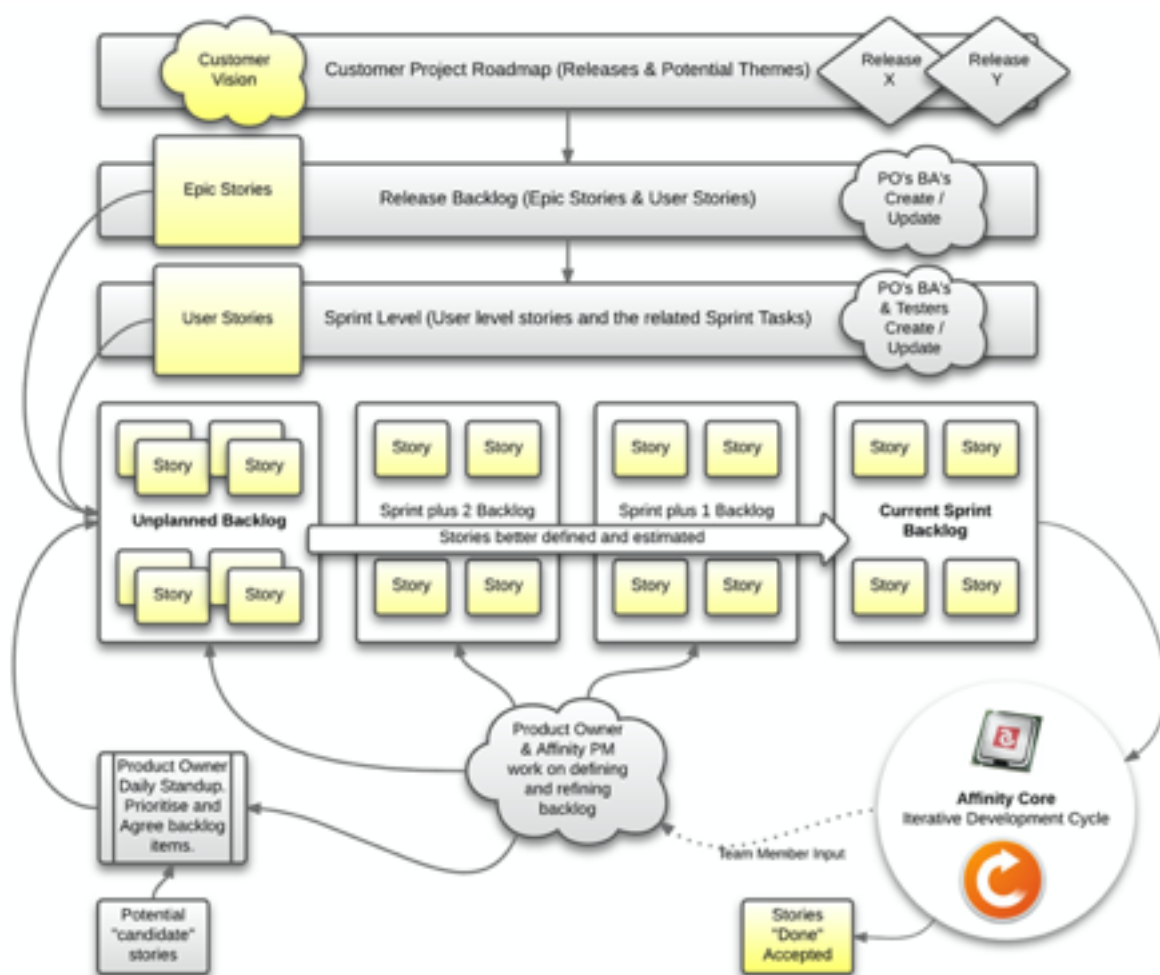
We will select and propose suitable open source packages, modules and templates that we believe can cleanly offer the solution that you are seeking 'out of the box' without the need for fundamental code writes at a low level. We promote taking this more straightforward approach

to technology choice so that we can deliver you business value as soon as possible rather than building something from scratch.

Any package solution will require levels of configuration and customisation, however if the underlying business processes that they offer do indeed deliver your needs, then there is no need to re-specify those processes in agile story cards, and carry out a detailed business process mapping before we can start delivery.

## A lightweight Agile backlog

Tied neatly to the above, we will embed our own agile expertise into your project and guide some of the Analyst and Product Owner activities particularly in the early iterations. Most importantly as we will have proposed technologies that minimise the need for the detailed requirements work that consumes a lot of time, you will be able to step back a little from the daily refinement and story breakdown work that would be present in a typical Full Agile engagement and predominantly focus on acceptance of the project deliverables at the end of each iteration.



## The Full Agile Requirements Backlog

Managing and maintaining the product backlog is the key to a successful agile delivery, and we will wholly support those customers with a mature agile process in-house and the resources engaged and committed to act as Product Owners to dictate the project.

### Our five step process to backlog

management is lightweight and consistent with industry standard practices:

#### Step 1 - Project Roadmap

|          |                                                                                                                                                                                                               |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity | Project Sponsors and Product Owners meet regularly to define and maintain Project Roadmap.                                                                                                                    |
| Outcome  | Aspirational dates for releases and potential Themes for those releases.                                                                                                                                      |
| Note     | Depending on the scale of a Project, this may only be needed at the start (i.e a single project release). In larger engagements it may be needed monthly, bi-monthly or quarterly depending on company vision |

#### Step 2 - Project Backlog formation

|          |                                                                                                                                                                                                               |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity | Product Owners supported by Business Analysts and Architects break down the Themes into Stories (these may be 'Epics')                                                                                        |
| Outcome  | Stories in the Unplanned Backlog                                                                                                                                                                              |
| Note     | This is an ongoing activity of Product Owners and Business Analysts throughout the project lifecycle. Architectural input can be recognised in the form of acceptance criteria or notes to Software Engineers |

#### Step 3 – Story Sizing

|          |                                                                                                                                                                                                                                                                 |
|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity | Product Owners, Business Analysts and Team Members assign relative complexity rating to User Stories in the Backlog                                                                                                                                             |
| Outcome  | User Stories with complexity rating                                                                                                                                                                                                                             |
| Note     | The Fibonacci sequence will be used for complexity values. This is an iterative process of refinement and complex stories will need significant further analysis and breaking down into smaller stories before they can be played by the core development team. |

#### Step 4 – Prioritisation

|          |                                                                                                                                                              |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity | Product Owners, assisted by Business Analysts prioritise the User Stories according to business need and in the light of current and predicted team Velocity |
| Outcome  | Prioritised User Stories                                                                                                                                     |
| Note     | Ongoing activity of Product Owners as priorities may change all the time                                                                                     |

#### Step 5 – Scheduling

|          |                                                                                                                                                                                                                                                                                            |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity | Product Owners and Business Analysts meet on a daily basis to assign stories for the next two sprints and review any stories that have emerged during the current sprints.                                                                                                                 |
| Outcome  | Stories assigned to sprints +1 and +2 (and current). New Stories added to the backlog in consideration of the overall Prioritisation from Step 4.                                                                                                                                          |
| Note     | New stories can emerge at any time. They are reviewed by the Product Owners and Business Analysts who agree whether or not the story should be added to the backlog. The aim is to have a two sprints worth of work ready and prepared to be played by the core scrum team at any one time |



## A note on collaboration

A Full Agile project is a highly collaborative process. During the whole Agile lifecycle there will be user stories being generated by Product Owners and broken down into smaller stories all the time. There needs to be very regular meetings of all parties interested in the scheduling of the backlog to discuss and agree the scheduling of these stories and also any new “release candidate” cards that have been generated outside the backlog. It is vital that the work being planned into upcoming yet un-started sprints is still what is required most urgently so Affinity will be looking forward to a constant engagement with empowered Product Owners from the customer during the lifecycle of the project.

## Waterfall

Our waterfall project management process follows industry recognized phases and milestones across the software development lifecycle. Following a successful tender stage the project can be formally commenced with the appointment of appropriate personnel to the Project Board, and their responsibilities agreed.

The Project Board will meet on key milestone dates and as required throughout the project lifecycle as/when required (but at least on a monthly basis). The board will consist of:

The ‘Project Executive’ will have ultimate sign off of the project milestones/deliverables. They will also be responsible for overseeing quality assurance, risk mitigation and communication between the business and the project.

The ‘Senior User’ will be responsible for ensuring that the deliverables meet the requirements of all relevant ‘end’ users.

The ‘Senior Supplier’; one of Affinity’s Technical Leads. They will be responsible for ensuring that Affinity is delivering as required, the technologies being used are appropriate and that the deliverables meet the requirements of the Project Specification Document (PSD).

The ‘Project Manager’; provided by Affinity. They will have overall responsibility for managing the project through the various development phases.

## Inception phase

This phase follows the successful completion of contractual negotiation and project commencement; the key outcome is total clarity of the shared project vision.

We first consider all information you have provided and explore in detail the project requirements. As part of this process we:

- Gather and audit all source materials, relevant documentation and existing assets
- Review all internal/external briefing documents
- Review resources
- Analyse the intended audience/users
- Confirm the required project outcomes
- Identify and agree critical dependencies

A high level milestone chart is then prepared in order that initial tasks and responsibilities can be identified.

### Milestone 1:

The aims of this is to:

- establish clear and positive communications between all project members and define the most appropriate communication channels.
- agree the project concept, business case, and draft milestone plan
- agree the high level requirements list
- agree the disclosure process and project governance

This will ensure that all parties feel sure that they have a full and clear picture of all aspects of the project.

### Elaboration phase

This phase builds upon the successful conclusion of the Inception phase, the Key outcome is absolute agreement and documentation of the project components.

With all the necessary information from the prior phase collected and reviewed, we undertake an analysis of all requirements at a much more granular and detailed level and draft the Project Specification Document (PSD). This document confirms the following:



- A summary of the project scope
- Confirmation of all deliverables
- Communication Plan
- Functional specification
- Technical specification
- Full project plan/GANTT chart
- Project team roles and responsibilities.

In simple terms this means we explain what we will do, how we will do it, how long it will take and who will be involved. The drafting of the PSD is subject to formal change control throughout its revision.

## **Milestone 2: Project Specification Document Sign-Off.**

Formal approval of the Project Specification Document is a critical dependency; the project cannot proceed to the next phase until this has been actioned. After this point, the approved PSD can be appended to the contract if appropriate.

## **Construction phase**

The Construction phase builds upon the successful completion of the Elaboration phase and approval of the Product Specification Document.

Depending on the scale of the project, the development cycle may be repeated several times to allow a phased release of deliverables for internal and user acceptance testing, this will be managed through our normal Iterative Development cycle.

## **Milestone 3: Construction Meeting**

The aim here is to formally test and sign-off all of the newly-developed components from the cycles of the Construction Phase. Dependent on the scale of the project it may be pragmatic to have a range of these meetings to coincide with major deliverables from the phased development cycles.

## **Transition phase**

This phase builds upon the successful completion of the Construction phase and leads to final population of the website and delivery and project completion.

Release candidate(s) are now prepared which, subject to approval, are packaged and delivered to the client in the agreed format (detailed within the PSD). Appropriate handover and training is then provided together with the necessary deployment.

## **Milestone 4: Transition (Final) Sign-Off Meeting**

The aim is to formally sign-off that everything has been delivered and the project has been completed satisfactorily. The project could now move into "Business As Usual" (BAU) with Affinity assuming a Support and Maintenance agreement has been negotiated and is in place.

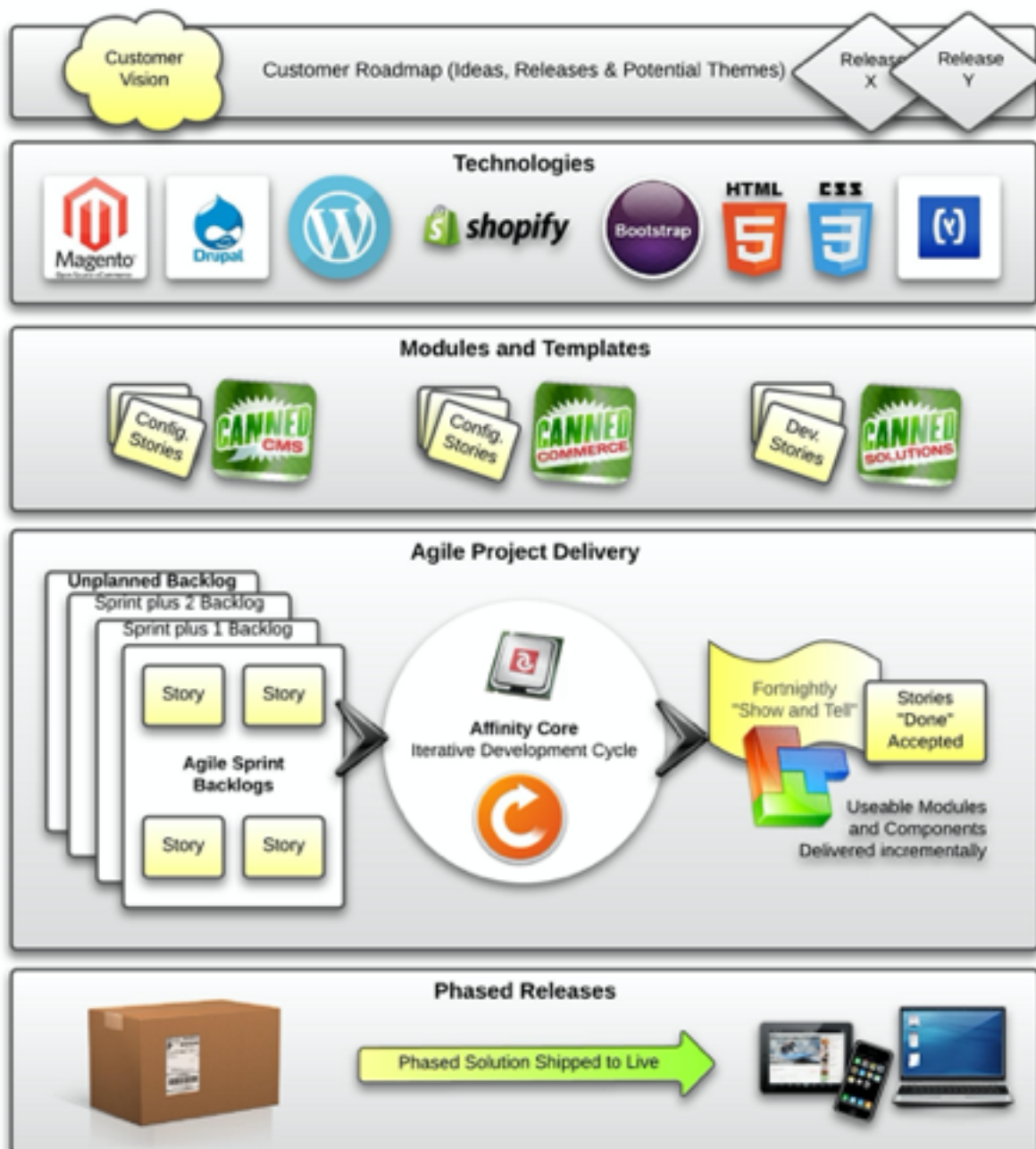


## Affinity Hybrid Agile Approach

Our Hybrid Approach gives the best solution and the best outcome for companies who are on the agile journey but may not yet have matured their own processes enough to be able to manage a full Agile 3rd party engagement. It still provides a Full Agile 'feel' and is recognisable and auditable as an Agile Approach in its own right.

## Customer Roadmap

We spend some time with you understanding your needs. We look at your aspirations, your problems and your potential company or divisional roadmap to develop a cohesive and realistic approach to solving the challenges you are facing.



## Technologies

Once we have a better feel for your requirements we will propose some potential technologies that we know will offer a functional solution to your requirements, we will evaluate and validate this with your enterprise architecture team as necessary to ensure a non-functional and system integration fit as well.

## Modules and Templates

Once a clear Technology path has been validated we will demonstrate modules or pre-built business processes that are available in that technology to suit your needs. These may be in a 'raw' unconfigured state, however we will be able to give you a very good idea of what the end solution would look like and could deliver to you.

Because we would be promoting a modular approach with configurations and some "light" coding changes rather than building a solution from scratch, much of what would be discussed in a "Full Agile" project is not required. We will already know much of what would be needed to achieve a final product for you from the building blocks we propose, and we do not have to re-define the pre-built workflows and business processes that the Technology is offering.

This means that we can create a lightweight agile backlog with a relatively small input from you (most input will be relating to visual look and feel), and can then begin to play those "user stories" into our Core Delivery Team as with any Agile project. If we have already carried out this implementation-type for another client, much of the backlog will be "pre-canned" user stories from prior experience.

We can move faster and be more Agile, by being Hybrid.

## Agile Project Delivery

Our Core Iterative Project delivery team will deliver the backlog in the priority order that most suits your business requirements and you will be welcome to attend stand-ups should you wish to. Most of your efforts can be focussed at fortnightly show and tell sessions, and in the acceptance of the components and modules that we are delivering on this iterative basis.

## Phased Releases

Depending on your business requirements we can take the potentially shippable product components and modules from above and package them up for staged releases to match your roadmap, or if you wish we can simply make a single release when the whole end-to-end business solution is ready to be deployed.

## Training

How to manage and use the admin interface of the new system will form part of the iterative development cycle as we will be working and educating your team in a collaborative way. This will be augmented with a planned training phase in the Transition Stage, when the solution can be used from end-to-end. We will set up new user groups for other Key stakeholders and help your team teach these users how to access and use their bespoke interfaces.

## Timescales

Clearly defined from the outset and monitored regularly.

## Onboarding

### Services from Incumbent Agencies

In terms of onboarding the services from the incumbent agencies, we would ensure that we cover the following:

### Agreeing roles and responsibilities within the onboarding exercise

We would normally start by jointly agreeing all of the people that should be involved in the onboarding process and what they could contribute. We would then have a kick-off session with those individuals, to confirm that we've got the appropriate people involved and to put together an initial set of follow up actions. From the Affinity side this would typically include a developer, solution architect, project manager and account manager.

### Agreeing appropriate timescales

It's important for everyone involved in the onboarding processes to understand the timescales we're working to. In this case, the timescale for each service will be dependent on the overall plan which will have been put together for the onboarding



of all services. A discussion would have to take place as to whether Affinity progressively takes on responsibility for each service as its onboarding exercise is completed, or whether we complete the onboarding for all service and then take on responsibility for them all at the same time.

## **Tracking of actions throughout onboarding**

It's important that we track all of the onboarding actions to ensure that everything that needs to be done is done and that individuals know what's expected of them. It's also important to ensure that all outcomes are documented.

## **Gaining all relevant access to systems, code repositories etc.**

This is critical to ensure that we can maintain services efficiently and that delays aren't introduced as we take on support. Taking our onboarding of the Glow Blogs network for Education Scotland as an example, we ensured that we had the following:

- Developer user logins set up in the single-sign-on system RUnify (<https://www.rm.com/products/rm-unify>), covering integration, explore, staging and live environments. This gives access to WordPress, along with other services.
- Access to AWS accounts with appropriate permissions.
- Access to code repositories (Bitbucket, GitHub, GitLab, etc.).
- Server SSH access, in this case to the Bastion instances.
- Microsoft Teams access, used by Education Scotland to make the monthly reports that we upload for them available to staff internally.
- Access to Education Scotland's Jira projects, allowing us to see the backlog of tickets they have on there.

## **Ensuring that we have access to all of the relevant documentation and code**

Access to all of this information is essential for us to be able to take on services effectively. An indicative list of what we'd be looking for within this:

- All codebases - ideally these would be in the form of version controlled repositories, so that we can see the history of work done on the system.
- Architecture documentation.
- Application documentation.
- Disaster recovery procedures.
- Business As Usual documentation.
- Runbook.
- Outcomes from any previous penetration tests, accessibility assessments, load testing, disaster recovery rehearsals, etc.
- Existing knowledge base for handling support issues.
- History of support tickets, as these might help in resolving future issues.

## **Ensuring that any ongoing support tickets, issues, etc. are handed over appropriately**

To ensure continuity of service, we would ideally want any open tickets to be made available to us so that we continue to work on those. As already mentioned, we would ideally want access to all closed tickets as well in some form, as these can be helpful in resolving future issues and to put them in context of the system's history.

## **Validation of processes and access alongside previous supplier**

We've found on numerous occasions that it's helpful to run through some support processes whilst the previous supplier is still engaged, to ensure that questions can be raised with them immediately. For example, when onboarding Glow Blogs for Education Scotland, Affinity ran through a full system build and deployment to a test environment, whilst the previous supplier was still engaged. This highlighted the fact that the build process had only ever been run previously on Apple Macs and needed several updates to run successfully on Windows or Linux machines. It also highlighted some further access rights which were required. Surfacing and resolving these issues before the processes have to be run for real, ensures that we have the smoothest handover possible.



## Disaster Recovery

In a true collaboration Affinity work with clients to ensure that risk is minimised, appropriate Disaster Recovery Plans will be established to ensure that in the event of a crisis there is a well planned and thoroughly tested recovery process in place.

Recovery Point Objective (RPO) and Recovery Time Objective (RTO) will be established which will help to plan the backup policy in place. A good Disaster recovery plan is only a good one if it has key metrics which can be tested to ensure that the objectives can be met.

Responsibility for Business Continuity and Disaster Recovery (BC/DR) is allocated according to the roles and responsibilities of the ISO 27001-based Information Security Management System. Our BC/DR is tested at least annually and as Covid has demonstrated works as intended.

## Offboarding

Affinity is actively seeking long term relationships and as a full service digital agency is able to offer a full life-cycle service. We take off boarding as seriously as onboarding.

We will work with you during the Elaboration stage to establish an offboarding strategy based around our tried and tested offboarding model flexed to suit your unique needs. This includes giving you the ability to off board for any reason with just 3 months notice if necessary.

## Options for Future Work

Our business model allows us to scale up rapidly using trusted colleagues from around the UK who have all adopted Affinity's ways of working and QMS processes and security, as and when required, (we do not employ any offshore staff or services). This approach was introduced into the company at its inception over 15 years ago as part of our aim to remain software agnostic but evangelical about the use of open-source technology wherever possible.

Over the years there have been a handful of open-source solutions that have proved to be world class products and have therefore become the right choice for many of our clients. This has inevitably led to us becoming expert in their implementation and optimisation. WordPress is one of those platforms and as such we have an extensive team that can support our WordPress portfolio. This also applies to onboarding new sites.

