

Project & Portfolio Management SaaS (SAP S/4HANA & Unit4 ERP)

G-Cloud 15 (RM1557.15)

Service Definition - ArvatoConnect

Company overview

ArvatoConnect is 100% owned by Bertelsmann SE & Co. KGaA, the ultimate parent company of Bertelsmann Group a global, financially stable company. In 2024 the group's businesses, with over 145k employees, generated revenues of €18.7 billion and €3.2 billion EBITDA globally. Bertelsmann, provide the business with long term stability, investment and also global partnership opportunities. This enables ArvatoConnect to support the UK BPO and Outsourced Services market. Bertelsmann's strategic focus is on a fast-growing and high-earning digital, international and diversified Group portfolio. Businesses in which Bertelsmann invests have long-term stable growth, global reach, sustainable business models, high market-entry barriers and scalability.

Within UK public sector we are recognised for providing high quality, complex and compliance heavy solutions, not only as a current and proven provider within both central and local government, but also as part of all of the key frameworks, the mandated route through which the public sector procures BPO and CRM services.

ArvatoConnect is a clear leader in several vertical markets, supporting a number of the world's leading brands, including the challenging and highly competitive automotive space, where we are engaged delivering FCA regulated services.

Our technology partnerships, combined with our deep domain industry expertise have enabled ArvatoConnect to successfully deliver business transformation and digital enablement for our clients, resulting in improved efficiency, reduced cost to serve and, importantly, improved customer satisfaction.

With an embedded culture of partnership supported by a strong, highly experienced leadership team, ArvatoConnect is recognised as one of the leading outsource providers in the outsourcing market. The scope of our services includes –

- BPO and Shared Services.
- Contact Centre Solutions.
- Customer Experience Management.
- Digital Communication Solutions.
- Automation and AI Consultancy and Implementation.
- Financial Services Management (FCA Accredited).

The UK HQ is situated in Datchet (Windsor) Berkshire with sites in Newcastle, East Yorkshire and Swansea. The Swansea site is our principal BPO and Shared Services facility.

Service Description

Our Project & Portfolio Management SaaS service is a cloud-hosted application supporting the planning, delivery and oversight of projects, programmes and portfolios. The service enables public sector organisations to manage project activities, resources, costs and risks within a secure and governed environment.

The service supports configurable project and portfolio structures, enabling buyers to plan and track work across multiple initiatives while maintaining visibility of progress,

dependencies and performance. Portfolio-level views support prioritisation, governance and decision-making aligned to organisational objectives.

The service integrates with financial management, resource management and reporting systems, supporting end-to-end project lifecycle management from initiation through delivery and closure. It can be deployed as part of a wider ERP or performance management landscape or used to modernise legacy project management tools.

Delivered as a fully managed SaaS service, the solution removes the need for buyers to manage infrastructure, upgrades or platform maintenance. The service supports compliance with UK public sector governance, data protection and security requirements while improving control, transparency and delivery confidence across projects and portfolios.

Service Features

- SAP S/4HANA project and portfolio management configuration supporting programme delivery
- Unit4 ERP project management for public sector organisations
- Cloud-hosted PPM SaaS supporting projects programmes and portfolios
- Project financial management including budgeting forecasting and cost control
- Portfolio prioritisation and governance aligned to organisational objectives
- Resource planning and allocation across projects and programmes
- Integration with finance procurement and HR systems
- Role-based approvals supporting project governance and audit requirements
- Reporting dashboards for project performance risks and benefits
- Ongoing PPM SaaS support configuration and optimisation services

Onboarding and Offboarding

The following is an example of a typical implementation and deployment plan deployed with as number of SaaS clients and includes key milestones and a general timeframe:

Initial Planning and Preparation

- Define Objectives: Identify the goals and objectives for the implementation of the application.
- Stakeholder Engagement: Engage key stakeholders and form a project team.
- Infrastructure Assessment: Assess current infrastructure and plan for any necessary upgrades.

Process Identification and Design

- Process Discovery: Identify and prioritise processes for automation.
- Process Definition Document (PDD): Create detailed PDDs for selected processes
- Solution Design: Design the automation solutions based on the PDDs.

Environment Setup

- Development Environment: Set up the development environment for the Platform.
- Test Environment: Establish a test environment to validate processes.
- Production Environment: Prepare the production environment for deployment.

Development and Testing

- Unit Testing: Conduct unit testing to ensure individual components work correctly.
- Integration Testing: Perform integration testing to validate end-to-end process functionality.

User Acceptance Testing (UAT)

- UAT Preparation: Prepare test cases and scenarios for UAT.
- Conduct UAT: Engage end-users to test the automations in a controlled environment.
- Feedback and Refinement: Collect feedback and make necessary adjustments.

Deployment and Go-Live

- Final Preparations: Ensure all systems are ready for deployment.
- Go-Live: Deploy the automations to the production environment.
- Post-Go-Live Support: Provide support to address any issues that arise during the initial phase.

Continuous Improvement (Ongoing)

- Monitoring and Maintenance: Continuously monitor the application/s and perform regular maintenance.
- Optimisation: Identify opportunities for further optimisation and enhancement.

This plan provides a structured approach to implementing our platforms, ensuring that each phase is completed thoroughly before moving on to the next.

Deployment

Our platforms offer several deployment models, each with its own benefits. Our platforms can be deployed on virtualised servers and machines, and they support various deployment models, including cloud, on-premises and hybrid environments. We have described below each of the deployment models and the benefits of each:

Software as a Service (SaaS) Deployment Model:

- Flexible and scalable solution for organisations looking to implement applications without the need for extensive on-premise infrastructure.
- Eliminates the need for local installation and maintenance, allowing organisations to quickly deploy and scale their initiatives.

Benefits

- **Quick Deployment:** Faster deployment times as the infrastructure is managed by the service provider.
- **Automatic Updates:** Regular updates and patches are handled by the provider, ensuring the latest features and security enhancements are always available.
- **Reduced IT Burden:** Lower IT maintenance and management overhead, allowing internal teams to focus on strategic initiatives.

Our SaaS deployments are designed to provide high availability, which guarantees an uptime of 99.9%. We leverage cloud infrastructure to provide redundancy and failover capabilities, which helps in maintaining consistent uptime.

Our platforms SaaS deployments are designed with robust security measures, including ISO27001 and Cyber Essentials and holds certifications like ISO/IEC 27001, ISO/IEC 27017, and ISO/IEC 27018.

Our platforms provide robust business continuity and disaster recovery mechanisms for their SaaS deployments (see below for more details). We ensure business continuity by implementing comprehensive plans that include regular backups, redundancy, and failover capabilities. We have disaster recovery solutions in place to quickly restore services in case of a failure including active/passive and active/active configurations, to ensure quick recovery and minimal data loss in case of a failure. This includes automated processes to handle disruptions and maintain operational stability.

For SaaS deployments, we manage regular updates and patches by ensuring that all users receive the latest features, security enhancements, and bug fixes. Our platforms SaaS deployments are regularly updated and patched to address security vulnerabilities and ensure continued compatibility with other systems. Regular updates are released to address vulnerabilities and improve functionality and enhance compatibility. Our suppliers provide timely security patches to mitigate any identified vulnerabilities, ensuring the platform remains secure and reliable.

On-Premises Deployment Model:

Physical Servers: Platforms can be deployed on physical servers within your data centre, providing full control over the infrastructure.

Virtualised Servers: They can also be deployed on virtualised servers using technologies like VMware, Citrix XenDesktop, Microsoft Hyper-V, or other virtualisation platforms.

Benefits:

Control and Customisation: Full control over the infrastructure and environment, allowing for extensive customisation to meet specific business needs.

Data Security: Enhanced data security and compliance, as all data remains within the organisation's own data centres.

Integration: Easier integration with existing on-premises systems and applications.

Cloud Deployment Model:

Public Cloud: Platforms support deployment on public cloud platforms such as Microsoft Azure, Amazon AWS, Google Cloud Platform, IBM Cloud, and Oracle Cloud Infrastructure.

Benefits:

Scalability: Easily scalable to meet changing business demands without the need for significant upfront investment in hardware.

Cost Efficiency: Reduced capital expenditure as there is no need to purchase and maintain physical servers.

Accessibility: Access from anywhere, providing flexibility for remote teams and distributed workforces.

Hybrid Deployment Model:

Hybrid Deployment: Platforms can be deployed in a hybrid model, combining on-premises and cloud resources to meet specific business needs.

Benefits

Flexibility: Combines the benefits of both on-premises and cloud deployments, offering flexibility to choose the best environment for different workloads.

Optimised Performance: Ability to optimise performance by running critical applications on-premises while leveraging the cloud for scalability and cost efficiency.

Disaster Recovery: Enhanced disaster recovery options by utilising both on-premises and cloud resources.

Our platforms support on-premises deployments with highly available and multi-site configurations. Key features include:

High Availability (HA)

Redundancy: They can be deployed in a highly available configuration by duplicating all components to provide redundancy.

Active-Active and Active Passive Patterns: All components can be set up in active-active patterns, ensuring continuous availability. UIP supports active-passive configurations, ensuring continuous availability and disaster recovery.

Load Balancers: Load balancers are often used to manage network connections across multiple instances of the same component.

Multi-Site Configurations

Disaster Recovery: Platform supports multi-site configurations for disaster recovery, allowing for active-passive setups where components are replicated across different regions.

SQL Always on Availability Group: This feature can be used to share data across multiple environments, enhancing resilience.

These capabilities ensure that our platforms can meet your needs requiring robust, scalable, and resilient automation solutions.

Our platform technology will align to infrastructure blueprints and operate and integrate across different technologies.

Technical Requirements

The service is delivered as a cloud-hosted Software as a Service (SaaS) solution. Users access the service through secure, web-based interfaces and standard integration mechanisms.

Buyer-side requirements

- A supported modern web browser for project, portfolio and administrative user
- Secure internet connectivity for HTTPS access
- User accounts with appropriate role-based permissions
- Optional connectivity to finance, resource and reporting systems

Platform and compatibility

- Supports integration with financial management, resource planning and reporting tools
- Compatible with project, programme and portfolio management processes
- Supports standard APIs, middleware and file-based integrations
- Designed to operate within an integrated enterprise application environment

Security and access

- Secure authentication and encrypted data transmission
- Role-based access control supporting separation of project and portfolio roles
- Audit logging of project updates, approvals and changes
- No requirement for buyers to manage infrastructure or application servers

Project and portfolio management

- Supports project planning, scheduling and milestone tracking
- Portfolio-level visibility of progress, costs, risks and dependencies
- Management of approvals, issues and change control
- Reporting and dashboards for oversight and decision support

Scalability and operation

- Scales to support changes in project numbers and user volumes
- Platform updates, patches and maintenance managed by the supplier
- Service availability and performance monitored as part of standard operations

Information Security

ArvatoConnect relevant authorisations, certifications and accreditations

From our earliest engagement, we give clients the confidence that our solution adheres to the highest quality standards. We will do this through collaboration and participating in workshops to agree ways of working together using best practice, established quality frameworks and sharing all existing certifications as required.

ArvatoConnect currently has the following Certifications:

- PCI DSS
- ISO 9001:2015 - Quality Management
- ISO/IEC 27001:2022 - Information Security Management Systems
- BSI Customer Service Kitemark
- Cyber Essentials / Cyber Essentials Plus
- TISAX
- IT Health Check
- ISO/IEC 20000-1:2018 (Swansea Client based Only)

We are regulated by the FCA for our work with an automotive financial Services client, however, where we are certified or regulated in one client area only, we always apply the same principles across our entire business. We are currently working towards further certification in the following:

- ISO 14001:2015 - Environmental Management
- BSI Kitemark for Inclusive Service
- ISO/IEC 27017:2015 - Information Technology - Cloud Security
- ISO/IEC 42001:2023 - Information Technology - Artificial Intelligence

We maintain our certifications by executing regular audits and spot checks, annual employee training and regular communications, annual policy reviews to reflect on industry standards, threat monitoring via our Security Operations Centre, daily vulnerability scans across our assets, global IT Health Checks (ITHC), maintaining our quality management system with thorough documentation and record keeping, and robust incident management. We also fall under the FCA regulatory monitoring and therefore we monitor and report on all consumer duty customer outcomes

Business Continuity

ArvatoConnect will continue to deliver services in the event of a business continuity (BC) or disaster recovery (DR) incident by:

- ISO 22301 compliant and ISO 27001 aligned Business Continuity Management System
- Testing and reviews of BC Plans and Incident Response (IR) Plans
- Redundancy and resilience-centric IT and Operational solutions
- Dedicated teams and roles focused on service continuity

Our Business Continuity Management System, (BCMS) complies with ISO22301 and aligned to ISO27001 standards. It outlines the roles and responsibilities, operational framework (including communications), the relevant legislation and regulations. Our Head of Security Assurance & Resilience is responsible for our Business Continuity policy, guidance, templates, plans and adherence. We have comprehensive documented plans and procedures for restoring business operations after an BC or DR event, controlled through Business Continuity Plans (BCP) and Incident Response Plans (IRP). BCP and IRPs exist for each physical office, function/department and client account. This creates a plan unique to each client's operational and regulatory requirements.

The BCP outlines the plan for maintaining service continuity for our clients and it references all the interdependent information sources, to provide a step-by-step guide to restoring business operations. The IRP documents the procedure for escalation, assessment, initiation, coordination and communication of incident response. They provide a framework to support decision making and support the existing provision of Business Continuity Plans. It lists supporting documentation, communications and responsibilities. Together the plans identify all critical components of the service including communication contacts, network, system, data needed to restore operations, including backup requirements, as well as operational requirements and locations of supporting guidance such as opening hours and communications channels.

Both BC and IR plans are reviewed, tested and improved annually or more regularly if there are significant changes in the interim. The tests simulate conditions and validate the impact of potential business operation disruptions for all critical system, processes and services. This includes recovery of critical technology, evacuation drills, and resource mobilisation with restoration at alternate locations. We provide an organisation-wide SMS alert facility to keep colleagues fully informed if there is a significant incident or disruption in or around the workplace.

Solutions are designed with redundancy and resilience built-in, including:

Technical: non-availability of technology, computer, telephony and data solutions is offset by measures including software being cloud-based providing 24/7/365 access; spare hardware such as laptops are built and retained across our sites, ensuring rapid replacements are available at any time. We have preferred supplier agreements to procure equipment with reduced lead times, which we utilised during the Covid-19 Pandemic.

Physical: non-availability of premises is countered by maintaining multiple properties which can accommodate relocated roles. We also build in a critical mass of hybrid roles into each

operation so roles can work from home or other locations. Our offices have onsite generators with equipment hosted in local comms rooms protected by a UPS.

Personnel: non-availability of human resources is mitigated by cross-training colleagues, particularly those in central services, so they can step in at short notice to support. We ensure several roles in each contract can work from home and alternative locations. Where **enhanced** vetting is required, we ensure that certain central colleagues are pre-vetted.

Process: All knowledge management resources are cloud-based and therefore accessible anywhere, anytime, with the correct security credentials.

Suppliers: non-availability of a third-party supplier is managed by partnering with trusted suppliers that are experienced in equivalent BCDR requirements; undertaking comprehensive due diligence during supplier selection and flowing down contractual BCDR obligations.

Service Pricing

The Skills for the Information Age (SFIA) Definitions and rate card will be used to determine the project cost based on its agreed scope. The SFIA Definitions and rate card document is available within the pricing document section.

Terms and Conditions

Terms and Conditions have been attached separately.

Further Information

For further information about this or any of our G-Cloud services, please contact us as follows:

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