



G-Cloud 15 - Service Definition

Consultancy Services

January 2026

Version 1.0



IS 666067

Contents

SAGACITY OVERVIEW	3
VALUE PROPOSITION	4
WHAT THE SERVICE PROVIDES	5
OVERVIEW OF THE G-CLOUD SERVICE	6
KEY SERVICE CAPABILITIES	7
STRATEGIC ASSESSMENT AND PLANNING	7
DEBT MANAGEMENT.....	7
BILLING ASSURANCE AND REVENUE PROTECTION	8
CUSTOMER LIFETIME VALUE:	9
BUSINESS AND TECHNOLOGY TRANSFORMATION SERVICES.....	10
ASSOCIATED SERVICES	11
DATA PROTECTION.....	12
BUSINESS CONTINUITY STATEMENT/PLAN	14
PROVISION OF THE SERVICE	15
Resource Requirements	16
For Advisory and Assessment Engagements.....	16
For Platform Implementation Projects.....	16
For Analytics and Insight Services	16
OUR EXPERIENCE	18
SOCIAL VALUE	19
CONTACT DETAILS	20

Sagacity Overview

Founded in 2005 Sagacity is a customer centric business, supporting our clients and partners, helping them make informed decisions powered by the intelligent use of data. Sagacity believes that responsible data should be at the heart of every organisation, transforming their customer data, enabling them to identify and support their business and customer needs, underpinning operational efficiencies and the resultant cost savings.

As proud pioneers and early adopters of leading technologies, Sagacity utilises a number of platforms and programmes to continuously enhance and operate its solutions. Sagacity's appetite for continuous improvement has enabled us to deliver highly responsive, scalable, and flexible solutions for clients as well as providing your technical teams with invaluable support to embrace a more cloud-based infrastructure approach and adopt the rapidly evolving new technologies.

Alongside our consultative and technical expertise, we manage one of the largest datasets in the UK. Containing over 95m individual records, 30m properties and 300+ attributes allowing you to truly understand demographics, behaviours, specific localities or even the whole UK.

Sagacity helps organisations combine customer information with individual and property intelligence, turning insights into outcomes. Resulting in a hyper personalised and holistic view of customers, across the customer lifecycle:

On Boarding and Early Life:

- Building the **foundation** for **successful customer relationships**
- Understanding **customer affluence** and **vulnerability** to tailor appropriate tariffs, discounts payment options and service levels
- Ensuring you have full and **valid customer contact details**
- Creating **customer linkage** through data across disparate systems to **locate existing/duplicate accounts** and **verify customer identity**

In-Life Management:

- **Maximising value** and **engagement throughout the relationship**
- Understanding how to engage customers with **personalised communication preferences** and **channel optimisation**
- Eligibility & Appropriateness,
- Identifying **individuals or households** that are eligible for **discount due to their vulnerability**.
- Optimising **customer experience** by understanding **household composition** and **decision-making dynamics**

Debt and Collections:

- Delivering **intelligent intervention** that **preserves relationships**
- Understanding **propensity to pay** enabling **appropriate collection strategies** before debt escalates
- Identifying **vulnerability markers** ensuring **compliant** and **empathetic debt management**
- Optimising **payment arrangements** based on **customer financial capacity** and **historical behaviour patterns**
- **Recovering revenue** while **maintaining customer relationships** through **intelligence-driven approaches**

Sagacity is a purpose-led company and believes that purpose comes before profit. If the purpose is achieved, then everything else will follow. From a client perspective this means Sagacity engages to deliver successful client outcomes rather than limiting delivery to purely contracted outputs. Delivering outputs delivers the contract. Joining the dots delivers the outcome.

Value Proposition

Most public sector organisations work around poor-quality data rather than with it. When data is fixed, cleansed, integrated, and trusted, organisations recover millions in lost revenue, can manage their debt appropriately, eliminate operational waste, prove regulatory compliance through process rather than manual effort, and identify vulnerable people before situations become critical.

Public sector organisations commit to delivering value for money, achieving financial sustainability, meeting regulatory standards, and safeguarding vulnerable people. But fragmented, unreliable data makes these commitments impossible to deliver systematically.

Bodies within the public sector also face the challenge of disparate data sources, with each entity having its own set of records, sources & databases. Inter-departmental collaboration is then stifled by these technical constraints, as there is no single source of the truth to align one's goals against.

“For customers who suffer from poor financial, mental or physical well-being, the impact of an organisation failing to respond to personal needs and context is stark. Their average satisfaction of 45.4/100 is 37.4 points lower than similar customers who felt an organisation understood and responded to their personal needs. *Institute of Customer Service 2022 Customer Satisfaction Survey results

Our consultants have extensive experience helping organisations ensure they utilise their internal data insights and all appropriate 3rd party services to maximise the desired outcomes. Helping design, optimise and implement customer and resident data strategies, assessing data maturity, gap analysis to identify improvements for analytics capabilities, billing analysis and efficiencies, better risk profiling and debt management. Alongside operational improvements including cleansing, matching, normalising and deduplicating data for utilities, local government and housing association data transformation projects.

What the Service Provides

Expert consulting to design, implement, and optimise customer and resident data strategies for utilities, local government, housing organisations, etc.

Whether it's a council's commitment to "safeguard people from harm" and deliver "value for money services," a water company's obligation to support customers in vulnerable circumstances while ensuring "financial resilience," or a housing association's mission to provide "decent homes" and achieve "financial sustainability"—poor data prevents delivery.

Our consultants provides the expertise to diagnose what's wrong, design what's needed, and deliver solutions that work. Unlike pure strategy consultancies, we combine strategic guidance with hands-on operational insight and experience.

We help organisations:

- **Assess and plan** - Evaluate current data maturity, identify gaps undermining strategic priorities, and design practical improvement roadmaps
- **Fix data foundations** – Strategies for data transformation capabilities (cleansing, matching, normalising, deduplicating) to eliminate duplicate records, resolve conflicting information, and establish single customer views across siloed systems that multiple teams can trust and use
- **Enable predictive insight** - Configure lifecycle intelligence and analytics capabilities identifying payment risks, service demands, and vulnerability indicators before they materialise
- **Debt Management** – helping manage customers, improve debt recovery, prioritise collections activity, identify linked accounts, complete missing/incorrect contact details, etc. Segmenting customers for targeted debt management strategies across utilities, infrastructure and transport services, local government and housing
- **Propensity modelling** - Statistical technique that predicts customer behaviour so you can make informed decisions through outcome mapping. Experts in advanced machine learning and statistical modelling techniques for customer behaviour prediction. We tailor solutions using a range of models from simple logistic regression to complex ensemble methods, based on the specificity and scale of the problem
- **Billing Assurance and Revenue Protection** - Identify and recover revenue leakage through account holder verification, occupier identification, billing analysis and unbilled property detection for utilities and local authorities and housing. Access to Subject Matter Experts
- **Business and Technology Transformation Services** - Strategic consulting and delivery services for data and technology transformation programmes, including cloud migration, platform modernisation and AI implementation for public sector organisations

Overview of the G-Cloud Service

This consulting service provides expert strategic guidance and hands-on delivery capability, positioning Sagacity's consultants at the heart of data transformation programmes. Rather than providing recommendations alone, consultants design practical solutions to address specific organisational challenges.

With around 2.5 quintillion bytes of data created everyday, too few organisations are sufficiently prepared to manage, control and make use of it effectively. Identifying which data is important and what to do with it is crucial in achieving the right business and customer outcomes. Data is often stored across disparate systems along with inefficient onboarding processes and ineffective customer search capability, makes it difficult to maintain one unified view of a customer.

All our engagements provide tailored support based on an individual organisations specific challenges and objectives

The challenge of managing thousands of customers and their data can be difficult. Poor data quality can become engrained in an organisation and prevents successful engagement with the customer. To avoid poor service, companies must first know who their customers are, and data is fundamental to achieving this.

By gaining a true picture of your customer base, businesses can lower the level of unnecessary complaints – this means that customers have more accurate communications including billing and financial support where eligible. Our solutions provide significant benefits to enhance customer service:

- **Data Quality:** Address poor data quality which can lead to a negative customer experience, resulting in increased complaints
- **Business Assurance:** Delivers system and process improvements that enhance several business operations that reduce complaints
- **Customer Lifetime Value:** Companies understand who their most valuable customers are, and can invest in them, increasing customer satisfaction
- **Data Management:** A robust data management strategy enables a business to capture, manage and utilise customer data effectively
- **Credit Risk:** Enabling tailored treatment of customers based on the level of risk they pose, allowing for more personalised service
- **Business Transformation:** Delivering systems, processes and technologies to enhance the business that enable improved customer service

Key Service Capabilities

Strategic Assessment and Planning

Consultants evaluate current data maturity, identify specific gaps preventing delivery of strategic priorities, and design practical improvement roadmaps. This includes determining which data services and/or platform capabilities will deliver the greatest value, in what sequence, and with what resource requirements. Business cases quantify costs, benefits, and implementation timelines securing internal approval.

Benefits Delivered

- No matter the size of a customer base, organisations face **challenges with multiple records representing the same customer**, clogging databases and systems. A single golden view of customers is of paramount importance
- **Effective resident/consumer management.** Defining strategies for improving/implementing segmentation for personalisation and targeted communications. Create effective communication through use of demographics, lifestyles, and channel preferences. Ultimately to understand residents and their behaviour to support engagement
- Every organisation strives to **improve efficiencies and maximise use of their resources**, capabilities and assets. Being able to identify where there are areas of leakage in processes or in systems allows instances of cost or leakage to be found.
- **Avoid heavy fines, staying GDPR compliant ensuring data accuracy.** There is increased regulatory pressure for organisations to demonstrate good data standards and additional GDPR legislation on data management, both leading to large fines if not adhered to.
- **Reduce risk of brand and reputational damage.** Managing interactions and communications efficiently. E.g. not contacting wrong or deceased customers
- **Prioritise support where appropriate and identifying potential fraudulent customers**

Debt Management

Significant debt accumulating on final accounts as people move home leaving bills outstanding with limited forwarding information. Without robust credit risk and collections policies, debt can become substantial and collections activities expensive and ineffective

Our consultants and operational specialists have extensive expertise across the customer journey, from onboarding through to arrears management. As such, we helping organisations to manage their debt, improve debt recovery, prioritise collections activity, identify linked accounts, complete missing/incorrect contact details, etc. Segmenting customers for targeted debt management strategies across utilities, infrastructure and transport services, local government and housing.

Developing and supporting policies, processes, ways of working, risk and collections strategies.

Activities include;

- Defining policies and processes
- Managing policy compliance
- Optimising collection strategies and increasing collections performance
- Developing reporting and dashboards
- Implement tools and data to leverage risk management capabilities
- Scorecard analysis and segmentation based on third party and internal data
- Policy rules based on customer risk profiling. Alongside modelling for allocating credit limits, deposits and payment terms
- Operational compliance eg. credits, write offs, etc
- Assessing collections performance and effectiveness

Starting from an initial review of your capabilities, processes and tool sets, we evaluate your current performance to recommend a tailored solution to best suit your requirements.

Benefits Delivered

- Identify and remove benefits from ineligible residents, alongside identifying and prioritising support for those most in need
- Reduce bad debt and increase collection rates, minimising exposure to credit risk
- Improve forwarding information for Final accounts
- Appropriate, accurate, complete and validated consumer data. Improving customer experience, alongside tariff management, billing, payments, terms, etc
- Deep dive analytics and reporting of debt (including final accounts), together with root causes of debt and account issues
- Customer account segmentation by customer type (e.g. vulnerability, propensity to pay)
- Define and deliver targeted collections campaigns to contact residents with final account debt
- Final account process improvement recommendations. Confirmation of forwarding addresses to support collections campaigns

Billing Assurance and Revenue Protection

Few organisations use their data to identify how and where their margins are being eroded or their cash is lost in their normal operational activities. Even once it is known, there is no obvious approach to identifying which activities generate the revenue losses and margin reductions. Revenue Assurance is implemented by organisations to ensure that they collect the full revenue they are entitled to and minimise revenue leakage.

It involves identifying and preventing any potential issues or risks that could result in lost or inaccurate revenue. For example, identify and recover revenue leakage through bill/account holder verification, occupier identification, billing analysis and unbilled property detection for utilities and local authorities and housing.

Our consultants/subject matter experts help organisations rapidly and easily identify revenue and cost leakage in their processes or systems. Once changes are implemented and benefits are realised, extensive knowledge transfer is conducted

Benefits Delivered

- Identification of operational process efficiencies
- Identification of operational process efficiencies. Validating that a system, process or underlining data is inline with customer contracts and business expectation.
- Identify instances of service and consumption not billed or incorrectly billed. Improving discount and promotion compliance
- Highlight tariff and customer eligibility instances, which do not comply with billing and business rules
- Improved product/service customer compliance
- Billing accuracy to ensure services / products provided are accurately accounted for and billed
- Control mitigate risk of failure to comply with regulation sets by e.g. OFCOM, OFGEM, OFWAT, SOX, FCA, etc. Preventing investigation and potential fines
- Detailed analytics ensure high-quality investigations and findings enabling fact-based decisioning and fixes

Customer Lifetime Value:

There is so much data out there, almost too much, and organisations have most of it. However, it is not always being used to improve the business or unlock value. Therefore, organisations cannot identify those residents/customers that add the most value, those that erode value or understand what value means to the.

Our tailored customer value models are typically created at an aggregate level, whereas we design our solution from the bottom-up, ensuring data feeds are ingested at customer-level to enable drill-down into pockets of customers who create/destroy value alongside key business segments and customer demographics. Resultant models are robust and automatically adapt to new and changing environments such as new services and price points. Our experience has enabled us to develop multiple forecasting techniques to accurately predict a customer's future behaviour and performance.

We help organisations create a detailed measurement of individual customer value and delivers ongoing transparency on:

- **Value** - which trading areas of your business are profitable or not
- **Tenure** - how long a customer is likely to stay
- **Churn Propensity** - when a customer is expected to leave
- **Customer Investment** - the investment required to onboard a customer
- **In life Cost Management** - the investment required to retain a customer
- **The impact of specific commercial decisions and initiatives**

Breaks value down into all underlying components – tenure, cashflows, investment

Benefits Delivered

- Identification of customers segments which are adding/eroding value
- Ability to feed into existing operational processes on customer level
- Individual customer level profitability
- Detailed understanding of the key value drivers of cost of profitable revenue at an individual customer level
- Ability to compare individual customer performance against others with similar profiles
- Ability to model how potential changes cost and revenue drivers impact profitability
- Ability to automatically monitor changes made as a result of the insights provided
- Interactive dashboards for easy comparisons across customers, services, locations, etc

Business and Technology Transformation Services

Strategic consulting and delivery services for data and technology transformation programmes, including cloud migration, platform modernisation and AI implementation for public sector organisations. We can help you fully plan the implementation of system changes, engaging the right stakeholders and map out an end-to-end plan. Re-defining ways of working for you to smoothly and easily adopt the resultant system/change.

Benefits Delivered

- Strategic alignment between the organisation's vision and the company structure
- Clear and defined accountability across operations and business functions which results in a more efficient and focussed execution of strategy
- Defined span of control, with clarity of accountability
- Deliver transformation and increased performance
- Timely, insightful and actionable outcomes
- Improve data usability
- Improved analytics Capability
- Structured and designed organisational growth, rather than driven by circumstance
- Improved staff retention with clear career progression paths

Associated Services

This consulting service can be combined with complementary Sagacity solutions available through G-Cloud 15 to provide end-to-end data capability:

- **Data Quality and Enrichment Services** Ongoing data cleansing, validation, matching, and enrichment to maintain and improve data quality over time. Available as managed service or integrated capability.
- **Customer Insights and Analytics Services** Predictive modelling, customer segmentation, and lifecycle analytics delivered as managed analytics capability or embedded analytical solutions.
- **Data Integration and Master Data Management** Technical solutions for connecting disparate systems, building data pipelines, and creating single customer views across the organisation.
- **Debt Management and Collections Optimisation** Data-driven services to improve debt recovery, prioritise collections activity, and segment customers for targeted strategies.
- **Revenue Protection and Billing Assurance** Solutions to identify revenue leakage, verify account holders, detect unbilled properties, and analyse billing accuracy.
- **Business and Technology Transformation Services** Strategic and delivery support for wider transformation programmes including cloud migration, platform modernisation, and AI implementation.
- **Customer Data Platform for Public Services** Cloud-based platform providing unified data management, analytics, and visualisation capabilities across customer and resident data.
- **Integration and Support** All services include standard integration support, documentation, knowledge transfer, and post-implementation support. Training can be provided for internal teams to maintain and operate solutions independently. Updates and enhancements are included within service agreements, with upgrade paths clearly defined at contract inception.

Data Protection

Professional/Trade Bodies:

- ICO, DMA, and BSI

Security accreditations / certifications:

- Security controls designed to align with internationally recognised standards such as ISO/IEC 27001. Under ISO/IEC 27001, we have implemented to over 96 security controls that we are audited on an annual basis to facilitate a robust information security framework. We are ISO27001- 2022 certified- Expiry 04/10/2026.
- We hold Cyber essentials- Expiry 06/02/2026
- We hold Cyber essentials Plus- Expiry 11/03/2026.

Processes and facilities for safely managing information:

- **Data Protection:** All data in transit uses TLS 1.2 or higher and Data at rest is encrypted to a AES256 Bit standard. Backups are also encrypted to a AES256 Bit standard.
- **Secure Development Practices:** Secure SDLC, code reviews, automated testing, and vulnerability scanning.
- **Vulnerability Management:** Regular vulnerability scanning and security testing. Patch management processes to remediate identified vulnerabilities in a timely manner.
- **Data Segregation** Logical separation of client data across projects and environments. Client data accessed strictly on a need-to-know basis.
- **Data Minimisation** Only data strictly required for delivery of consulting services is accessed or processed. Preference for anonymised, pseudonymised, or masked data where feasible.
- **Clear Screen and Clear Desk policy**

Data Back-Up and Restoration:

- All information deemed valuable by Sagacity must be stored securely to ensure its availability and integrity are preserved. The information should be stored redundantly, thus ensuring that individual systems or media failures do not render it inaccessible whilst also ensuring that its confidentiality requirements are met.
- All critical data and systems must be backed up to provide for recovery of these systems in the event of a business continuity event such as system failure.
- Procedures for the backup, restore, and recovery processes must be documented, and copies stored securely off-site, thus available if normal access is not possible.
- Frequency, method and retention of backups are determined by the value of the content and criticality to business operations. Either a backup, snapshot or version made of the data or service either on an automated daily basis or manually whenever a change is made.
- Backups must be stored redundantly, i.e. in more than one physical location/system other than the original source, aligned with the Encryption Policy.
- Retention of backups must be stored for at least a month for high-critical services or a week for medium and low-critical services unless overwritten by a superseding version. If there are bespoke or exclusions to this policy, then these should be documented.

Retention:

- All client data is subject to the retention policy as set out in the Client Contract and/or Statements of Works which takes precedence over any other policy. Should the retention periods not be defined by the client, the entirety of personal client data being processed will be properly disposed of **within 30 days** of the project being accepted by the client and deemed as complete and/or closed.
- Should an organisation using Sagacity resources request that data be kept for any given reason, the request must be recorded, and that agreement must take precedence over our standard 90-day retention.

Review and Disposal:

- Client data locations are reviewed every quarter by the IT and Security Team as part of the Access Reviews.
- To facilitate the deletion process, a Service Request is raised by the Data Controller or Project Manager.
- A Data Deletion Certificate is then created and shared with relevant people to confirm the data deletion.

To safeguard sensitive information and prevent unauthorised data loss, a Data Loss Prevention (DLP) strategy has been implemented. This strategy includes a variety of controls designed to monitor and protect data flows across different channels. Key controls include:

- Email Monitoring: Scanning all outgoing and incoming emails for sensitive information, ensuring that confidential data is not inadvertently or maliciously transmitted outside the organisation.
- File Transfer Monitoring: Monitoring of file transfers within our network and to external destinations to detect and prevent unauthorised transfers of sensitive files, maintaining the integrity and security of our data.
- Portable Storage Device Tracking: To mitigate risks associated with portable storage devices, we prevent data copied to and from devices such as USB drives and external hard drives.
- Continuous Observation: Our DLP solutions are used to continuously observe data flow and detect potential leakage points, ensuring real-time protection against data loss.
- Access Restrictions: Enforce strict access controls to limit who can view or transfer sensitive data, adhering to the principle of least privilege.
- Encryption: Ensure sensitive data is encrypted both in transit and at rest to prevent unauthorised access and protect data integrity.
- Data Masking: Use data masking techniques mentioned above to obscure sensitive information in non-production environments, preventing exposure during development and testing activities.
- Device Restrictions: Only Sagacity Registered Devices can log in and access resources, mobile devices have additional restrictions in place where copy, screenshot and other functionality is removed.

Business continuity statement/plan

Scope of plan: The purpose of the Business continuity plan is to prepare Sagacity in the event of any unknown incidents that could impact the business, such as quarantines, pandemics, office unavailability, unlawful access, extended service outages, and disruptions caused by external factors beyond its control.

The Business Continuity Policy, along with the adjoining Incident Management Policy & Procedure, clearly defines the steps required to be taken to restore services for our customers to an acceptable level within the shortest timeframe possible and to ensure the safety of our resources in the event of an incident occurring.

All services and products offered by Sagacity are included within the scope of the Business Continuity and Incident Management Policies. Incidents that lead to our Business Continuity Playbook being invoked will usually fall into one of the following categories:

Type Incident	Examples
Premise	A premises incident can include a flood, fire, burglary, or any other disaster that renders any one or more of our offices inaccessible. Premises incidents also cover any issues with Sagacity's building infrastructure where electricity, plumbing, heating, broadband, or any other utility has malfunctioned to such an extent that business cannot be conducted as normal.
Unlawful Access	An unlawful access incident is where a malicious threat has materialised which may lead to the destruction, loss, alteration, or unauthorised disclosure of or access to personal and sensitive information (PII).
System Malfunction	A system malfunction incident will include any incident relating to Sagacity's computer systems (e.g. AWS applications/services), with the exclusion of a malicious attack, that may lead to/has disrupted normal services being carried out.
Human Resources	Any incident affecting employees of Sagacity Solutions, for example, any mass illness that can potentially result in a reduced workforce. An HR incident can include an epidemic, pandemic, or an outbreak of any infectious disease that could affect the daily operations of the offices.

Please see the outlined below the Incident Management Process:

- **Phase 1:** Incident Identification and Reporting – Applicable to all users.
- **Phase 2:** Incident Evaluation and Analysis – Applicable to the Information Security Team
- **Phase 3:** Incident Resolution – Applicable to relevant teams and the Information Security Team. Further details below, along with examples of both short-term containment controls and long-term eradication activities.
- **Phase 4:** Return to BAU – Applicable to relevant teams and the Information Security Team.

Provision of the service

Customer Responsibilities

To ensure successful delivery, organisations typically provide:

Access and Engagement

- Access to relevant systems, data, and documentation required for assessment and implementation
- Availability of key stakeholders for requirements gathering, workshops, and decision-making
- Designated project sponsor with authority to approve recommendations and allocate resources
- Suitable working environment for consultants (office space for on-site work or remote access as agreed)

Information and Approvals

- Clear objectives and success criteria for the engagement established at outset
- Timely feedback and approval of deliverables at agreed project milestones
- Notification of changes to scope, timelines, priorities, or business context affecting delivery
- Necessary security clearances, compliance approvals, and access permissions for Sagacity personnel

Data and Resources

- Data extracts in agreed formats and timeframes for analysis and configuration work
- Compliance with data sharing agreements and information governance requirements
- Secure environments for handling sensitive data during consulting engagements
- Internal resource allocation as defined in the Order Form (SME time, testing support, etc.)

Post-Implementation

- Commitment to capability building activities including training attendance and knowledge transfer
- Internal resources to operate and maintain deployed platform capabilities after transition
- Ongoing data governance practices to sustain improvements beyond consulting engagement

Technical Requirements and Client-Side Requirements

For Data Analysis and Platform Configuration

- Ability to provide data extracts in standard formats (CSV, Excel, SQL extracts) or secure access to source systems

Resource Requirements

Specific requirements vary by engagement but typically include:

- Project sponsor (senior stakeholder) - 2-4 hours per week
- Subject matter experts (operational staff) - 4-8 hours per week during requirements and testing phases
- Technical resources (IT staff) - 2-4 hours per week for integration and access provisioning
- End users - availability for training and user acceptance testing

Detailed resource requirements are agreed during engagement planning and documented in the Order Form.

Outcomes/Deliverables

For Advisory and Assessment Engagements

- Current state assessment documenting data quality, governance maturity, integration challenges, and capability gaps with quantified impact on operations
- Data strategy and improvement roadmap with prioritised recommendations, sequenced initiatives, and resource requirements
- Platform capability selection identifying which modules address priority needs and deliver greatest value
- Business case development including cost-benefit analysis, implementation timelines, and ROI projections
- Feasibility studies for proposed platform deployments or technology integrations

For Platform Implementation Projects

- Detailed project plans with milestones, dependencies, resource requirements, and delivery timelines
- Configured platform modules ready for operational use - data transformation capabilities processing live data, lifecycle intelligence generating actionable insight, activation tools enabling intervention
- Technical integration connecting platform modules to existing systems with documented interfaces
- Cleansed and migrated data meeting agreed quality standards and loaded into platform or target systems
- Testing documentation and user acceptance support ensuring solutions meet requirements
- Training materials and knowledge transfer sessions equipping internal teams to operate independently

For Analytics and Insight Services

- Predictive models with documentation on methodology, accuracy metrics, and operational application
- Customer segmentation schemes with profiling, targeting recommendations, and integration into workflows
- Interactive dashboards and visualisation providing drill-down capabilities and actionable insight

- Regular insight reports with findings, recommendations, and evidence of business impact
- Performance metrics and monitoring frameworks tracking outcomes against objectives

Measurable Outcomes

Engagements deliver measurable value through:

Financial Impact - Revenue protection identifying billing errors, unbilled properties, and payment risks before loss occurs. Improved debt recovery through targeted intervention based on ability to pay. Quantified savings from eliminated duplicate processes and manual workarounds.

Operational Efficiency - Reduced time on data cleansing, reconciliation, and manual processes. Faster decision-making with reliable data available at point of need through platform capabilities. Capacity freed from firefighting to focus on strategic priorities.

Compliance and Risk Reduction - Improved data quality scores meeting regulatory standards. Reduced compliance issues with evidence readily available through platform reporting. Fewer billing errors and customer complaints through systematic processes enabled by platform capabilities.

Service Improvements - Earlier identification of customers requiring support through lifecycle intelligence. Higher satisfaction through proactive intervention enabled by alerts and monitoring. Better outcomes through targeted resource allocation using segmentation and analytics.

Capability Building - Upskilled teams able to operate platform modules independently. Embedded data governance sustaining quality over time. Reduced dependency on external support through knowledge transfer and self-service access where appropriate.

Success metrics are established at engagement start, tracked throughout delivery, and validated at completion.

Termination Process

The associated service will remain until terminated by either Party on no less than 60 days written notice to the other Party. The Customer will also be able to terminate this Support Maintenance SOW at any time if Sagacity continuously fails to achieve the agreed SLAs, provided that Customer and Supplier cannot agree to a mutually agreeable rectification.

Our Experience

Case Studies

Utility & Water Company

Sagacity performed a large scale segmentation exercise on the whole of a water provider's base, to allow them to carry out debt and marketing operations more efficiently, saving money and increasing potential returns.

This included a regression analysis to identify the shared attributes across different types of customers, to identify which variables were the most indicative of the behaviours we were trying to predict/identify.

The segmentation process followed these steps:

- Achieved by initially taking a subset of the water provider's base, those they deemed as "good" and those deemed as "bad" with surrounding debt and product information.
- Taking the two groups of individuals and matched those to the Enhance enrichment base, using Forename, Surname & address as the main identifiers.
- Once matched, appending over 100 attributes to each individual, giving a full holistic picture of their respective characteristics, such as Household affluence, Vulnerability or Communication preferences
- This created the base to work from, next performing regression analysis, identifying which characteristics were prevalent in each group, identifying the most predictive attributes
- Matching the whole water provider's base to Enhance following the above steps, and then utilising the previous learnings to score each individual on the likelihood of being "good" or "bad" based on the characteristics they held

Once this was completed, Sagacity produced a web-based dashboard on the water provider's customer base, showing the segmentation by Enhance variables, the predictive scoring and other relevant metrics requested. Alongside this a final report was generated, detailing all findings, insights and opportunities that arose from the segmentation and analysis.

Client Summary

A trusted partner for over 350 brands.



Social Value

Kickstart Economic Growth

At Sagacity, we consistently spend a proportion of our annual revenue on research and development, looking to develop new technology and methodologies which can be shared within the market, to improve service offerings across the industries we operate in.

Each year we also hire a host of interns and graduate students, for their work experience or first jobs respectively, investing in this country's future by providing them with both the technical & soft skills they need to succeed in the world of work. This is also combined with the training opportunities provided to current staff, allowing them to upskill and progress in their careers.

Make Britain a clean energy superpower

In a bid to help Britain achieve net-zero, when we look at our infrastructure providers we heavily take into account those making decarbonisation their priority, as well as supporting our building provider to continue making efficiency improvements within the spaces we work.

Sagacity is a paperless business and requests that emails are only printed if they really need to be. In addition, old and unused IT equipment is recycled and donated to charity instead of being disposed of. We want to help make Britain a clean energy leader, not just a consumer.

Break down barriers to opportunity

Sagacity is committed to promoting equality, diversity and a culture that actively values & recognises the differences between backgrounds, cultures and the valuable experiences and insights that this offers to the workplace.

Sagacity has an Equal Opportunities policy with the aim of managing diversity successfully to help the company nurture creativity and innovation, growth, and improved competitiveness.

Sagacity also help provide vulnerability models – financial, health & general to business to help them ensure they are prioritising those that need to be and making sure that opportunities provided are equally split between those that need it.

Build an NHS fit for the future

Sagacity look to share the health metrics we hold at local levels, free to governmental bodies. Enabling them to make better decisions for their constituents and highlight those that need extra help, again reducing the burden the NHS faces and improving efficiency of council health operations.

Also as an employee benefit, Sagacity offers the Healthshield service which enables all employees access to health treatments and guidance across their tenure. This supports employees being in the best health they can possibly be, reducing both the current & future burden the NHS may experience.

Tackling Economic Inequality

Sagacity provide vulnerability models to help clients better provide and cater for their vulnerable customers, especially those who are marked as economically vulnerable, allowing for fairer services to be provided. Data is available at a local level on health and well-being.

Improving Energy Efficiency

Our property data allows clients to evaluate the carbon footprints of households and businesses whilst also providing advice on how to support energy efficiency.

Sagacity aims to offer an inclusive environment in which diversity is valued and used in a respectful way to create an effective and efficient workplace and recruit and retain a diverse workforce that reflects the community that we serve. Sagacity also aims to ensure that all employees have the opportunity to maximise their potential and enhance their self-development and their contribution to the business.

Contact Details

Please send your requirements enquiries@sagacitysolutions.co.uk . Alternatively, if you wish to discuss your requirements in more detail, please call us on 020 7089 6400 or send us the following information and we will be happy to contact you:

1. Your organisation name
2. The name of this service
3. Your name and contact details
4. A brief description of your business situation
5. Your preferred timescales for starting the work