



Dufrain

THE DATA & AI COMPANY

Service Definition Document

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1. Introduction



Company overview - our story

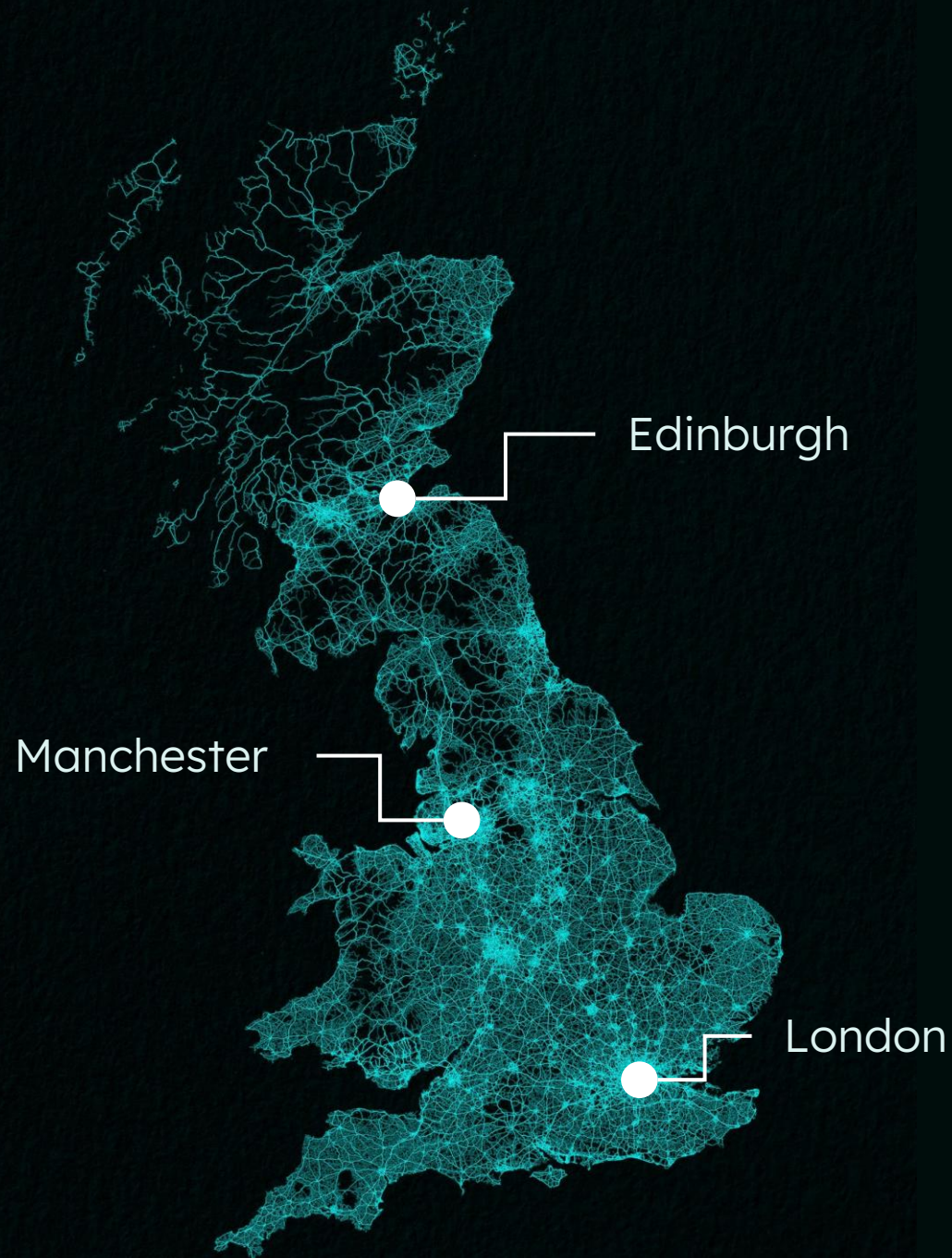
Established in 2010 focused on Data Management & Analytics.

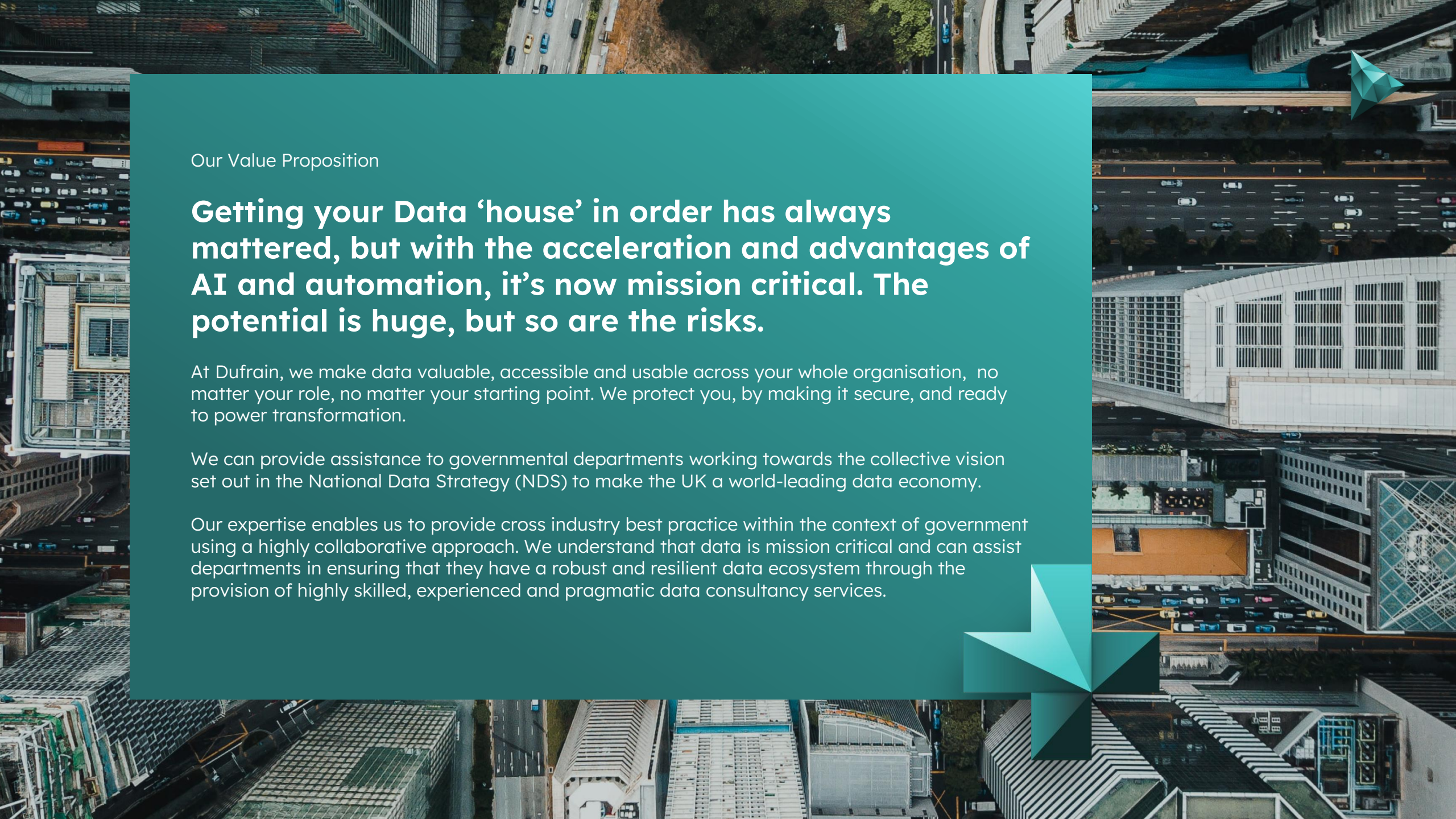
Today, Private Equity backed and one of the UK's largest and leading pure play data consultancies.

X-Sector Expertise with 100+ Data Consultants across 3 UK Centres of Excellence with Offshore Extensions (Kerala, India).

Specialising in **modernising** analytics, BI and **transforming** businesses and departments to modern data architecture principles to enable & unlock the value of **AI and Gen AI**.

Extensive Client Base in **FTSE 100 / 250 organisations and Central and Local Government**



An aerial photograph of a city, likely London, showing a mix of modern and older buildings, roads with cars, and green spaces. A large teal rectangular overlay is positioned on the left side of the image, containing white text. In the top right corner of the teal area, there is a small teal geometric shape resembling a stylized arrow or a small pyramid. In the bottom right corner of the teal area, there is a larger teal geometric shape resembling a stylized star or a cluster of triangles.

Our Value Proposition

Getting your Data ‘house’ in order has always mattered, but with the acceleration and advantages of AI and automation, it’s now mission critical. The potential is huge, but so are the risks.

At Dufrain, we make data valuable, accessible and usable across your whole organisation, no matter your role, no matter your starting point. We protect you, by making it secure, and ready to power transformation.

We can provide assistance to governmental departments working towards the collective vision set out in the National Data Strategy (NDS) to make the UK a world-leading data economy.

Our expertise enables us to provide cross industry best practice within the context of government using a highly collaborative approach. We understand that data is mission critical and can assist departments in ensuring that they have a robust and resilient data ecosystem through the provision of highly skilled, experienced and pragmatic data consultancy services.

What our service provides



Dufrain provides end-to-end data consultancy, from advisory services to define your data strategy and architecture through to technical delivery of data systems and services. Our expertise spans platform across data foundations, data products and data and AI services, with specialists in all major data technologies and trusted partnerships with Microsoft, AWS, Google Cloud, SAS and Databricks.

Our 4 step approach: built for impact, not just ideas



Our social value and statement on social responsibility



Social Value

We strive to build sustainable, equitable, healthy, and diverse communities through a combination of innovative business practices and exemplary Environmental, Social and Governance (ESG) performance.

This commitment informs every aspect of our business, including how we design and build new projects, operate our company, collaborate with stakeholders, and report progress. Our ESG Policy sets out our approach to sustainability matters. At the heart of the Policy is a corporate culture that has sustainability at the core of all our business operations and values.

Statement on social responsibility

Our focus is to deepen relationships with our key stakeholders by investing in our employees and partnering with our customers, communities, investors, and suppliers.

- We are committed to engage with our employees to provide a challenging, dynamic, inclusive, and diverse work environment that supports flexible working and their professional development, as well as promoting a good work-life balance that prioritises their overall health and wellness.
- We will support initiatives that benefit the environment, human welfare, and education. This includes skills training that advance workforce talent pipelines for our customers and economic development in the communities in which we operate.
- We will engage suppliers, customers and employees in safety, health, and wellness.
- We will preserve and promote the protection of human rights and welfare within our own business activities, as well as those of our supply chain, in accordance with our Human Rights Policy, Code of Ethics and Business Conduct, Supplier Code of Conduct, and the Modern Slavery and Human Trafficking Policy.
- Our ESG commitments are complemented by our CSR initiative. All of our consultants are given 1 day a year to take part in activities that benefit the communities where we work. These initiatives are very often done with our clients, so that they not only provide a positive contribution to our community, but also act as a team bonding exercise to further enhance our client partnerships and one team culture.

Social Value

1: Kickstart Economic Growth



Dufrain supports economic growth by creating an inclusive workplace where people can develop and succeed. We recognise that accessible employment and fair opportunity drive productivity, innovation and long-term prosperity. Our culture promotes work-life balance, professional development and an environment that supports wellbeing and high-quality work.



We also recognise ongoing inequalities in employment. We aim to involve people from protected characteristics and varied socioeconomic backgrounds to widen access to opportunity. Our commitments are noted below:

- We will continue to use inclusive, flexible and accessible recruitment practices,(e.g. inclusion, focused processes, skills-based assessments, structured interviews and transparent promotion pathways).ADR pipeline redesign and automation
- We will continue to work with training and reskilling partners to support recruitment from diverse backgrounds. These actions will help build a more skilled workforce, fairer employment pathways and the wider economic growth that comes from a diverse, empowered talent pool.
- We will conduct regular skills analysis across Dufrain's workforce and the contract workforce to understand needs for additional training or certification.
- We will continue to support hybrid working to widen participation and improve access to employment for diverse group
- We will continue regular DSE assessments, catering for reasonable adjustments and working with Access to Work where further support is needed.
- We will continue to adhere to our documented escalation and whistleblowing processes.
- We will collect employee demographic data to benchmark improvements.
- We will create programmes to support people entering consulting for the first time.

Social Value

2: Make Britain a Clean Energy Superpower



Dufrain is committed to reducing energy use and carbon impact, recognising that meaningful climate action supports the ambition to make Britain a clean energy superpower. Our sustainability work continues to focus on responsible initiatives that deliver efficiency, value and health benefits for our people, clients and communities.



We continue encourage customers to reduce their environmental impact by promoting digital-first working and more sustainable materials. We will support a paper-free culture, help clients avoid printing and embed greener practices. We continue to comply with environmental legislation and continually work to minimise our operational impact. We support the recommendations of the UK Joint Government and Regulator Taskforce (TCFD) and encourage enhanced disclosure on climate change, biodiversity and the SDGs, aligned with wider goals such as the Paris Agreement.

- We will encourage digital-first engagement and reduced print usage.
- We comply with environmental legislation and adopting practices that minimise impact.
- We will Support TCFD recommendations and stakeholder engagement on climate disclosures

Dufrain will continue to apply the ‘best practicable environmental option’ in waste management, prioritising reduction, reuse, recycling and recovery over landfill. We recognise our responsibilities under Environmental Protection legislation and the Duty of Care for waste handling. We expect all staff and supply chain partners to comply with this policy and our Environmental Guidance Notes (EGNs), ensuring responsible waste management and maximised reuse. These commitments support national priorities for cleaner growth, reduced emissions and improved environmental stewardship.

Social Value

3: Break Down Barriers to Opportunity



Dufrain promotes equality, diversity, inclusion and allyship across our workforce, customers, partners and third parties. We will maintain a discrimination-free environment where everyone is treated fairly and has access to opportunity regardless of age, disability, gender reassignment, marriage or civil partnership, pregnancy or maternity, race, religion or belief, sex, sexual orientation or part-time arrangements. This commitment helps break down barriers so everyone can thrive.

- We will continue the use of inclusive, flexible and accessible recruitment practices (e.g. skills based assessments, structured interviews and transparent promotion processes). We differentiate only on merit and ability to perform in the role.
- We will work with training partners to support recruitment from diverse backgrounds, including women in Data and other underrepresented groups.
- We will conduct regular skills analysis across Dufrain's workforce and the contract workforce to identify needs for additional training or certification.
- We continue to ensure decisions on recruitment, training, performance reviews, promotion, pay and rewards are based on objective criteria linked to performance.
- We continue to promote dignity and respect at work. Mandatory Kallidus training covers preventing sexual harassment, bullying and harassment, Equality, Diversity, Equity and Inclusion and Menopause awareness.
- We will continue to raise awareness of egalitarian issues such as International Women's Day through webinars, blogs communications and internal communities.

Our approach will support equitable access to skills, fair progression and the removal of barriers that may limit participation. By embedding these principles and reviewing our practices regularly, we help create a more inclusive sector.

Social Value

4: Build an NHS Fit for the Future



Dufrain recognises the importance of wellbeing in building a resilient workforce and healthier communities. By continuing to support our people and creating a workplace where wellbeing is prioritised, we align with national ambitions to build an NHS fit for the future through early support, healthier working lives and reduced avoidable pressures.

- We continue to offer hybrid working options that account for varied preferences and personal circumstances.
- We will hold regular reviews of processes and policies to ensure appropriate support, including using Access to Work and making adjustments for short- or long-term wellbeing needs.
- We will continue to host wellbeing talks, events and gift packages, supported by wellbeing-focused communication channels and both remote and in-person social events.
- We will provide the provision of flu jabs, an employee counselling programme, private healthcare benefits, family access to a 24/7 virtual GP service and discounted gym memberships.
- We continue to offer training for employees and managers on creating positive wellbeing cultures .
- We will partner with local charities to support employees with issues such as fertility and miscarriage. Our focus on proactive wellbeing encourages early intervention, reduces health inequalities and helps maintain a healthier working environment.
- We will give access to an employee forum for raising anonymous concerns or questions.
- We will continue DSE assessments.
- We will provide inclusive talent attraction and selection practices to help maintain a diverse and supported workforce.

Overview of G-Cloud Service

Dufrain capabilities	Strategy & Transformation					
	Our strategy and transformation office is there to help our clients understand the need for change before a client makes the investment. Whether this is a helping create a Data Strategy, AI Adoption readiness, Business Value Analysis or develop a Proof of Value. We also help manage and execute any resulting transformation with programme, project and change support.					
	Data Foundations		Data Services		Data Products	
	We help clients understand the architectures required to help unlock the value of data and migrate away from legacy infrastructures to modern data architectures and platforms. We help bring strong data management and governance principles to modern architectures		We help clients gain a holistic view of their business. We leverage data science and AI to help with predictive, prescriptive, descriptive and diagnostic challenges.		We help our client put data and AI at the heart of their digital products whether they are internal or external facing apps	
	Data Architecture	Data Engineering	Data Governance	BI & Real-Time Analytics	Data Science & AI	Intelligence Applications
Vertical experience	Insurance					
	Banking / Cap Markets					
	Retail/Professional Services					
	Other					

Summary of Databricks' Unity Catalog Implementation & Data Governance Consulting



Associated Services

Maximise your Databricks investment with Dufrain's expertise in Unity Catalog migrations. Unlock enterprise-grade governance, security, and compliance while future-proofing your data strategy.

Our proven, seamless approach empowers you to scale confidently and deliver best-in-class data products, transforming your platform into a powerhouse for innovation and growth.



Features

- ▶ Strategic Unity Catalog delivery, departmental alignment, business-outcome governance
- ▶ Automated Databricks optimisation, Unity Catalog governance, managed asset performance
- ▶ Fine-grained security enforcement, catalog-to-row controls, compliant data access
- ▶ End-to-end data lineage, impact analysis visibility, compliance traceability
- ▶ Secure cross-workspace sharing, governed access controls, centralised data distribution
- ▶ Built-in auditing, access activity logging, compliance-ready data traceability
- ▶ Business metadata tagging, dataset classification, governance-driven data discovery
- ▶ Unity Catalog strategy, governed implementation, value-driven Databricks adoption
- ▶ Structured enablement programs, governance-led onboarding, value-driven user training
- ▶ Ongoing expert advisory, proactive governance oversight, continuous Unity Catalog optimisation



Benefits

- ▶ Drive lasting success with tailored strategies that amplify business impact
- ▶ Unity Catalog enables automatic optimisations for all managed entities
- ▶ Ensure security compliance from catalog to entity's column / row
- ▶ Visualise end-to-end lineage for compliance and impact analysis
- ▶ Share data securely across multiple Databricks workspaces
- ▶ Track who accessed what data and when for compliance
- ▶ Apply business tags for easier discovery and governance
- ▶ Unity Catalog strategy, governed implementation, value-driven Databricks adoption
- ▶ Boost engagement through tailored onboarding, governance, and training delivering value.
- ▶ Ensure Unity Catalog and governance excellence through proactive oversight



An aerial photograph of a dense, green forest. A light-colored, winding road or path cuts through the trees, starting from the bottom left and curving towards the top right. The trees are mostly coniferous, with varying shades of green. In the top right corner, there is a small, teal-colored geometric logo resembling a stylized pyramid or a cluster of triangles.

2. Data Protection

Information Assurance

Commitment to Data Protection and Security

The company is committed to the lawful and correct treatment of personal information, adhering to the principles of the UK Data Protection Act 2018 and the General Data Protection Regulation (GDPR). All personal data is processed fairly, lawfully, and transparently, collected for specific and legitimate purposes, and kept accurate and up to date. Data is not retained longer than necessary and is protected against unauthorised or unlawful processing, accidental loss, destruction, or damage through appropriate technical and organisational measures.

Employee Responsibilities and Training

All employees are made aware of their roles and responsibilities regarding data protection. They receive training on confidentiality, data protection, and the actions to take upon identifying a potential data breach. Employees with specific data protection responsibilities are appropriately trained.

Data Security Measures

- Hard copy personal information is kept in locked storage.
- Confidential information is only accessible to those with a legitimate need.
- Electronic data is coded, encrypted, or password protected on both local and network drives, which are regularly backed up.
- Removable storage media must be kept secure and encrypted.
- Passwords must not be shared, and personal data should not be stored on portable devices without authorisation and encryption.
- Failure to follow data security rules may result in disciplinary action, including dismissal.

Data Back-Up and Restoration

Back-Up Practices

The policy specifies that computerised data must be stored on network drives that are regularly backed up. This ensures that, in the event of accidental loss or damage, data can be restored from secure backups. Removable storage devices are only to be used when necessary and must be encrypted and securely stored.

Restoration and Recovery

While the policy does not detail restoration procedures, the emphasis on regular back-ups and secure storage implies that restoration processes are in place to recover data as needed, minimising the risk of data loss.



Business continuity statement/plan



Business Continuity

Dufrain have a fully resilient business continuity plan and are able to provide core services through a myriad of business impacting scenarios. The plan is audited aligned to the ISO27001 framework, reviewed quarterly by the senior management team and initiated annually to test efficiency and effectiveness.

The functional areas of our business have robust, well defined management plans in place to ensure that there is resilience across people, processes and technology and mitigations against specific threats to operations. A more detailed plan can be provided to the buyer on request.



Privacy by Design

Principles and Implementation

The company fully endorses and adheres to the principles of privacy by design, as required by the UK Data Protection Act 2018 and GDPR. This includes:

- Collecting only the data necessary for specified purposes.
- Ensuring data is processed securely and confidentially.
- Limiting access to personal data to those who need it for legitimate business purposes.
- Regularly reviewing and updating data protection systems and processes.
- Assigning lawful bases for all processing activities and seeking consent where appropriate, ensuring it is freely given, specific, informed, and unambiguous.

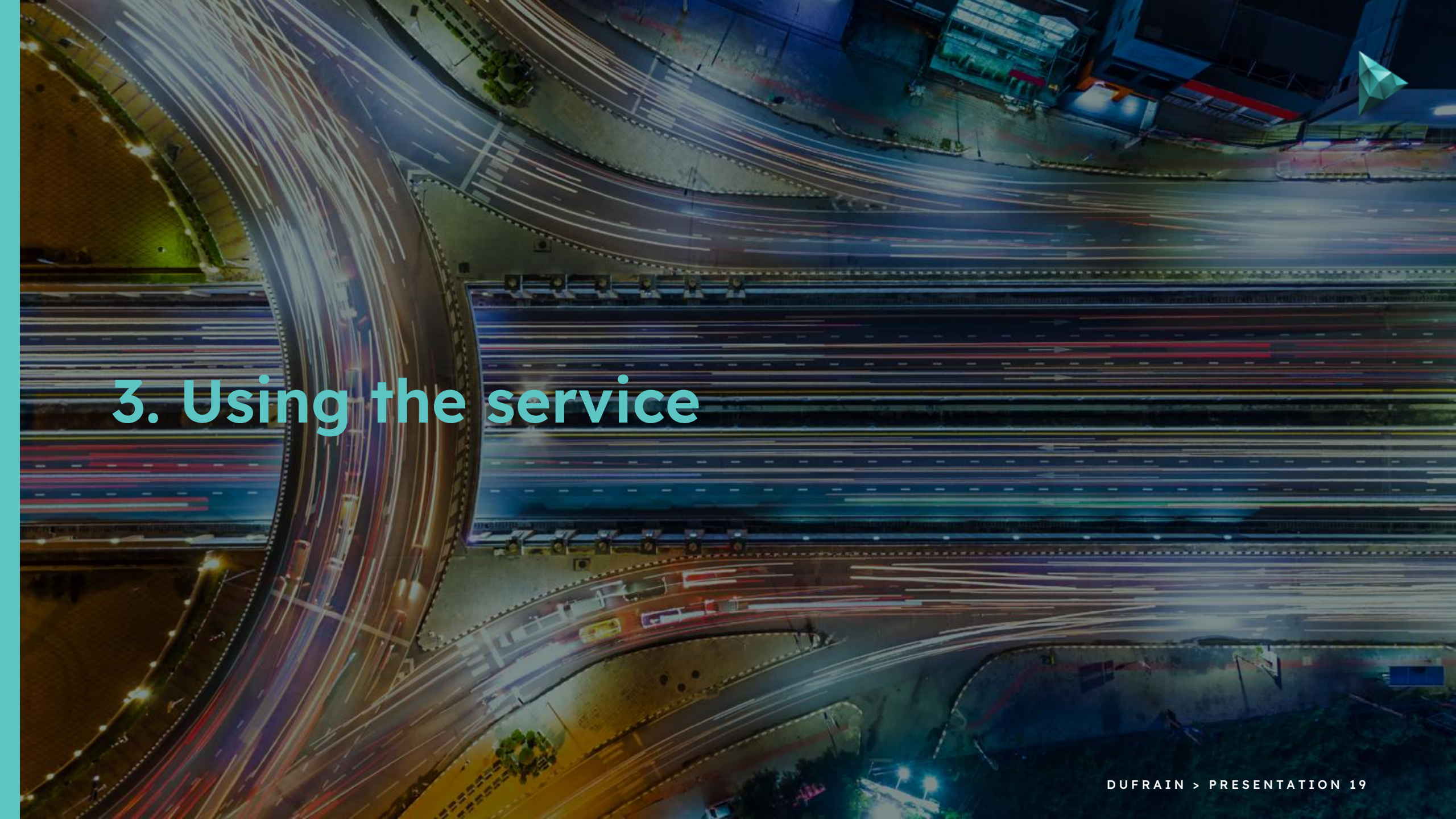
Data Breach Response

All data breaches are recorded, and where legally required, reported to the Information Commissioner within 72 hours. Affected individuals are informed, as necessary. The company maintains a Data Breach Register and has a Breach Notification policy.

Third-Party Processing and International Transfers

Any third parties processing data on behalf of the company are required, via data processing agreements, to maintain equivalent data protection standards. The company does not transfer personal data outside the EEA.





3. Using the service

Using the service

Ordering and Invoicing

Working with Dufrain is easy, firstly contact enquiries@dufrain.co.uk and we will connect you to a representative to discuss your requirements and establish how Dufrain can best assist. We will assist fully in placing an order, working collaboratively to ensure that our services fully meet the demand. Our fees are always invoiced in arrears, regardless of the service we are providing, Time and Materials (T&M) engagements will be invoiced monthly in arrears and milestone-based projects on successful sign off of the milestone deliverables as defined in the order form. Payment terms are 30 days from the date of invoice.

Trial service

As a consultancy there is no free trial available.

On-Boarding, Off-Boarding, Service Migration, Scope etc.

On-boarding, Off-Boarding will be reviewed and agreed on a service-by-service basis but will always include

On Boarding & Off Boarding

- Project/Service Initiation or Decommissioning Meeting (including existing/new Service Provider)
- Review of Dependencies & Existing Materials with existing/incoming Service Provider and Stakeholders
- Agreed Onboarding/Offboarding Timeline & Scope with Stakeholders and any parallel running requirements
- Service Migration
- All documentation of existing process or procedure to be handed over
- All system, data architecture and service descriptions to be handed over
- All access to services or subscriptions to be handed over in a timely agreed manner
- Access to people with service “know how” during the offboarding procedure not to be unreasonably withheld



Using the service

Training

Dufrain will provide training for all relevant services delivered, including the handover of delivered or managed services. We will also provide SME data consultants to embed into project or managed service teams to help upskill and develop organic capability. Our consultants can provide training on-line over collaboration platforms such as Microsoft Teams or in person at either client site or our offices (see our pricing document for day rates).

Implementation plan

Dufrain offer wide ranging services, and a detailed implementation plan will be provided to the buyer on request.

Dedicated account manager

At the point of enquiry Dufrain will assign a dedicated Account Manager to work with you and your team.



Using the service

Service Management

Dufrain provide a fully managed service for cloud hosted data platforms and services, including Machine Learning (ML) and Artificial Intelligence (AI) based services. Dufrain has a 24/7/365 support desk, leveraging Site Reliability Engineering (SRE) and DevOps methodologies to proactively monitor and maintain services to identify potential issues or bottlenecks to rapidly remediate before they impede operational performance. We integrate monitoring and alerting to our workflow management tooling, offering a fully automated end-to-end service to ensure that events are efficiently and effectively managed through their lifecycle. Managed by dedicated Service Delivery Managers (SDM), the service is fully transparent to stakeholders, ensuring that communications, performance against SLI, SLO and SLAs are managed within a framework of collaboration and continuous improvement. Dufrain's service catalogue is extensive, including Cloud Infrastructure Management, Cloud Vendor Support, Data Platform Management, Analytics Platform Management, Infrastructure Provisioning, Metadata and Data Quality Management and Release Management. Our services are completely accessible to clients through our Service Management portal.

Service levels and constraints

We provide tailored Service Level Agreements (SLA) within our 24/7/365 support construct based on specific operational requirements. SLAs would be agreed with the buyer and documented in the order form as agreed between both parties. Any constraints to this service would be clearly defined and communicated to the buyer as a part of this documentation.



Using the service

Outage and maintenance management

Dufrain build reliable, robust and resilient services using industry and technology best practice standards with an expectation that end-users need continuous operational availability. As such, any activity where there was a possibility of service disruption would be agreed in advance with consumers during service review meetings or ad-hoc as required and scheduled at a time where it would cause minimal disruption to operations.

Financial recompense model

Dufrain would be willing to discuss potential models for financial recompense for failure to deliver against agreed outcomes as part of the Service Delivery contract/ order form.





4. Provision of the service

Provision of the service

Customer responsibilities

General responsibilities would include:

- Access to IT systems and services, including hardware, software and access.
- Access to stakeholders relevant to the delivery of the engagement i.e. support teams, end-users, SMEs etc..

Technical and client-side requirements

Any requirements would be discussed with the buyer and documented in the Order Form as agreed by both parties.

After sales account management

Dufrain assigns a dedicated Account Manager to every engagement, providing a clear point of contact and route to additional support. We implement a reporting framework aligned to delivery, underpinned by our Delivery Satisfaction Assessment Programme (DSAP), to capture routine feedback and continually calibrate and improve. Our aim is to build enduring, collaborative relationships that support the critical work of the public sector.

Termination

Dufrain work on a 30-day notice period if an engagement is terminated early by a buyer. The full termination process is documented in the Terms and Conditions, between the parties, where all rights and responsibilities are documented..



5. Our Experience

Supporting Salts Healthcare's bold ambitions to upskill and be data-driven



**Centralised platform
enabled single source of
truth and real-time
insights**

**Analytics team upskilled,
unlocking new career
progression and team
motivation**

**Automation of data
gathering unlocked
growth and opened up
new revenue potential**

PROBLEM/CHALLENGE

Salts Healthcare, a global medical device manufacturer, was ready for a new phase of growth and needed to make fast, informed decisions powered by data. Outdated on-premises infrastructure, manual processes, and lengthy ETL cycles were holding the business back, while recent changes in the analytics team meant upskilling was urgently required.

Salts Healthcare set two clear goals: improve access to data and analytics for better decision-making and accelerate the development of its analytics team with expert support. Finding a partner who could deliver both was challenging, but getting this relationship right was essential for future success.

SOLUTION

Dufrain began by focusing on Salts Healthcare's business goals, linking data strategy directly to the company's ambitions. Instead of a lengthy assessment, a proof-of-concept build was proposed, delivering value at speed and unlocking rapid insights through a central Azure cloud platform, with discovery, rollout, and ongoing support built in.

This approach quickly proved its worth. Salts Healthcare gained fast access to actionable insights, enabling more informed decisions and the flexibility to adapt the solution across the business. Training and support ensured the team could maximise value from day one.

OUTCOME and IMPACT

Salts Healthcare described the upskilling delivered by Dufrain as "invaluable", with the project's success leading to company-wide adoption. The executive team quickly recognised the true value of transformation, unifying all data in a single, intuitive cloud platform and automating manual work, freeing up the analytics team to focus on what matters.

With revolutionary insights now driving informed decisions, the project has shaped growth strategy, enabled internal promotions, and supported team development. Salts Healthcare is now exploring data monetisation, a new opportunity unlocked by this transformation.

Taking data maturity to the next level at Howden



SECURING YOUR DATA

83%

Reduction in Group Owned Workspaces

REDUCING OVERHEAD

51%

Reduction in Group Owned Assets

ENGAGING USERS

18

Strategic Assets Launched

PROBLEM/CHALLENGE

The group's federated business model allowed their Power BI platform to grow organically with very little control in place, gaps in data literacy and a lack of BI maturity. The group BI team were fire fighting and struggling to maintain the platform while delivering new insights.

The aim was to enable an operating model where business units are empowered to take on their own Power BI initiatives, while creating a central approach to governance that balances the need for controls without hindering innovation.

SOLUTION

Dufrain embedded Power BI experts in the Group BI team to deliver our Power BI Adoption framework, tailoring it to the group's needs. We supported them through the delivery of strategic models to bring the new framework to life. Launch of new group wide Power BI community & training to drive adoption.

Dufrain's Power BI Experts guided the team through a Platform Clean-Up initiative to reduce Group Owned Workspaces and Assets, supported by monthly audits of the platform and strategic QA audits.

OUTCOME and IMPACT

Group Data owned assets reduced from over 400 to 40, from platform clean-up activity alone. New usage policies and change management processes active to maintain platform, and Power BI community was activated with wide business participation and knowledge sharing. A new Group Power BI Lead and team were upskilled and confidently owning platform governance and user adoption.

'We needed a partner who was vendor agnostic and who we could trust. In the case of Dufrain, the relationship began with trusted advisory designed by process optimisation and evolved into fixing some of our most tricky problems. What Dufrain recommended was achievable and measurable. They were really excited about working with Howden, which was infectious and permeated back into the Howden team'

Will Hyams, Group Head of Data

HOWDEN

Enabling a 360° customer view with a scalable cloud data warehouse



Delivered a scalable cloud data warehouse to support aggressive growth

Built a single view of the customer across the full sales lifecycle

Implemented modern Azure-based infrastructure and governance

PROBLEM/CHALLENGE

Aerial Direct, O2's largest Direct Business Partner, needed a robust, cloud-first data platform to support rapid growth. The business faced key challenges: data scattered across multiple systems with no unified customer view, manual and inconsistent reporting, a lack of governance across the Power Platform, and the need to modernise Azure infrastructure while staying compliant.

To address these issues and enable smarter decision-making, Aerial Direct sought a trusted partner to design and build a scalable solution. The goal was to solve current inefficiencies and lay the foundation for future growth.

SOLUTION

Dufrain partnered with Aerial Direct to co-create a solution focused on performance, governance, and scalability. The team designed a best-practice Azure estate and delivered a scalable, serverless Azure SQL data warehouse, building a meaningful data model with Azure Data Factory and reinforcing governance through Azure policy initiatives and Azure Purview.

Throughout the project, Dufrain provided clear documentation and embedded a collaborative, agile approach to support Aerial Direct's evolving needs. The result: a modern data platform, fully aligned with Aerial Direct's strategic vision and ready to drive future growth.

OUTCOME and IMPACT

Aerial Direct now benefits from a fully scalable and secure data warehouse, with high-quality documentation across all data sources and ETL processes. Seamless integration with Power BI and Power Platform tools delivers a single customer view across the entire sales journey, unlocking operational efficiencies through automation. Ongoing managed service ensures controlled change and supports cloud evolution, empowering the business with reliable insights and a platform built for future growth.

£5 Million Saved Through Data Insights



Identification of Cost Saving

£5m Reduction in cost related to paper

Reduction in Consumption

6.8m Fewer sheet of paper annually

Environmental Savings

5,550 Trees saved annually

PROBLEM/CHALLENGE

A top four financial services client facing a wider cost-reduction initiative sought to cut a £60 million annual print, mail, and logistics bill.

They needed to identify customer behaviours and cost-saving opportunities while managing the operational complexity of shifting from paper to digital communications without disrupting customer experience.

SOLUTION

Dufrein analysed customer data to identify digitally active users still receiving paper statements, encouraging a switch to digital.

We also modelled consolidation scenarios for remaining paper users, such as combining statements and letters or reducing frequency, to cut costs.

Dufrein delivered a Tableau report to visualise paper consumption forecasts, 12-month production trends and the impacts of project initiatives.

OUTCOME and IMPACT

Our insights enabled £5 million in immediate annual savings, with a further £3 million projected following infrastructure upgrades.

Dufrein's analysis provided actionable intelligence and strategic direction that significantly reduced operational costs and improved customer communications efficiency.



A new Data Strategy to modernise and take Nordea into the future



Significant licence savings achieved through minor data model adjustments.

Substantial discount negotiated on Nordea's platform renewal.

Reduced time-to-production for fresh data, improving usability for end-users.

PROBLEM/CHALLENGE

Nordea needed a rapid assessment of their data landscape to strengthen negotiating power ahead of platform licensing renewal and sought a strategy to maximise data value and guide modernisation efforts.

SOLUTION

- Conducted a SAS platform audit and data maturity assessment.
- Developed a comprehensive Data Strategy and roadmap, addressing:
 - Maximising data value.
 - Future requirements for people, culture, and skills.
 - Breaking down roadmap items into actionable projects.

OUTCOME and IMPACT

- Achieved significant licence savings and a substantial renewal discount.
- Reduced time-to-production for fresh data, enhancing usability.
- Delivered a clear roadmap for efficient business planning and long-term data modernisation.

Our Clients in Banking, Financial Services & Insurance

Banking



Clear.Bank®



The
co-operative
bank



Sainsbury's
Bank



TESCO
Bank



Nordea



Insurance



HOWDEN



THE
Ardonagh
GROUP



ethos
broking



Other Financial Services



equiti



SAUNDERSON
HOUSE

worldpay



Computershare

Wider Client Ecosystem



Industrial & Manufacturing



Professional Services



Leading Consumer Brands



Our Partners



Services Partners

kainos®



Deloitte.



Technology Partners





Dufrain

GET IN TOUCH

T. 0800 130 3656

E. enquiries@dufrain.co.uk