

Umbraco CMS Website Onboarding and Enablement

Service Definition

1. Service overview

Umbraco CMS Website Onboarding and Enablement is a service designed to onboard, maintain, support, and where applicable update an Umbraco CMS website to the latest long term support version. It helps public sector organisations manage their website confidently by providing practical support for content management, ongoing maintenance, workflows, and governance following delivery or migration.

2. How the service works

The service is delivered through planned onboarding and enablement sessions aligned to the buyer's Umbraco configuration and team roles.

Typical delivery activities include:

- **Service Onboarding & Scoping:** Alignment session to confirm scope, responsibilities, and platform context (e.g. LTS version, hosting setup, integrations).
- **Technical Health Check:** Review of platform performance, load speed, hosting setup, uptime, and caching strategy to highlight optimisation opportunities.
- **Codebase Review:** High-level analysis of Umbraco implementation against best practice (security, scalability, maintainability), including any third-party packages or legacy custom code.
- **Security & Compliance Audit:** Review of access controls, patching status, and CMS hardening to ensure the platform meets current public sector standards, including Cyber Essentials.
- **Version & Lifecycle Planning:** Assessment of your current Umbraco version against the Long-Term Support (LTS) roadmap, with guidance on upgrade planning and technical debt.
- **Content Governance & Workflow Review:** Evaluation of editorial workflows, approval processes, and role-based permissions to reduce publishing risk and maintain content quality.



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- Practical Recommendations Report: Consolidated findings with prioritised actions, aligned to your technical capacity, roadmap, and support arrangements.
- Provision of supporting documentation and materials

Sessions are typically delivered remotely and scheduled to suit buyer availability.

3. Skills and experience

The service is delivered by practitioners with experience in Umbraco CMS delivery, content management and user enablement.

Roles typically involved include:

- Delivery or training lead
- Umbraco CMS specialist
- Content or UX specialist
- Quality Control
- Frontend developer
- Information technology
- Support engineer
- Account manager

The team applies established onboarding and training approaches suitable for public sector teams and operational environments.

4. Relevant experience

The supplier has delivered Umbraco onboarding and enablement activities for public sector and regulated organisations.

Typical examples include:

- Umbraco CMS platform onboarding



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- Enablement transitioning from legacy or unsupported platforms
- Governance-focused support, maintenance and development

These engagements have resulted in platform stability and longevity, improved platform performance, security compliance and reduced errors for more consistent content publishing.

5. Onboarding and offboarding

Onboarding

The service begins with mobilisation to confirm objectives, scope, attendees and scheduling. The buyer provides access to the Umbraco CMS environment and details of roles, permissions and workflows. Handover meeting with incumbent support to plan onboarding.

Offboarding

At completion, all training materials and agreed outputs are provided to the buyer. A close-out session may be held to review learning outcomes and confirm any follow-up actions.

6. Service constraints

The service provides onboarding for future maintenance, development or ongoing support. The service is delivered through a project-based engagement that aligns with the buyer's requirements and delivery approach.

7. Service management and support

Delivery is managed by a named delivery lead responsible for coordination, scheduling and communication. Progress is reviewed during delivery to ensure enablement objectives are met. Ongoing support after onboarding delivery is included.



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8. Technical and operational requirements (if applicable)

Buyer involvement will include providing access to the Umbraco CMS environment, relevant documentation and collaboration tools for remote sessions.

The service will require the buyer or incumbent supplier to provide access to the technical infrastructure.

9. Hosting, data and security

The service does include hosting or operation of systems. Any buyer-provided information or CMS access is used solely for training purposes and handled in line with agreed confidentiality and security requirements.

10. Exit, data return and deletion

At the end of the service, all buyer-owned materials and training outputs are returned. Any copies held for delivery purposes are deleted in line with agreed confidentiality arrangements. No ongoing access or transition support is provided beyond close-out activities.



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