

# 848

# 848 Insightful Business – Data Foundation & Architecture

Part of

The Insightful Business

Prepared by

Dave Cheetham

Pursuit Intelligence and Growth Lead

Monday, 05 January 2026

# Service Overview and Context

## What Our Customers Experience

Organisations accumulate data across disconnected systems, legacy applications, unstructured sources, and manual processes. Reporting grows inconsistent, analytics become siloed, and decisions rely on incomplete or out-of-date information.

Teams struggle to trust their data, stakeholders lack clear visibility, and leaders find it difficult to anticipate issues or understand the real impact of change. As operational environments evolve, these gaps grow wider, increasing uncertainty and reducing the organisation's ability to make timely and evidence-based decisions.

Without a structured approach, organisations invest in tools and dashboards that fail to address underlying data issues. Effort becomes fragmented, quality varies across teams, and insights remain shallow or reactive.

To improve performance, organisations require clear data foundations, well-governed processes, reliable and meaningful integration, and the capability to generate meaningful insight from operational activity.

## Our Framework for Clarity and Improvement

848's Intelligent Business Framework provides the structure required to define and sustain a coherent Microsoft data estate. It establishes how data should flow through the organisation, how definitions and relationships should be structured, and how governance ensures data is accurate, understood, and usable.

The Framework brings together data architecture, modelling, lineage, ownership, and quality into a single, unified approach that supports predictable data outcomes.

Through this Framework, Data Foundation & Architecture becomes a practical enabler of organisational intelligence. It ensures that data is structured according to agreed models, that lineage is traceable, that stewardship is clear, and that Microsoft technologies operate as a connected ecosystem rather than isolated services.

This establishes the foundation needed for Insightful Business capabilities to function reliably and at scale.

## The Insightful Business Outcome Area

The Insightful Business outcome area focuses on creating the conditions for clear, trustworthy, and actionable insight across the organisation. It strengthens decision-making by ensuring that data is accurate, connected, and aligned to business meaning.

This outcome area establishes the structures, processes, and architectures required to prepare data for analytics, automation, and emerging intelligence capabilities.

Data Foundation & Architecture is the first and most critical component of this outcome area. It defines how data is organised, governed, modelled, and maintained across Microsoft technologies.

By establishing consistent definitions, relationships, and architectural patterns, the Insightful Business ensures that downstream services, such as analytics, dashboards, machine learning, and automated decisioning are built on a solid and reliable data foundation.

## 848 Insightful Business – Data Foundation & Architecture

Organisations generate and store data across multiple systems, legacy applications, and emerging cloud services. Over time, these environments become fragmented, inconsistent, and difficult to govern.

Teams struggle to access reliable information, platforms do not integrate cleanly, and data structures evolve in ways that create duplication, technical debt, and operational uncertainty. Without clear architectural direction, the data estate grows organically rather than deliberately, limiting the organisation's ability to deliver accurate insight at scale.

The Data Foundation & Architecture Service Stream strengthens The Insightful Business by bringing structure, coherence, and long-term stability to the way data is organised and managed. It establishes the architectural models, platform principles, and structural conventions that allow the organisation to use its data reliably and purposefully.

By aligning data foundations to the Intelligent Business Framework, the service ensures that information flows are traceable, governed, and connected to the organisation's wider objectives. This gives teams a consistent environment in which insight can be developed and maintained with confidence.

## Purpose of This Document

This document describes how 848 delivers the Data Foundation & Architecture Service Stream within The Insightful Business. It sets out the purpose, scope, and operating approach of the stream, providing a clear explanation of how foundational data structures, architectural models, and platform design principles are defined and implemented.

The document explains how work is organised, how responsibilities are shared, and what customers should expect when engaging this Service Stream.

It is intended for procurement teams, data leaders, architects, and stakeholders who require a transparent understanding of how foundational data capabilities are established and governed.

The document should be read as part of the wider Intelligent Business Framework, which provides the context for how this Service Stream supports evidence-based decision-making and responsible use of organisational data. It gives a structured view of the work, the benefits it enables, and the boundaries that define the service.

# The Intelligent Business Framework

Modern organisations depend on technology that support clear outcomes: reliable operations, effective protection, efficient processes, informed decisions, and the ability to adapt. Achieving these outcomes requires more than individual systems or isolated projects. It demands a structured approach that links technology, governance, and operational practice to the results the organisation is working toward.

The Intelligent Business Framework provides this structure. It is the model 848 uses to organise, deliver, and improve services in a way that aligns directly to business need. Rather than presenting a catalogue of independent services, the Framework shows how each area of capability connects to a defined aspect of organisational performance. This gives customers a consistent way to understand what each service is designed to achieve and how it contributes to wider improvement.

The Framework also brings coherence across the 848 portfolio. It defines the outcome areas that modern organisations typically strengthen and introduces a common language for discussing priorities, risks, and investment decisions. This supports focused planning and ensures work progresses in a coordinated and integrated manner, regardless of where an organisation chooses to begin.

## Introduction to 848's Intelligent Business Framework

An Intelligent Business is an organisation that develops and operates its technology, processes, and governance in a way that directly supports its core outcomes. It uses platforms, data, security controls, and ways of working to maintain resilience, reduce risk, improve performance, and adapt to change in a controlled and predictable manner.

In an Intelligent Business, technology is not implemented as a set of isolated systems. It functions as an integrated part of how work is carried out, how decisions are made, and how the organisation meets its obligations. Stability, protection, efficiency, insight, and innovation are treated as connected aspects of the operating model rather than separate technical concerns.

An Intelligent Business has clear visibility of its environment, understands how its services and processes interact, and makes decisions based on evidence, risk, and organisational impact. It can respond effectively to new demands, maintain operational continuity as conditions change, and introduce new capability without undermining what is already in place.

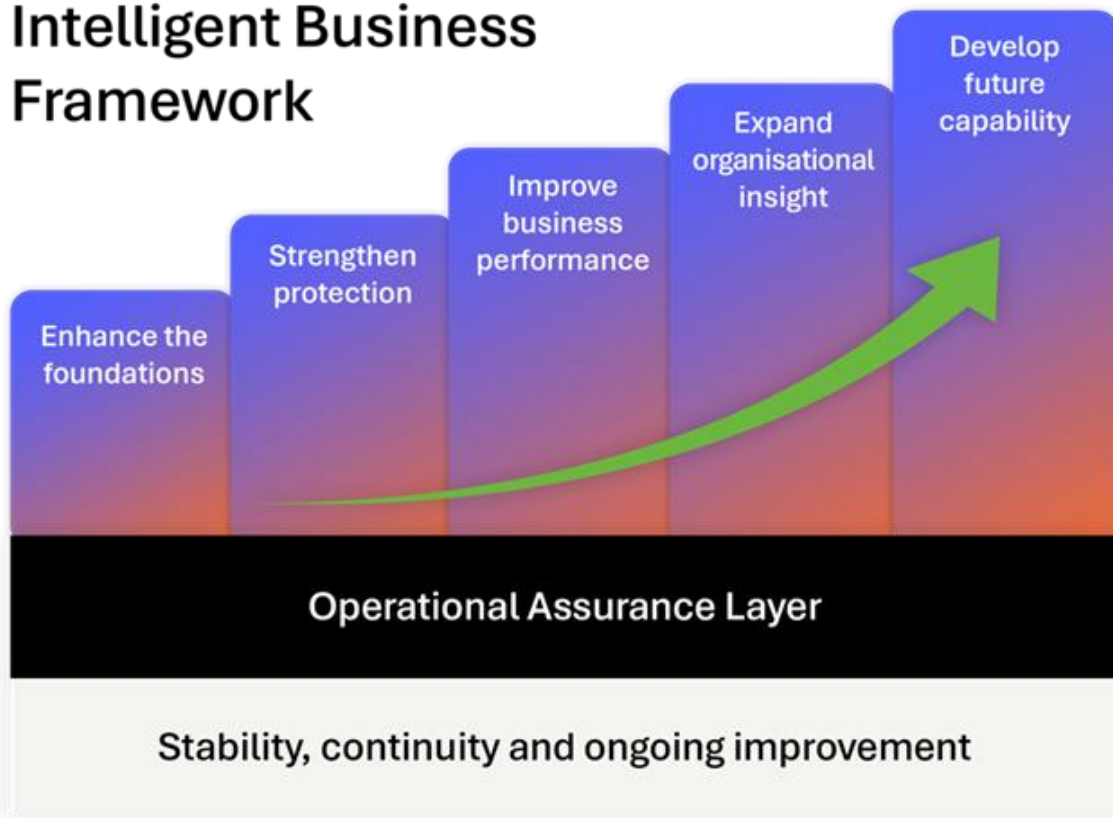
Ultimately, an Intelligent Business uses technology, governance, and operational practice to support reliable, secure, and continually improving performance. It focuses on outcomes, aligns effort to organisational need, and ensures that improvements contribute to long-term capability rather than short-term fixes.

The Intelligent Business Framework is the structure 848 uses to help organisations develop the capabilities required to operate in this way. It translates these characteristics into clear areas of focus, showing how different types of work contribute to stability, protection, efficiency, insight, and future capability. By organising services around these areas, the Framework provides a predictable way to understand what each service achieves and how it supports wider operational goals. This creates a practical link between the outcomes an Intelligent Business depends on and the work required to build and maintain them.

## The Operating Domains of The Intelligent Business

An Intelligent Business strengthens capability across several interconnected domains that influence how effectively the organisation operates. These domains reflect the areas where stability, protection, performance, insight, and future capability are developed over time. Each domain represents a different aspect of organisational need, and improvements in one area support progress in others. Organisations may focus on any domain depending on their priorities, with no fixed starting point or prescribed order.

### Operating Domains of the Intelligent Business Framework



The Operating Domains describe where organisations strengthen capability, while the Outcome Areas show how the 848 portfolio is structured to support that development. Each Outcome Area represents a defined category of work within the Framework, organising services into clear themes that align to organisational performance. Together, they translate the operating domains into a practical, service-aligned structure that enables consistent planning, delivery, and improvement.



## The Insightful Business

The Insightful Business enables organisations to make informed, timely, and confident decisions. It focuses on improving visibility of operations, strengthening reporting, and ensuring that data is captured, managed, and interpreted in a way that supports organisational objectives.

Developing this outcome area improves the organisation's ability to understand current performance, identify emerging issues, and assess the impact of change. It provides the foundation for measurement, analysis, and evidence-based planning across all areas of the Intelligent Business.

## The Innovative Business

The Innovative Business supports the development of new capability and structured improvement. It enables organisations to explore new approaches, adopt modern tools and methods, and respond effectively to changing needs or opportunities. This outcome area covers areas such as automation, AI adoption, and the creation of new service models or ways of working.

Strengthening this area helps organisations evolve at a controlled pace. It ensures that innovation is introduced safely, aligned to organisational priorities, and built on a stable foundation, without disrupting existing operations or increasing the organisation's level of risk.

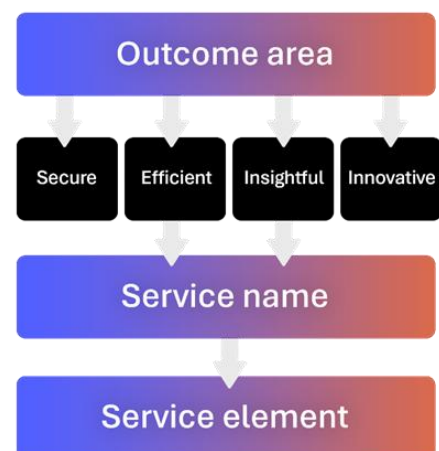
## The Value Chain-Led Managed Service

The Value Chain-Led Managed Service provides the operational assurance that underpins every other outcome area. It maintains continuity, stability, and performance by aligning support to the organisation's value chain — the real end-to-end flow of work that keeps the organisation operating.

This outcome area ensures that services are monitored, governed, and improved through a structured, consistent approach. It reduces operational friction, maintains alignment between service delivery and business need, and supports the organisation's ability to sustain improvements made across the other outcome areas.

## How Services Align to the Outcome Areas

Each Outcome Area is supported by a set of Service Streams, and each Stream contains the individual Service Elements that make up the work delivered. This structure provides a clear line of sight from each Service Element to the organisational outcome it supports. It ensures that services are delivered consistently, contribute to defined areas of performance, and can be selected according to the organisation's priorities without needing to follow a fixed sequence or maturity path.



# The Insightful Business

## What The Insightful Business Is

The Insightful Business is the part of the Intelligent Business that ensures the organisation can understand, measure, and interpret what is happening across its operations. It establishes the data foundations, governance structures, engineering models, and analytical capabilities that shape how information flows and how insight is derived.

This outcome area defines how data is captured, integrated, and managed, and sets the standards that maintain its accuracy and reliability. It ensures analytics are based in trusted information, that reporting reflects the true state of operations, and that insights support both immediate decision-making and long-term planning.

The Insightful Business connects strategic intent with operational reality. It gives organisations the ability to see what is driving performance, understand emerging risks, and measure the effect of change through reliable, traceable, and consistent data.

## How Work Is Structured Within The Insightful Business

Work within The Insightful Business is organised across five Service Streams that together develop and mature the organisation's data and insight capabilities:

### Data Foundation & Architecture

This stream defines the structural models, architectures, and platform foundations that determine how data is stored, organised, and accessed. It establishes the technical principles that support scalable, governed data environments.

### Data Integration & Engineering

This stream manages how data is moved, processed, and prepared for use. It ensures data flows reliably across systems, creating consistent and usable datasets that support analytics, reporting, and operational insight.

### Data Governance & Quality

This stream defines the controls, responsibilities, policies, and processes that maintain data accuracy, lineage, and trust. It establishes the organisational structures that support responsible and compliant data use.

### Analytics & Insight Enablement

This stream enables the organisation to interpret its data through reporting, dashboards, analysis models, and decision-support capabilities. It ensures insights are meaningful, timely, and aligned to organisational need.

### Data Science & Intelligent Automation

This stream provides advanced analytical capability, including machine learning, predictive modelling, and intelligent process automation. It supports proactive decision-making and the creation of new value through data-driven innovation.

These Service Streams operate as a single model for strengthening insight capability. Each focuses on a specific area of maturity, but all contribute to the organisation's ability to understand performance and make informed decisions with confidence.

## What The Insightful Business Helps Organisations Achieve

The Insightful Business enables organisations to work with clarity, accuracy, and foresight. By strengthening this outcome area, organisations gain:

- Reliable and trusted data that supports evidence-based decision-making.
- Clear visibility of operational performance, risks, and dependencies.
- Improved measurement and reporting that aligns to strategic and operational objectives.
- Faster identification of issues, trends, and emerging challenges.
- The ability to predict outcomes and understand the impact of change.
- Confidence that insights are accurate, timely, and grounded in data that is well-governed and consistent.
- A structured foundation for advanced analytics, automation, and intelligent capability.

With these improvements, organisations move from reactive reporting to proactive, insight-led management. They make decisions supported by evidence, reduce uncertainty, and build the capability to plan and respond with greater confidence.

## How This Outcome Area Supports The Intelligent Business

The Insightful Business enables the Intelligent Business to operate with clarity and purpose. It strengthens every other Outcome Area by providing the visibility required to understand performance, measure progress, and assess risk.

- The **Intelligent Core** relies on trusted data to inform architectural and engineering decisions.
- The **Secure Business** requires accurate information to manage risk, monitor exposure, and maintain compliance.
- The **Efficient Business** depends on reliable insight to identify bottlenecks, measure flow, and improve processes.
- The **Innovative Business** uses data to test ideas, validate change, and scale new capability responsibly.
- The **Value Chain-led Managed Service** depends on insight to maintain operational continuity and improve service performance.

By aligning data, analytics, governance, and intelligent capability to the organisation's operating model, the Insightful Business ensures that decisions at every level are informed, traceable, and grounded in reality. It strengthens the organisation's ability to plan effectively, adapt confidently, and maintain control as conditions evolve.

# 848 Insightful Business – Data Foundation & Architecture

## 848 INSIGHTFUL BUSINESS PORTFOLIO

| DATA FOUNDATION & ARCHITECTURE                    | DATA INTEGRATION & ENGINEERING                   | DATA GOVERNANCE & QUALITY                    | ANALYTICS & INSIGHT ENABLEMENT                    | DATA SCIENCE & INTELLIGENT AUTOMATION               |
|---------------------------------------------------|--------------------------------------------------|----------------------------------------------|---------------------------------------------------|-----------------------------------------------------|
| Data Strategy and Roadmap Design                  | Data Integration Strategy and Roadmap            | Data Governance Framework Design             | Analytics Strategy and Roadmap Design             | AI Readiness and Use Case Assessment                |
| Data Estate Modernisation Assessment              | Data Pipeline Readiness Assessment               | Data Stewardship Model Development           | KPI Framework and Metrics Definition              | Fabric Data Science Environment Enablement          |
| Data Architecture Governance Framework            | Source-to-Target Mapping and Design              | Data Policy and Standards Definition         | Analytics Use Case Discovery Workshop             | MLOps Framework Implementation                      |
| Cloud Data Platform Implementation (Azure/Fabric) | Fabric Data Factory Pipeline Deployment          | Microsoft Purview Governance Deployment      | Power BI Enterprise Deployment                    | Predictive and Advanced Analytics Model Development |
| Hybrid Data Architecture Design                   | Synapse Data Engineering Implementation          | Data Quality Management Implementation       | Fabric Lakehouse Analytics Implementation         | Generative AI and Copilot Integration               |
| Reference Data Management Setup                   | Dataflow Gen2 Transformation Enablement          | Data Compliance and Privacy Automation       | Semantic Data Model Design                        | Model Deployment and Monitoring Service             |
| Metadata and Data Catalogue Enablement            | API and Connector Integration Services           | Data Lineage and Classification Enablement   | Executive Dashboard and Performance Reporting     | Embedded Analytics in Business Applications         |
| Master Data Management (MDM) Deployment           | ETL/ELT Orchestration Framework Setup            | Data Quality Monitoring and Reporting        | Self-Service Analytics Enablement                 | Decision Workflow Automation (Power Automate)       |
| Data Storage and Performance Optimisation         | Data Pipeline Automation and Scheduling          | Governance Maturity Assessment and Roadmap   | Data Literacy and Adoption Programme              | Fabric Data Activator Enablement                    |
| Data Platform Health and Compliance Review        | Pipeline Monitoring and Performance Optimisation | Data Issue Management and Resolution Service | Analytics Performance Optimisation and Governance |                                                     |

## Alignment to The Intelligent Business

The Data Foundation & Architecture Service Stream strengthens The Intelligent Business by establishing the structural integrity required for accurate, trusted, and actionable insight. The Intelligent Business depends on information that is reliable, traceable, and aligned to operational reality.

This Service Stream provides the architectural clarity and platform foundations that ensure data is captured, stored, and organised in a deliberate and governed manner.

By defining the models, standards, and design principles that shape the data estate, the service improves the organisation's ability to use information responsibly and consistently. It supports value flow by ensuring data moves correctly between systems and aligns with the way work is carried out across the organisation.

This reduces ambiguity, strengthens accountability, and enables informed decision-making in every Outcome Area.

The service reinforces the Insightful Business by ensuring that analytics, reporting, governance, and automation activities are built on a stable and coherent foundation. It improves operational reliability by reducing data duplication, fragmentation, and architectural drift.

It supports clarity by standardising how data is structured, accessed, and governed, giving employees a predictable environment in which to use and interpret information. Through these improvements, the service creates confidence in the data that underpins daily operations, strategic planning, and long-term transformation.

## Service Purpose

The Data Foundation & Architecture Service Stream exists to ensure the organisation's data estate is coherent, stable, and capable of supporting accurate and timely insight.

Many organisations operate with fragmented data platforms, inconsistent structures, and legacy arrangements that make it difficult to access, trust, or use information effectively.

These issues increase operational effort, introduce risk, and limit the organisation's ability to generate meaningful analysis.

This service addresses those challenges by defining the architectural models, platform structures, and foundational components that support reliable data use.

It provides the organisation with a clear and governed framework for how data is stored, integrated, and managed, removing ambiguity and reducing technical drift. Through this improvement, teams gain a dependable environment for reporting, analytics, and decision support, and the organisation strengthens its ability to plan, measure, and respond with confidence.

## What This Service Provides

The Data Foundation & Architecture Service Stream provides individuals across the organisation with the clarity, structure, and confidence needed to understand, manage, and use data consistently.

It ensures that data definitions, relationships, lineage, and ownership are transparent across Microsoft technologies. Each role group benefits from improved trust in the data, reduced ambiguity, and clearer alignment between business meaning and technical structure.

| Role Group                       | What They Gain                                                                                                                                                                                                                                                                                 | Why They Matter                                                                              |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| Executive Teams & Senior Leaders | Confidence that organisational data is structured, governed, and trustworthy.<br><br>Clear visibility of the foundational data conditions required for insight-driven decision-making.<br><br>A structured basis for future investment in analytics, automation, and intelligent capabilities. | They rely on accurate, consistent information to guide strategy and organisational planning. |
| Data Owners and Data Stewards    | Clear definitions of data elements, business meaning, and lineage.<br><br>Improved visibility of responsibilities across data domains.<br><br>Structured governance practices that support data quality and consistency.                                                                       | They are accountable for how data is defined, used, and maintained within the organisation.  |

|                                                                   |                                                                                                                                                                                                                                                                                      |                                                                                                        |
|-------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| Business Domain Leaders and Process Stakeholders                  | <p>A shared understanding of how data within their domain relates to other areas of the business.</p> <p>Clarity on definitions, relationships, and data lifecycle expectations.</p> <p>Confidence that Microsoft data sources support accurate and meaningful business insight.</p> | They define the meaning and context of the data that drives organisational activity.                   |
| Data Architects and Data Modelling Specialists                    | <p>A coherent architectural framework across Microsoft data services.</p> <p>Clear modelling standards for designing logical and physical data structures.</p> <p>Improved alignment between data flows, business meaning, and downstream analytical needs.</p>                      | They translate business concepts into structured, usable data models across platforms.                 |
| Data Engineers and Platform Engineers                             | <p>Defined structures, metadata requirements, and modelling patterns that guide data ingestion and transformation.</p> <p>Clarity on how data should be organised to support consistent downstream usage.</p> <p>A more stable, predictable data foundation to build upon.</p>       | They operationalise data modelling and architecture through implementation within Microsoft platforms. |
| BI Developers, Analytics Practitioners, and Report Builders       | <p>Reliable, consistent, and well-modelled data that improves the accuracy of analytical outputs.</p> <p>Reduced need for workaround modelling, cleansing, or reconciliation.</p> <p>Confidence that semantic models and data structures reflect the organisation's definitions.</p> | They build insight products that depend on trustworthy data foundations.                               |
| Data Governance, Compliance, and Information Management Functions | <p>Clear ownership, lineage, and governance structures across the Microsoft data estate.</p> <p>Defined rules for how data should be catalogued, described, and maintained.</p> <p>Improved ability to ensure data is compliant with organisational and regulatory expectations.</p> | They maintain oversight of how data is managed and protected across its lifecycle.                     |

## How This Service Is Delivered

The Data Foundation & Architecture Service Stream is delivered through a structured methodology that establishes a clear, consistent, and trustworthy Microsoft data estate. This method ensures that data definitions, models, lineage, and governance structures are designed intentionally and applied consistently across the organisation. Each stage builds clarity, structure, and control over how data is created, related, maintained, and used.

| Method Component     | Stage 1: Understand the Data Estate & Strategic Drivers                                                                                           | Stage 2: Define Foundational Data Architecture & Governance Structures                                                                                                   | Stage 3: Engineer & Enable the Microsoft Data Platform Foundation                                                                                                 | Stage 4: Embed Governance, Ownership & Data Stewardship                                                                                                  | Stage 5: Review, Optimise & Evolve the Data Foundation                                                                                                                                                       |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Stage Description    | This stage develops a clear understanding of the current data estate, including how data is created, stored, integrated, and used across systems. | This stage defines the business-aligned data architecture required to support consistency, governance, and sustainable insight generation across Microsoft technologies. | This stage implements the architectural designs within Microsoft data services, enabling consistent data structures, metadata alignment, and platform capability. | This stage ensures governance structures, data quality expectations, and stewardship responsibilities are understood, adopted, and applied consistently. | This stage evaluates how well the data foundation is performing, identifies areas for improvement, and ensures the architecture evolves in line with organisational needs and Microsoft platform capability. |
| Purpose of the Stage | To establish a validated baseline that informs strategic direction, architectural design, and modernisation priorities.                           | To create the architectural and governance framework that guides how data is structured, modelled, defined, and maintained across the organisation.                      | To operationalise the data architecture through structured and governed implementation across Azure and Microsoft Fabric.                                         | To sustain architectural clarity and maintain trust in organisational data over time.                                                                    | To maintain a relevant, efficient, and scalable data foundation that supports future Insightful Business capabilities.                                                                                       |
| Activities Included  | Assessing data sources across Azure, Fabric, Dataverse, Dynamics 365, Power Platform, SQL, and M365                                               | Establishing enterprise data principles and modelling standards<br><br>Designing logical and physical data architectures                                                 | Configuring and enabling foundational Azure or Fabric data platform components<br><br>Applying data models to Lakehouses,                                         | Establishing stewardship responsibilities across business domains<br><br>Implementing reference data structures and management processes                 | Reviewing data platform performance, structure, and compliance<br><br>Optimising storage, compute, data flows,                                                                                               |

|                           |                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                              |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                           | <p>Reviewing current data models, metadata, lineage, and catalogue structures</p> <p>Identifying duplication, inconsistencies, and architecture gaps</p> <p>Evaluating data quality, ownership, stewardship, and governance maturity</p> <p>Understanding organisational drivers, future needs, and regulatory expectations</p> | <p>Defining business-aligned data domains and entity relationships</p> <p>Setting up governance structures, roles, responsibilities, and decision pathways</p> <p>Designing hybrid data architectures where cloud and on-premises data must coexist</p> | <p>Warehouses, SQL services, or Dataverse</p> <p>Implementing metadata capture, lineage tracking, and catalogue entries</p> <p>Deploying Master Data Management structures, rules, and hierarchies</p> <p>Aligning upstream application data to foundational structures</p> | <p>Embedding MDM rules, approvals, and golden record management</p> <p>Supporting governance routines, decision forums, and approval pathways</p> <p>Providing guidance to ensure metadata and lineage remain accurate</p> | <p>and transformation pipelines</p> <p>Assessing architecture alignment with business meaning and domain definitions</p> <p>Refreshing models, lineage, governance practices, and cataloguing</p> <p>Updating roadmaps based on technology evolution or new requirements</p> |
| <b>What This Provides</b> | A clear, evidence-based view of the current data landscape and the strategic drivers shaping the required data foundation.                                                                                                                                                                                                      | A coherent and governed foundation that directs how data should be organised, related, and controlled across Microsoft platforms.                                                                                                                       | A functioning Microsoft data platform foundation that reflects the designed architecture and supports reliable data usage.                                                                                                                                                  | A sustainable governance model that maintains clarity, ownership, and data quality across the Microsoft data estate.                                                                                                       | Continuous improvement of the Microsoft data estate, ensuring it remains aligned, optimised, and ready for strategic insight initiatives.                                                                                                                                    |

## Service-Level Benefits

The key business-level benefits of the service are:

- Strengthens internal data architecture capability.
- Improves confidence in managing data platforms.
- Increases stewardship knowledge and competence.
- Enhances engineers' foundational data skills.
- Builds sustainable internal data capability.
- Improves understanding of data structures.
- Supports consistent governance adoption.
- Reduces reliance on external specialists.
- Enables informed, accountable data decisions.
- Improves organisational readiness for future analytics.

## Service Scope

### In-Scope Summary

The Data Foundation & Architecture Service Stream covers the definition, design, and implementation of the core structures, models, and architectural components that underpin responsible and reliable data use.

The service focuses on establishing a coherent data estate, strengthening data governance foundations, and enabling internal teams to maintain and evolve these structures over time. Work in scope is limited to platform-agnostic data architecture and foundational design, ensuring all outputs support sustainable capability development.

| Theme                                        | Description                                                                                                       |
|----------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| Data Architecture Standards and Principles   | Definition of architectural models, conventions, and platform-agnostic standards for data structures.             |
| Data Estate Assessment and Direction         | Analysis of existing data estate, identification of gaps, and definition of foundational architectural direction. |
| Foundational Data Model Design               | Creation of logical and physical data models, metadata structures, and associated documentation.                  |
| Cloud and Hybrid Data Platform Foundations   | Design and implementation of base data platform components across Azure or hybrid environments.                   |
| Metadata, Lineage, and Catalogue Foundations | Enablement of catalogue tooling and metadata structures supporting governance and stewardship.                    |

|                                           |                                                                                                                |
|-------------------------------------------|----------------------------------------------------------------------------------------------------------------|
| Master and Reference Data Foundations     | Establishment of baseline structures for managing core organisational data and shared datasets.                |
| Foundational Governance Alignment         | Definition of architectural governance rules, stewardship alignment, and platform-level compliance structures. |
| Performance and Storage Pattern Design    | Creation of foundational design patterns for storage, optimisation, and performance alignment.                 |
| Foundation-Level Assurance and Validation | Validation of platform behaviour, data structures, governance alignment, and operational readiness.            |
| <b>Embedded Knowledge Transfer</b>        | Continuous capability uplift for data owners, stewards, engineers, and analysts throughout delivery.           |

## Out-of-Scope Summary

The service does not include activities that extend beyond foundational architecture and structural data capability. Exclusions focus on avoiding overlap with downstream analytics, engineering, operational, or application-focused functions. These boundaries ensure the service remains focused on establishing the core architectural foundations and enabling internal teams to build on those structures responsibly.

| Exclusion                                     | Description                                                                             |
|-----------------------------------------------|-----------------------------------------------------------------------------------------|
| Application-Level Data Modelling              | No creation of application-specific schemas, reporting datasets, or BI-semantic models. |
| Analytical Reporting or Dashboard Development | No development of dashboards, reports, visualisations, KPIs, or insight products.       |
| Operational Data Pipeline Development         | No ingestion, transformation, or ETL/ELT pipeline build beyond foundational structures. |
| Data Quality Remediation Activities           | No cleansing, correction, or fixing of legacy data issues or records.                   |
| Ongoing Platform Operations                   | No day-to-day operational support, monitoring, or platform administration.              |
| Advanced Analytics or Data Science            | No machine learning models, predictive analytics, or automation solutions.              |

|                                               |                                                                                                  |
|-----------------------------------------------|--------------------------------------------------------------------------------------------------|
| Detailed Application or Workload Migration    | No migration of full application datasets, workloads, or legacy systems.                         |
| Security Operations and Monitoring            | No SIEM, threat detection, SOC functions, or security event management.                          |
| FinOps or Cost Management                     | No ongoing cloud cost optimisation or consumption monitoring.                                    |
| Large-Scale Refactoring of Existing Platforms | No major redesign or redevelopment of legacy systems beyond foundational architectural guidance. |

# Service Element: Data Strategy and Roadmap Design

## Description

The Data Strategy and Roadmap Design Service Element defines the organisation's data vision, operating model, and structured plan for strengthening data capability. It provides clarity on how data supports organisational priorities, how responsibilities are assigned, and how foundational capability should evolve over time.

The service establishes the direction that guides all future data activity, ensuring work is aligned to strategic objectives and the principles of The Intelligent Business. It gives leaders and data teams a clear, actionable pathway for improving maturity, strengthening governance, and building sustainable internal capability.

## Deliverables

| Deliverable                          | Description                                                                           |
|--------------------------------------|---------------------------------------------------------------------------------------|
| Data Vision and Strategic Principles | Clear articulation of how data supports organisational priorities and outcomes.       |
| Current State Maturity Assessment    | Analysis of existing capability, strengths, gaps, and constraints.                    |
| Future State Data Operating Model    | Definition of roles, responsibilities, workflows, and decision pathways.              |
| Strategic Capability Requirements    | Identification of the capability areas required to achieve the future state.          |
| Prioritised Roadmap                  | A phased, structured roadmap aligned to business objectives and resource constraints. |
| Governance Alignment Summary         | High-level direction for stewardship, ownership, and governance expectations.         |
| Technology Consideration Guidance    | Strategic recommendations to inform future architectural and platform decisions.      |
| Business Case Inputs                 | Supporting inputs that help justify future investment and capability development.     |
| Stakeholder Engagement Summary       | Consolidated overview of findings, agreements, and decision points.                   |
| Knowledge Transfer Sessions          | Collaborative reviews to support understanding and internal adoption.                 |

## Dependencies

Delivery of this Service Element requires:

- Access to organisational strategies, priorities, and relevant business plans.
- Availability of data owners, stewards, analysts, and technical stakeholders.
- Visibility of existing data processes, platforms, and governance arrangements.

- Access to documentation on current technology, policies, and data practices.

## Constraints

This Service Element is subject to the following constraints:

- Roadmap accuracy depends on the quality and completeness of available information.
- Limited stakeholder availability may delay validation of strategic decisions.
- The service does not conduct detailed technical assessments beyond what is required for directional planning.

## Benefits

This Service Element strengthens The Intelligent Business by providing a clear, structured direction for how data should be governed, managed, and used. It improves organisational clarity, reduces uncertainty around responsibility, and ensures investment and activity align to defined outcomes.

By establishing a coherent strategy and roadmap, the service supports responsible decision-making, reinforces accountability, and positions the organisation to develop sustainable data capability. It enables internal teams to progress with confidence, guided by an agreed and transparent plan for strengthening the data estate.

## 848 Responsibilities

Under this Service Element, 848 will:

- Conduct assessments and engage relevant stakeholders.
- Define the data vision, principles, and strategic direction.
- Develop the operating model and capability requirements.
- Produce a phased, prioritised roadmap aligned to organisational objectives.
- Provide strategic recommendations on governance and platform direction.
- Deliver knowledge transfer to support understanding and adoption.
- Ensure all outputs align with The Insightful Business and The Intelligent Business Framework.

## Customer Responsibilities

The customer must:

- Provide access to stakeholders, documentation, and existing data materials.
- Communicate organisational priorities, constraints, and strategic drivers.
- Validate the proposed direction, model, and roadmap.
- Provide feedback and confirm ownership of defined responsibilities.
- Support participation from data, governance, and technical teams.

## Assumptions

This Service Element is delivered on the basis that:

- Organisational strategies and objectives are available for review.
- Internal teams participate in workshops and validation sessions.
- Current data structures and processes can be reviewed at a high level.
- Roadmap activities are adopted and owned by the customer once delivered.

## Exclusions

This Service Element does not include:

- Detailed technical solution design or data modelling.
- Implementation of platforms, tooling, or governance processes.
- Development of operating procedures, policies, or stewardship workflows.
- Creation of dashboards, analytical outputs, KPIs, or reports.
- Data migration, integration, or transformation activity.
- Remediation of existing data quality issues.

## Success Measures

This Service Element is successfully delivered when:

- The data vision and strategic principles are agreed.
- The operating model and capability requirements are approved.
- The roadmap is validated and adopted by stakeholders.
- Strategic recommendations are understood and accepted.
- Knowledge transfer sessions are completed.
- Customer stakeholders confirm readiness to proceed with roadmap activities.

# Service Element: Data Estate Modernisation Assessment

## Description

The Data Estate Modernisation Assessment evaluates the organisation's existing data platforms, structures, integrations, and operating practices to identify opportunities for consolidation, migration, and improvement.

It provides a clear view of the current estate, highlighting issues that limit reliability, scalability, and insight generation. The assessment also examines the skills, capacity, and capability of internal teams to determine the organisation's readiness for modern data platforms and methods.

The service provides actionable recommendations and prioritised modernisation options that support responsible, sustainable improvement aligned to The Insightful Business and The Intelligent Business Framework.

## Deliverables

| Deliverable                                | Description                                                                |
|--------------------------------------------|----------------------------------------------------------------------------|
| Current State Estate Review                | Assessment of existing data systems, structures, and integration methods.  |
| Legacy System Analysis                     | Identification of outdated, redundant, or high-risk data platforms.        |
| Consolidation Opportunity Report           | Recommendations for simplifying or reducing system sprawl.                 |
| Modernisation Options Assessment           | Options for migration, redesign, replacement, or optimisation.             |
| Skills and Capability Gap Review           | Analysis of team capability, capacity, and readiness for modern platforms. |
| Platform Performance and Efficiency Review | High-level assessment of cost, performance, and structural efficiency.     |
| Data Architecture Alignment Summary        | Review of alignment to foundational data architecture principles.          |
| Prioritised Modernisation Recommendations  | Ranked improvement actions with rationale and expected outcomes.           |
| Organisational Readiness Assessment        | Evaluation of the organisation's ability to adopt modernised platforms.    |
| Stakeholder                                | Consolidated review of findings to support understanding and next          |

|                                         |        |
|-----------------------------------------|--------|
| Findings and Knowledge Transfer Session | steps. |
|-----------------------------------------|--------|

## Dependencies

Delivery of this Service Element requires:

- Access to existing data systems, documentation, and platform information.
- Availability of data owners, stewards, engineers, and analysts.
- Visibility of existing governance structures, processes, and standards.
- Access to subject matter experts for operational and technical insight.

## Constraints

This Service Element is subject to the following constraints:

- Findings depend on the completeness and accuracy of customer-provided information.
- Limited access to systems may constrain depth of assessment.
- Skills assessments rely on stakeholder engagement and available evidence.
- The assessment cannot validate future-state feasibility without subsequent design work.

## Benefits

This Service Element strengthens The Intelligent Business by providing clear visibility of the current data estate, identifying structural and capability issues that limit reliability and insight.

It improves organisational understanding of modernisation requirements, highlights where risk and inefficiency exist, and clarifies the capability uplift needed for sustainable progress.

By combining estate assessment with skills gap analysis, the service ensures future data investments are aligned to internal capacity, governance expectations, and long-term organisational objectives.

It enables leaders and teams to make informed decisions with a full understanding of their current state and readiness for change.

## 848 Responsibilities

Under this Service Element, 848 will:

- Conduct assessments of data platforms, structures, and integrations.
- Review legacy and modern systems to identify risks and limitations.
- Analyse internal capability, skills, and readiness for modernisation.
- Provide consolidation, migration, and optimisation recommendations.
- Produce clear, prioritised findings aligned to customer objectives.

- Deliver knowledge transfer sessions to support understanding and adoption.
- Align all outputs to The Insightful Business and The Intelligent Business Framework.

## Customer Responsibilities

The customer must:

- Provide access to relevant systems, documentation, and internal subject matter experts.
- Participate in capability and skills assessment activities.
- Validate findings and contribute organisational context.
- Confirm readiness to progress with modernisation recommendations.
- Review and approve prioritised recommendations.

## Assumptions

This Service Element is delivered on the basis that:

- Requested information and system access will be available in reasonable timeframes.
- Stakeholders participate in interviews, workshops, and skills assessments.
- Internal teams can provide insight into current operational challenges.
- Legacy system constraints can be reviewed at an appropriate level of detail.

## Exclusions

This Service Element does not include:

- Implementation of modernisation recommendations.
- Detailed target-state architecture design or platform configuration.
- Development of pipelines, models, or ingestion patterns.
- Data quality remediation or cleansing activities.
- Decommissioning, consolidation, or migration execution.
- Creation of dashboards, datasets, or analytical products.
- Governance policy creation or operational governance rollout.

## Success Measures

This Service Element is successfully delivered when:

- The current state of the data estate is clearly documented.
- Skills and capability gaps are understood and agreed.
- Modernisation opportunities and risks are clearly articulated.

- Prioritised recommendations are validated by stakeholders.
- Organisational readiness is assessed and accepted.
- Knowledge transfer sessions are completed.
- Customer stakeholders confirm readiness to progress with next-stage activities.

# Service Element: Data Architecture Governance Framework

## Description

The Data Architecture Governance Framework Definition service establishes the standards, ownership structures, and decision-making processes that guide how data architecture is designed, approved, and maintained across the organisation.

It provides the rules and governance models required to ensure architectural decisions are consistent, traceable, and aligned to organisational priorities.

The service clarifies responsibilities across roles, defines the forums where architectural decisions are made, and sets the principles that underpin sustainable, well-managed data architecture.

It enables the organisation to govern its data estate responsibly and supports the long-term development of internal capability.

## Deliverables

| Deliverable                            | Description                                                                        |
|----------------------------------------|------------------------------------------------------------------------------------|
| Architectural Principles and Standards | Defined rules guiding modelling, integration, storage, and platform design.        |
| Decision-Making and Approval Framework | Governance pathways showing how architectural decisions progress and are approved. |
| Role and Responsibility Definitions    | Clear ownership across Architects, Data Owners, Stewards, and Engineering roles.   |
| Architecture Review Board Model        | Structure, purpose, and operation of architectural decision forums.                |
| Governance Workflow Definitions        | Documentation showing how decisions, changes, and exceptions are handled.          |
| Architectural Guardrails               | Boundaries and constraints that guide solution and design decisions.               |
| Architectural Compliance Expectations  | High-level requirements for alignment, documentation, and audit.                   |
| Governance Artefact Templates          | Templates for recording architectural decisions, rationale, and design summaries.  |
| Integration with Existing Governance   | Alignment to organisational governance or oversight groups.                        |

|                             |                                                                          |
|-----------------------------|--------------------------------------------------------------------------|
| Structures                  |                                                                          |
| Knowledge Transfer Sessions | Support for internal understanding and adoption of governance processes. |

## Dependencies

Delivery of this Service Element requires:

- Access to organisational strategies, governance structures, and operating models.
- Engagement with Data Architects, Data Owners, Stewards, and engineering leadership.
- Visibility of existing design practices and decision-making processes.
- Availability of current architectural documentation, where it exists.

## Constraints

This Service Element is subject to the following constraints:

- Effectiveness depends on participation from key stakeholders.
- Existing governance models may need refinement to align with architectural needs.
- Adoption relies on internal agreement of responsibilities and decision authority.

## Benefits

This Service Element strengthens The Intelligent Business by creating a coherent, predictable approach to data architectural decision-making. It reduces ambiguity, improves accountability, and ensures architectural choices support organisational priorities and Insightful Business objectives.

By defining clear roles, forums, and standards, the framework enables consistent structures that support reliable data use, improved stewardship, and sustainable capability growth. It gives teams confidence that architectural decisions are governed responsibly and transparently, improving alignment, reducing risk, and supporting long-term organisational maturity.

## 848 Responsibilities

Under this Service Element, 848 will:

- Develop architectural standards, principles, and governance structures.
- Define roles, responsibilities, and decision pathways.
- Produce governance documentation and artefact templates.
- Align the framework with existing organisational governance structures.
- Facilitate workshops with key stakeholders.
- Deliver knowledge transfer to support internal adoption.
- Ensure all outputs align to The Insightful Business and The Intelligent Business Framework.

## Customer Responsibilities

The customer must:

- Provide access to governance bodies, architectural stakeholders, and key decision-makers.
- Supply existing governance materials, policies, and organisational context.
- Validate proposed governance structures and responsibilities.
- Confirm ownership of governance roles and processes.
- Support adoption across data and engineering teams.

## Assumptions

This Service Element is delivered on the basis that:

- Governance stakeholders participate in workshops and reviews.
- Existing organisational priorities are documented and accessible.
- Internal teams can provide insight into current architectural processes.
- Governance responsibilities will be owned by the customer following handover.

## Exclusions

This Service Element does not include:

- Development of detailed data models or platform designs.
- Operational data governance policies or quality rules.
- Implementation of governance tooling or catalogue platforms.
- Day-to-day governance operations or chairing of architecture boards.
- Solution design, system configuration, or technical implementation activities.
- Remediation of architectural or structural issues identified during the review.

## Success Measures

This Service Element is successfully delivered when:

- Architectural principles and standards are documented and approved.
- Governance structures, roles, and decision pathways are agreed.
- Architectural review and approval workflows are defined.
- Artefact templates and guardrails are completed.
- Knowledge transfer sessions are delivered.
- Customer stakeholders confirm readiness to operate the governance framework.

# Service Element: Cloud Data Platform Implementation (Azure/Fabric)

## Description

The Cloud Data Platform Implementation service designs and deploys the foundational cloud data environment required to support modern data storage, processing, and governance.

The service establishes the core Azure or Microsoft Fabric components that provide a secure, scalable, and structured platform for future ingestion, modelling, and analytical work. It ensures the platform is aligned to organisational architecture principles, governance expectations, and cloud landing zone standards.

The service prepares the organisation for modern data capability by delivering a well-structured, fully deployable platform foundation that internal teams can operate and extend with confidence.

## Deliverables

| Deliverable                              | Description                                                                                        |
|------------------------------------------|----------------------------------------------------------------------------------------------------|
| Platform Architecture Alignment          | Validation that platform deployment aligns to architectural guardrails and governance principles.  |
| Cloud Data Platform Deployment           | Deployment of Azure or Fabric components required for core data storage and processing.            |
| Resource Structure and Environment Setup | Defined resource hierarchy, workspaces, capacities, and environment configurations.                |
| Storage and Lakehouse Foundations        | Creation of base storage layers (e.g., ADLS, Fabric Lakehouse) aligned to architectural patterns.  |
| Security and Access Configuration        | Platform-level identity, access, and permission structures aligned to customer policies.           |
| Metadata and Catalogue Integration Setup | Connection of platform resources to metadata/catalogue tooling where required.                     |
| Platform Configuration Documentation     | Documentation covering platform structures, configuration decisions, and operational expectations. |

|                                |                                                                                   |
|--------------------------------|-----------------------------------------------------------------------------------|
| Operational Handover Materials | Materials enabling internal teams to support day-to-day platform operations.      |
| Implementation Validation Pack | Confirmation that the platform behaves as expected and meets design requirements. |
| Knowledge Transfer Sessions    | Hands-on sessions supporting platform ownership and capability uplift.            |

## Dependencies

Delivery of this Service Element requires:

- A deployed Azure landing zone or Fabric tenant with appropriate access and policies.
- Validated architectural designs from earlier service elements (strategic and structural).
- Customer identity, network, and governance structures available for alignment.
- Access to required subscriptions, capacities, and resource groups.
- Availability of data engineers, architects, and platform administrators for engagement.

## Constraints

This Service Element is subject to the following constraints:

- Deployment scope may be limited by tenant configuration, licensing, or policy restrictions.
- Platform performance depends on customer-provided capacity, resource hierarchy, and cloud limits.
- Implementation cannot begin without validated architecture and landing zone readiness.
- Some services may require manual configuration where IaC is not supported.
- Microsoft Fabric capabilities may vary by region and licensing.

## Benefits

This Service Element strengthens The Intelligent Business by providing a secure, scalable, and well-structured foundation for data use across the organisation. It reduces technical complexity, ensures alignment with architectural principles, and positions the organisation to adopt modern data practices with confidence.

By establishing a governed cloud platform, the service improves reliability, supports consistent data structures, and enables internal teams to build sustainable capability. It prepares the organisation for evidence-based decision-making by delivering the core environment required for ingestion, modelling, governance, and insight generation.

## 848 Responsibilities

Under this Service Element, 848 will:

- Validate architectural assumptions and platform design.
- Deploy Azure or Fabric data platform components according to agreed patterns.
- Configure platform-level identity, access, and security structures.
- Establish storage, workspace, capacity, and environment foundations.
- Integrate metadata and governance tooling where required.
- Document platform configuration and operational expectations.
- Deliver knowledge transfer to support internal operation and future development.
- Ensure all work aligns to The Insightful Business and The Intelligent Business Framework.

## Customer Responsibilities

The customer must:

- Provide access to Azure or Fabric environments, subscriptions, and resource hierarchies.
- Confirm architectural designs, platform boundaries, and governance expectations.
- Validate configuration decisions and platform structures.
- Manage licensing and capacity requirements for Azure or Fabric services.
- Support involvement from identity, security, and network stakeholders.
- Own and operate the platform following handover unless supported by a managed service.

## Assumptions

This Service Element is delivered on the basis that:

- The cloud landing zone or Fabric tenant is deployed, stable, and ready for use.
- Architectural patterns and requirements have been defined and approved.
- Customer identity and governance structures are available for alignment.
- Required permissions for deployment and configuration are granted.
- Internal teams will take ownership of daily operations after handover.

## Exclusions

This Service Element does not include:

- Development of ingestion pipelines or transformation logic.

- Data modelling, Lakehouse schema design, or semantic layer creation.
- Migration of existing data or consolidation of legacy systems.
- Detailed governance policy creation or operational governance rollout.
- Ongoing platform management, monitoring, or support.
- Implementation of non-Azure cloud platforms or on-premises systems.
- Security operations, SOC integration, or threat monitoring configuration.

## Success Measures

This Service Element is successfully delivered when:

- Cloud data platform components are deployed and validated.
- Platform configuration aligns with architectural and governance requirements.
- Identity, access, and security structures function as expected.
- Platform documentation and handover materials are completed.
- Knowledge transfer sessions are delivered to internal teams.
- Customer stakeholders confirm readiness to operate and extend the platform.

# Service Element: Hybrid Data Architecture Design

## Description

The Hybrid Data Architecture Design service defines how the organisation's on-premise and cloud data environments operate as a unified, coherent data estate. It establishes the end-to-end architectural patterns needed to ensure data moves securely, predictably, and consistently across systems and platforms.

The service aligns legacy system constraints with cloud capabilities and provides structures that support phased modernisation while maintaining operational continuity. It enables the organisation to adopt Azure and Microsoft Fabric capabilities responsibly, without disrupting existing on-premise systems or introducing architectural drift.

The outcome is a clear hybrid architecture that supports sustainable insight, controlled evolution, and long-term operational alignment.

## Deliverables

| Deliverable                             | Description                                                                          |
|-----------------------------------------|--------------------------------------------------------------------------------------|
| Hybrid Architecture Blueprint           | End-to-end design showing how on-premise and cloud environments work together.       |
| Data Flow and Integration Patterns      | Defined patterns for point-to-point, event-based, and batch data movement.           |
| Storage and Processing Architecture     | Design for on-premise stores, cloud lakes, Fabric components, and processing layers. |
| Security and Access Alignment           | Defined access, identity, and boundary controls across hybrid environments.          |
| Connectivity and Network Considerations | High-level connectivity models aligned to customer network architecture.             |
| Transitional and Future-State Models    | Designs showing phased modernisation options and migration pathways.                 |
| Hybrid Governance Alignment Summary     | Structural guidance ensuring hybrid designs support architectural governance.        |
| Integration Boundary Definitions        | Clear delineation of cloud and on-prem responsibilities and system interfaces.       |

|                                            |                                                                             |
|--------------------------------------------|-----------------------------------------------------------------------------|
| Technical Assumptions and Design Rationale | Documented reasoning behind architectural decisions and patterns.           |
| Knowledge Transfer Sessions                | Reviews and design walkthroughs supporting internal capability development. |

## Dependencies

Delivery of this Service Element requires:

- Access to information on on-premise platforms, databases, applications, and integrations.
- Visibility of existing cloud environments, landing zones, and governance structures.
- Engagement with network, security, and identity teams.
- Availability of internal data architects, engineers, and system owners.
- Access to design materials or documentation for legacy systems where available.

## Constraints

This Service Element is subject to the following constraints:

- Legacy systems may impose limitations that restrict architectural options.
- Network or identity constraints may influence feasible hybrid patterns.
- Hybrid designs rely on accurate information about existing platforms.
- Transitional models require organisational agreement to proceed.
- Fabric or Azure capabilities may vary depending on licensing and region.

## Benefits

This Service Element strengthens The Intelligent Business by providing a coherent architecture that supports reliable data movement and consistent insight across mixed environments. It reduces fragmentation, aligns legacy and modern platforms, and ensures architectural decisions support organisational priorities.

The service enables safe adoption of cloud capability, supports progressive modernisation, and provides a structured pathway for reducing technical debt over time. By establishing a unified hybrid architecture, the organisation gains predictability, governance alignment, and the foundations needed for sustainable data capability and informed decision-making.

## 848 Responsibilities

Under this Service Element, 848 will:

- Assess existing on-premise and cloud environments.
- Gather architectural, operational, and governance requirements.

- Design hybrid patterns for storage, processing, and integration.
- Define security, identity, and access models across hybrid boundaries.
- Produce transitional and future-state architecture models.
- Document design decisions and supporting rationale.
- Deliver knowledge transfer to support internal adoption and ongoing use.
- Ensure all outputs align to The Insightful Business and The Intelligent Business Framework.

## Customer Responsibilities

The customer must:

- Provide access to system documentation and platform stakeholders.
- Confirm architectural, regulatory, and security requirements.
- Validate hybrid design decisions and boundary definitions.
- Support engagement from on-premise and cloud technical teams.
- Approve transitional and target-state models.

## Assumptions

This Service Element is delivered on the basis that:

- On-premise and cloud environments are available for review.
- Internal teams can describe current system behaviours and constraints.
- Network and security requirements are accessible and documented.
- Customer cloud foundations and governance models exist or are in progress.
- The organisation intends to maintain or migrate hybrid workloads.

## Exclusions

This Service Element does not include:

- Implementation or deployment of hybrid integrations or pipelines.
- Migration of data, workloads, or systems.
- Detailed modelling of individual datasets or schemas.
- Operational governance rollout or policy creation.
- Cloud landing zone deployment or network engineering.
- Ongoing operations, maintenance, or monitoring.
- Development of analytics, BI models, or dashboards.

- Security operations, SIEM integration, or threat monitoring.

## Success Measures

This Service Element is successfully delivered when:

- The hybrid architecture blueprint is approved.
- Integration, storage, and processing patterns are validated.
- Security and identity alignment is confirmed.
- Transitional and future-state models are accepted by stakeholders.
- Documentation and rationale are completed.
- Knowledge transfer sessions are delivered.
- Customer stakeholders confirm readiness to adopt the hybrid architecture.

# Service Element: Reference Data Management Setup

## Description

The Reference Data Management Setup service establishes the structures, governance alignment, and distribution patterns required to maintain consistent reference data across the organisation.

Reference data includes controlled vocabularies, codes, and classification values used by multiple systems, processes, and analytical models. This service designs and implements the foundational components needed to store, manage, and distribute reference data using Microsoft Fabric for platform storage and Microsoft Purview for metadata and stewardship alignment.

It supports clarity, consistency, and operational reliability by ensuring reference data is standardised, governed, and accessible. The service also uplifts internal capability so reference datasets can be maintained and evolved with confidence.

## Deliverables

| Deliverable                                 | Description                                                                                    |
|---------------------------------------------|------------------------------------------------------------------------------------------------|
| Reference Data Domain Definitions           | Agreed definitions and boundaries for reference datasets and value lists.                      |
| Reference Data Structures                   | Fabric Lakehouse or Warehouse structures for hosting controlled lists and values.              |
| Governance and Ownership Alignment          | Assigned owners, stewards, and responsibilities for reference data domains.                    |
| Purview Glossary and Metadata Alignment     | Alignment of reference domains to glossary terms, metadata, and lineage structures.            |
| Versioning and Change Control Approach      | Defined process for updates, validation, review, and controlled release of changes.            |
| Reference Data Distribution Patterns        | Defined approach for making reference datasets available to downstream systems or analytics.   |
| Validation and Quality Rules (Foundational) | Basic rules ensuring consistency and structural integrity (not full data quality remediation). |
| Operational Reference Data Guide            | Documentation covering structure, ownership, maintenance steps, and update processes.          |

|                             |                                                                                  |
|-----------------------------|----------------------------------------------------------------------------------|
| Reference Data Example Sets | Initial population of reference structures using provided values.                |
| Knowledge Transfer Sessions | Training for Data Owners, Stewards, and Engineers on management and maintenance. |

## Dependencies

Delivery of this Service Element requires:

- Availability of business definitions and existing reference datasets.
- Engagement from Data Owners, Stewards, and subject matter experts.
- Access to Fabric environments for hosting reference data structures.
- Purview availability for glossary and metadata alignment.
- Customer agreement on ownership and update responsibilities.

## Constraints

This Service Element is subject to the following constraints:

- Reference data accuracy depends on customer-provided lists and definitions.
- Legacy systems may use incompatible reference structures requiring staged adoption.
- Purview glossary and stewardship assignments require customer validation.
- Distribution patterns may be limited by system integration capabilities.

## Benefits

This Service Element strengthens The Intelligent Business by improving consistency and reducing ambiguity in how reference values are defined and used across the organisation. Standardised reference data supports clearer communication between systems, improves the accuracy of reporting and analytics, and reduces rework caused by inconsistent or conflicting values.

By providing clear ownership and governance alignment, the service strengthens accountability and improves stewardship capability. The outcome is a more reliable data environment where operational and analytical processes depend on shared, trusted reference values.

## 848 Responsibilities

Under this Service Element, 848 will:

- Define reference data domains and establish structural patterns.
- Create and configure reference data tables in Fabric.
- Align reference domains to Purview glossary and metadata structures.
- Establish versioning, ownership, and change control patterns.

- Implement distribution patterns for downstream consumption where required.
- Provide documentation covering structures, processes, and responsibilities.
- Deliver knowledge transfer to responsibility holders and operational teams.
- Ensure all outputs align to The Insightful Business and The Intelligent Business Framework.

## Customer Responsibilities

The customer must:

- Provide existing reference datasets, business rules, and validation criteria.
- Assign Data Owners and Stewards for each reference domain.
- Validate definitions, structures, and governance assignments.
- Confirm distribution requirements and system dependencies.
- Maintain and update reference datasets after handover unless supported by managed services.

## Assumptions

This Service Element is delivered on the basis that:

- Reference data lists are available and can be provided by the customer.
- Fabric and Purview are deployed and available.
- Governance roles are defined or in progress.
- Internal teams participate actively in validation and knowledge transfer.

## Exclusions

This Service Element does not include:

- Full data quality remediation of legacy datasets.
- Creation of MDM domains, matching logic, or survivorship rules.
- Engineering or ingestion pipelines for non-reference data.
- Application reconfiguration to align internal lookup structures.
- Development of BI models, dashboards, or analytical outputs.
- Ongoing operational maintenance or reference data stewardship.

## Success Measures

This Service Element is successfully delivered when:

- Reference data structures and domains are defined and documented.
- Reference datasets are created and aligned with governance expectations.

- Purview glossary and stewardship alignment is validated.
- Versioning, update, and change control processes are agreed.
- Distribution patterns function as expected.
- Knowledge transfer sessions are delivered.
- Customer stakeholders confirm readiness to manage and maintain reference data.

# Service Element: Metadata and Data Catalogue Enablement

## Description

The Metadata and Data Catalogue Enablement service deploys and configures Microsoft Purview (or an equivalent catalogue platform) to provide clear visibility, traceability, and understanding of the organisation's data estate.

It establishes the structures required for data discovery, metadata management, lineage tracking, and stewardship alignment across cloud, on-premise, and hybrid environments. The service configures catalogue components, enables metadata harvesting, and aligns Purview with organisational data domains and governance expectations.

It strengthens architectural clarity, improves stewardship capability, and provides internal teams with a sustainable foundation for managing and governing metadata over time.

## Deliverables

| Deliverable                             | Description                                                                                      |
|-----------------------------------------|--------------------------------------------------------------------------------------------------|
| Purview Environment Deployment          | Initial setup and configuration of Purview collections, access, and governance boundaries.       |
| Metadata Source Integration             | Configuration of scanning connections to Azure, Fabric, on-premise, and hybrid systems.          |
| Automated Metadata Harvesting           | Setup of scan rules, schedules, and metadata extraction for aligned sources.                     |
| Data Lineage Enablement                 | Configuration of lineage capture across ingestion, transformation, and consumption layers.       |
| Glossary and Domain Structure Setup     | Establishment of business terms, domain structures, and stewardship assignments.                 |
| Classification and Sensitivity Setup    | Activation of classification rules and sensitivity tagging structures.                           |
| Catalogue Access and Role Configuration | Role-based access for Data Owners, Stewards, Analysts, and Engineers.                            |
| Metadata Governance Alignment Pack      | Structural documentation describing metadata models, lineage patterns, and glossary conventions. |

|                                |                                                                                                  |
|--------------------------------|--------------------------------------------------------------------------------------------------|
| Catalogue Administration Guide | Documentation describing ongoing management, scanning, and stewardship processes.                |
| Knowledge Transfer Sessions    | Training sessions covering catalogue operation, metadata management, and lineage interpretation. |

## Dependencies

Delivery of this Service Element requires:

- Availability of Purview and required Azure resources.
- Customer identity, network, and security configurations to support scanning.
- Access to source systems for metadata harvesting.
- Engagement from Data Owners, Stewards, Architects, and engineering teams.
- Existing glossary or domain definitions where applicable.

## Constraints

This Service Element is subject to the following constraints:

- Lineage and metadata completeness depend on the capabilities of connected systems.
- Some legacy or proprietary systems may require limited or manual metadata capture.
- Purview functionality varies by licence and tenant configuration.
- Accurate glossary alignment requires active customer validation.
- Hybrid connectivity may depend on self-hosted integration runtimes.

## Benefits

This Service Element strengthens The Intelligent Business by providing clarity and transparency across the data estate. It improves understanding of how data flows through systems, strengthens accountability for ownership, and enables responsible use of data through clear metadata structures and lineage visibility.

By implementing a consistent catalogue and glossary, the service reduces ambiguity, supports stewardship activities, and enables informed decision-making. The organisation benefits from improved structural insight, more predictable data behaviour, and the foundations needed for sustainable data governance and analytics capability.

## 848 Responsibilities

Under this Service Element, 848 will:

- Deploy and configure the Purview environment.
- Integrate Purview with cloud, hybrid, and on-premise data sources.

- Enable metadata harvesting and lineage capture.
- Establish glossary, domain structures, and initial classifications.
- Document catalogue models, metadata structures, and access patterns.
- Deliver training to support internal adoption and capability uplift.
- Align all work to the Insightful Business and the Intelligent Business Framework.

## Customer Responsibilities

The customer must:

- Provide access to source systems, resource groups, and platform stakeholders.
- Validate glossary terms, metadata structures, and domain assignments.
- Supply identity, security, and networking requirements for catalogue integration.
- Participate in knowledge transfer sessions and operational onboarding.
- Maintain the catalogue after handover unless supported by a managed service.

## Assumptions

This Service Element is delivered on the basis that:

- Purview is licensed and available within the customer environment.
- Customer governance roles (Owner, Steward, Architect) are defined or in progress.
- Required network and identity configurations can be aligned to Purview.
- Source systems support metadata extraction through supported connectors.

## Exclusions

This Service Element does not include:

- Creation of enterprise-wide governance policies or stewardship workflows.
- Manual population of detailed business metadata beyond initial structural setup.
- Data quality remediation, cleansing, or record-level corrections.
- Pipeline or ingestion development to support lineage.
- MDM implementation or golden record creation.
- Deployment of non-Microsoft governance tooling unless scoped separately.
- Ongoing catalogue administration or operational management.

## Success Measures

This Service Element is successfully delivered when:

- Purview is deployed and configured as agreed.

- Catalogue connections and metadata scans operate successfully.
- Lineage is visible across agreed datasets and systems.
- Glossary and domain structures are validated by stakeholders.
- Classification and access controls function as expected.
- Documentation and operational materials are complete.
- Knowledge transfer sessions are delivered.
- Customer stakeholders confirm readiness to operate and grow the catalogue.

# Service Element: Master Data Management (MDM) Deployment

## Description

The Master Data Management (MDM) Deployment service implements a fully operational MDM capability using Profisee as the mastering engine, Microsoft Fabric as the platform and consumption layer, and Microsoft Purview as the governance and metadata framework.

The service delivers trusted, consistent, and governed master data across key domains, enabling the organisation to create and manage golden records, apply matching and survivorship rules, and maintain a unified view of core business entities.

It establishes stewardship workflows, integrates mastered data into Fabric, and aligns domains with Purview governance structures. The service strengthens data reliability and prepares the organisation for sustainable insight, operational efficiency, and evidence-based decision-making.

## Deliverables

| Deliverable                               | Description                                                                                                        |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| Profisee Platform Deployment              | Installation and configuration of the Profisee MDM environment aligned to architectural and security requirements. |
| Domain Design Specifications              | Defined structures, attributes, relationships, and governance parameters for mastered domains.                     |
| Matching and Survivorship Rules           | Implemented logic for record matching, deduplication, validation, and golden record creation.                      |
| Stewardship Workflow Configuration        | Operational workflows for steward review, approval, exception handling, and data quality tasks.                    |
| Source System Integration Patterns        | Defined ingestion and synchronisation patterns for required source systems.                                        |
| Fabric Integration Setup                  | Integration of mastered entities into Fabric Lakehouse/Warehouse structures for consumption.                       |
| Purview Alignment and Metadata Enablement | Domain alignment to Purview glossary, lineage, classification, and stewardship models.                             |
| MDM Operational Documentation Pack        | Guidance covering configuration, workflows, rule management, and operational procedures.                           |

|                                              |                                                                                                 |
|----------------------------------------------|-------------------------------------------------------------------------------------------------|
| Domain<br>Deployment<br>Validation Pack      | Testing of domain behaviour, data flow, rules, and workflow accuracy.                           |
| Knowledge<br>Transfer &<br>Capability Uplift | Hands-on training covering platform use, rule management, workflows, and operational ownership. |

## Dependencies

Delivery of this Service Element requires:

- Customer procurement and licensing of Profisee.
- Access to source systems required for domain population.
- Availability of Azure or Fabric environments for integration.
- Purview tenant availability for governance alignment.
- Engagement from Data Owners, Stewards, Architects, and Engineers.
- Validated domain definitions from earlier strategic activities (where applicable).

## Constraints

This Service Element is subject to the following constraints:

- Quality of mastered data depends on source system accuracy.
- Domain complexity may require staged implementation or phased rollout.
- Integration patterns depend on available connectivity, bandwidth, and system interfaces.
- Purview features may vary depending on licensing and tenant configuration.
- Profisee deployment architecture must align to customer security policies.

## Benefits

This Service Element strengthens The Intelligent Business by creating a trusted foundation of core business data, improving clarity, consistency, and operational reliability. Mastered data reduces duplication, supports governance responsibilities, and ensures decisions are based on accurate and reconcilable information.

By embedding stewardship workflows and integrating golden records into Fabric, the service improves transparency, reduces rework, and ensures data flows support organisational objectives. It enables sustainable capability by uplifting internal teams, strengthening ownership, and providing a structured model for managing master data across the organisation.

## 848 Responsibilities

Under this Service Element, 848 will:

- Deploy and configure the Profisee MDM platform.
- Lead domain design and implement matching, validation, and survivorship logic.
- Configure stewardship workflows and domain-level governance structures.
- Establish integration patterns into Fabric and alignment with Purview.
- Create documentation describing platform configuration and operational processes.
- Conduct validation testing for mastered domains.
- Deliver knowledge transfer to support ongoing internal ownership.
- Ensure all outputs align to The Insightful Business and The Intelligent Business Framework.

## Customer Responsibilities

The customer must:

- Provide access to required source systems and associated subject matter experts.
- Supply domain definitions, data samples, and quality context.
- Procure and license Profisee and required cloud services.
- Validate domain structures, rules, and workflows.
- Participate in knowledge transfer, operational training, and acceptance testing.
- Own and maintain mastered data and platform operations post-handover unless supported by managed services.

## Assumptions

This Service Element is delivered on the basis that:

- Profisee licensing and deployment prerequisites are met.
- Fabric and Purview are available and accessible for integration.
- Domain scope is agreed and stable throughout delivery.
- Internal teams participate actively in workflow, rule, and structure validation.
- Customer identity and security requirements are clearly documented.

## Exclusions

This Service Element does not include:

- Enterprise-wide data governance policy development.
- Non-MDM ingestion pipelines, transformations, or data engineering.
- Full migration of legacy systems or datasets.
- Application or ERP refactoring to support MDM integration.

- Development of dashboards, KPIs, analytical models, or BI outputs.
- Ongoing MDM operations, data stewardship services, or platform support.
- Implementation of non-Profisee MDM engines or non-Microsoft data platforms.

## Success Measures

This Service Element is successfully delivered when:

- Profisee is deployed and configured.
- Mastered domains are implemented and validated.
- Matching and survivorship processes function as expected.
- Stewardship workflows operate reliably and support operational needs.
- Fabric and Purview integrations are validated.
- Documentation and operational guidance are completed.
- Knowledge transfer sessions are delivered.
- Customer stakeholders confirm readiness to operate the MDM capability.

# Service Element: Data Storage and Performance Optimisation

## Description

The Data Storage and Performance Optimisation service evaluates and improves how data is stored, accessed, and processed across cloud and hybrid environments. It focuses on tuning Fabric Lakehouse and Warehouse structures, Azure Data Lake configurations, storage patterns, and platform-level pipeline behaviour to support efficient, scalable, and predictable analytical performance.

The service identifies inefficiencies, refines data structures, and recommends configuration changes that improve query speed, reduce unnecessary compute consumption, and optimise storage utilisation. It strengthens the organisation's ability to operate a high-performing and cost-efficient data estate aligned to architectural and governance expectations.

## Deliverables

| Deliverable                                   | Description                                                                         |
|-----------------------------------------------|-------------------------------------------------------------------------------------|
| Storage Structure Assessment                  | Review of Lakehouse, Warehouse, and ADLS structures for efficiency and alignment.   |
| Performance Bottleneck Analysis               | Identification of slow-running queries, workloads, or storage patterns.             |
| Fabric and Azure Capacity Review              | Assessment of compute, storage, and concurrency behaviour.                          |
| Data Layout Optimisation Recommendations      | Improvements to partitioning, indexing, file formats, and compaction.               |
| Pipeline and Job Efficiency Review            | High-level review of platform-level pipeline performance and refresh behaviour.     |
| Cost Efficiency and Resource Usage Report     | Opportunities to reduce unnecessary compute or storage consumption.                 |
| Storage Lifecycle and Tiering Recommendations | Guidance on appropriate retention, tiering, and archival strategies.                |
| Platform-Level Configuration Recommendations  | Adjustments to settings, caching, or compute options to improve performance.        |
| Optimisation Roadmap                          | Prioritised actions with expected impact, dependencies, and recommended sequencing. |

|                            |                                                                               |
|----------------------------|-------------------------------------------------------------------------------|
| Knowledge Transfer Session | Explanation of optimisations, rationale, and ongoing monitoring expectations. |
|----------------------------|-------------------------------------------------------------------------------|

## Dependencies

Delivery of this Service Element requires:

- Access to Fabric, Azure Data Lake, and relevant data warehouse or Lakehouse environments.
- Availability of telemetry, job metrics, query logs, and performance data.
- Engagement with Data Engineers, Platform Administrators, and Architects.
- Access to relevant documentation describing existing structures and processes.
- Customer confirmation of retention, lifecycle, and governance constraints.

## Constraints

This Service Element is subject to the following constraints:

- Optimisation results depend on available platform telemetry and historical performance data.
- Some performance issues may originate from upstream logic outside the scope of this service.
- Legacy file formats or historical structures may limit immediate optimisation potential.
- Certain optimisations may require changes subject to customer governance or security policy approval.
- Fabric capacity or Azure resource limits may restrict achievable performance improvements.

## Benefits

This Service Element strengthens The Intelligent Business by ensuring the organisation's data environment is efficient, reliable, and capable of supporting timely insight. Optimised storage and platform performance reduce delays, minimise operational cost, and improve the responsiveness of analytical workloads. The service strengthens architectural integrity by aligning storage and performance behaviours to defined patterns and governance expectations. It supports confidence in decision-making by improving the speed and reliability with which data can be accessed, queried, and used across the organisation.

## 848 Responsibilities

Under this Service Element, 848 will:

- Analyse storage structures, platform metrics, and usage patterns.
- Identify performance bottlenecks and inefficiencies across Fabric and Azure data environments.

- Recommend improvements to layout, partitioning, indexing, file formats, and lifecycle strategies.
- Provide guidance on platform configurations that support improved performance.
- Produce prioritised actions and optimisation roadmaps.
- Deliver knowledge transfer to support internal capability in monitoring and maintenance.
- Ensure all outputs align to The Insightful Business and The Intelligent Business Framework.

## Customer Responsibilities

The customer must:

- Provide access to relevant environments, telemetry, and platform logs.
- Supply information on retention, governance, and cost constraints.
- Validate optimisation recommendations and approve configuration changes.
- Provide engineering and architecture teams for engagement and knowledge transfer.
- Implement recommended changes if not part of the service scope or follow-on activity.

## Assumptions

This Service Element is delivered on the basis that:

- Platform telemetry and historical performance data are available.
- Fabric and Azure environments are deployed and stable.
- Customer teams participate in validation and knowledge transfer sessions.
- Required permissions for analysis of platform structures are granted.
- Data structures have not been encrypted or restricted in a way that blocks analysis.

## Exclusions

This Service Element does not include:

- Development or redesign of pipelines, transformations, or data engineering logic.
- Creation of new storage structures or complete refactoring of existing data lakes.
- BI optimisation (Power BI models, DAX tuning, semantic model redesign).
- Data quality remediation or cleansing activities.
- Application performance tuning or transactional database optimisation.
- Implementation of recommended changes unless separately scoped.

- Ongoing platform monitoring, performance management, or managed service operations.

## Success Measures

This Service Element is successfully delivered when:

- Storage structures and performance behaviours are assessed and documented.
- Performance bottlenecks and inefficiencies are identified and understood.
- Optimisation recommendations are validated and approved by stakeholders.
- Cost efficiency opportunities are clearly articulated.
- The optimisation roadmap is completed and accepted.
- Knowledge transfer sessions are delivered.
- Customer stakeholders confirm readiness to act on the recommendations.

# Service Element: Data Platform Health and Compliance Review

## Description

The Data Platform Health and Compliance Review assesses the reliability, resilience, and compliance posture of the organisation's data platforms across cloud and hybrid environments.

It evaluates the condition and operational stability of Fabric, Azure Data Lake, warehouses, and associated platform components, identifying risks and configuration issues that may affect continuity, performance, or governance alignment.

The service examines how well platform behaviours and structures support organisational policies, architectural principles, and regulatory requirements. It provides clear, prioritised recommendations that improve platform health and strengthen confidence in ongoing data operations, while enabling internal teams to understand and manage their platform environment more effectively.

## Deliverables

| Deliverable                              | Description                                                                                             |
|------------------------------------------|---------------------------------------------------------------------------------------------------------|
| Platform Health Assessment               | Evaluation of stability, reliability, and operational behaviour across data platforms.                  |
| Resilience and Continuity Review         | Assessment of recoverability, redundancy, monitoring, and failure-handling readiness.                   |
| Compliance Alignment Summary             | Assessment of alignment with organisational, regulatory, and architectural requirements.                |
| Security Boundary Conformance Check      | High-level review of platform access, identity alignment, and policy conformity (not security testing). |
| Configuration and Structural Analysis    | Review of workspace, capacity, storage, and hierarchy configuration across Fabric and Azure.            |
| Data Lifecycle and Retention Review      | Assessment of retention alignment with organisational and regulatory obligations.                       |
| Platform Telemetry and Monitoring Review | High-level evaluation of observability, alerting, and log coverage.                                     |
| Risk and Issue Register                  | Documented risks, issues, and root-cause indicators affecting platform reliability.                     |
| Remediation Recommendations              | Prioritised actions to improve health, stability, and compliance posture.                               |
| Knowledge Transfer Session               | Review session to support understanding of findings, risks, and recommended changes.                    |

## Dependencies

Delivery of this Service Element requires:

- Access to Fabric, Azure Data Lake, Warehouse/Synapse, and related environments.
- Availability of monitoring data, platform logs, usage patterns, and configuration documentation.
- Engagement with Data Architects, Engineers, Platform Administrators, and Governance roles.
- Visibility of organisational regulatory obligations and internal policies.
- Access to Purview metadata structures where relevant.

## Constraints

This Service Element is subject to the following constraints:

- Findings rely on available telemetry and may be limited by platform visibility.
- Regulatory interpretation requires customer confirmation of obligations and risk thresholds.
- Some issues may originate from upstream or external systems outside the platform's control.
- Legacy components may lack robust monitoring or configuration metadata.
- Changes recommended may require later remediation or additional services.

## Benefits

This Service Element strengthens The Intelligent Business by ensuring that data platforms operate reliably, consistently, and in alignment with organisational expectations. It reduces operational risk by identifying weaknesses in resilience, continuity, and configuration.

It improves compliance assurance by evaluating platform behaviour against internal policies and regulatory requirements. The service supports informed decision-making by giving leaders a clear understanding of platform health and providing teams with actionable guidance to resolve issues. It enables sustainable and responsible data operations by strengthening platform reliability and confidence.

## 848 Responsibilities

Under this Service Element, 848 will:

- Conduct platform assessments across Fabric, Azure, and relevant hybrid components.
- Analyse platform stability, configuration, resilience, and compliance indicators.
- Review monitoring, logging, retention, and lifecycle behaviours.
- Document risks, issues, and improvement recommendations.
- Provide configuration, governance, and resilience guidance.
- Deliver knowledge transfer and review sessions for internal teams.
- Align all outputs to The Insightful Business and The Intelligent Business Framework.

## Customer Responsibilities

The customer must:

- Provide access to platform environments, telemetry, logs, and configuration information.
- Supply organisational policies, retention requirements, and compliance obligations.
- Validate findings and prioritise remediation actions.
- Engage key platform, security, and governance stakeholders.
- Implement recommended remediation actions unless separately scoped.

## Assumptions

This Service Element is delivered on the basis that:

- Platform and monitoring data are available for evaluation.
- Fabric and Azure services are deployed and operational.
- Customer regulatory requirements are documented or available for review.
- Stakeholders participate in assessment workshops and validation steps.
- Platform access permissions are granted to enable assessment.

## Exclusions

This Service Element does not include:

- Security penetration testing, threat analysis, or SOC activities.
- Detailed performance tuning (covered in Data Storage and Performance Optimisation).
- Data quality remediation or cleansing.
- Development or redesign of pipelines, models, or data structures.
- Implementation of remediation actions identified during the review.
- Ongoing platform monitoring, alerting, or managed service operations.
- Governance policy creation, stewardship processes, or operating model development.
- Certification or audit sign-off for regulatory compliance.

## Success Measures

This Service Element is successfully delivered when:

- Platform health, resilience, and compliance findings are clearly documented.
- Risks and issues are articulated and agreed with stakeholders.
- Recommended remediation actions are approved and understood.

- Platform configuration, retention, and continuity gaps are identified.
- Organisational compliance alignment is reviewed and validated.
- Knowledge transfer sessions are delivered.
- Customer stakeholders confirm readiness to progress remediation and improvement actions.