



CloudRock Advisory Services Overview

An Introduction to CloudRock

About CloudRock

We are a customer-side advisory partner that specialises in helping organisations navigate their HR, Finance and Payroll digital transformation journey.

CloudRock has a global capability across the UK, Portugal, India, Australia and USA.

We have partner alliances with all the top tier HR, Finance and Payroll technology vendors.



+ more

You'll find us around the world,
ready to enable a global customer
list.

Local teams,
global reach.

London
Lisbon
Eindhoven
Mumbai
Bengaluru
Sydney
Melbourne
New York



Our Services



Advisory – Phase 0

Cloud strategy, review of current operating model, processes & data, technology selection, business case development and implementation project mobilisation.



Delivery – Phase 1 Customer Side

Phase 1 Workday experts to lead the implementation of Workday and also bolster the customer team during planning and deployment activities across project management, data, testing, integrations, reporting, functional & change.



Apps & AI

End-to-end AI solutions across strategy, use case definition, architecture, development, integration, testing, and deployment.



Optimisation & Innovation – Phase X

Application Management Support (AMS) plus Phase X and Optimisation project implementation including deploying new SKUs, M&A activity, Global Rollouts, Optimisation Roadmaps, and Review & Recommends.



Some of our customers

Financial Service & Insurance



Professional & Business Services



Technology, Media, Telecommunication



Retail, Hospitality & Transport



Public Sector & Healthcare



Our Advisory Services

We're a proven, trusted advisor

CloudRock were exceptional! We very much appreciated their guidance and support throughout the Phase 0 process.
– Chief Accounting Officer, Digital Banking Platform

When you need someone in your corner as a trusted advisor, who talks you through the whole process, translates the messages and noises from tech vendors & system integrators into your business language and what they **actually mean** for your business, CloudRock are there for you

We bring a **human face** to the elements of implementation and decision making around your digital transformation, acting as your **trusted advisors**

We augment your team's existing **experience and skills**, providing deep experience and capacity to meet your timelines and underpin the delivery of your business requirements

We help to ensure that you **avoid common pitfalls** that lead to extra cost and lost time, **de-risking** your team's delivery and protecting this major business investment



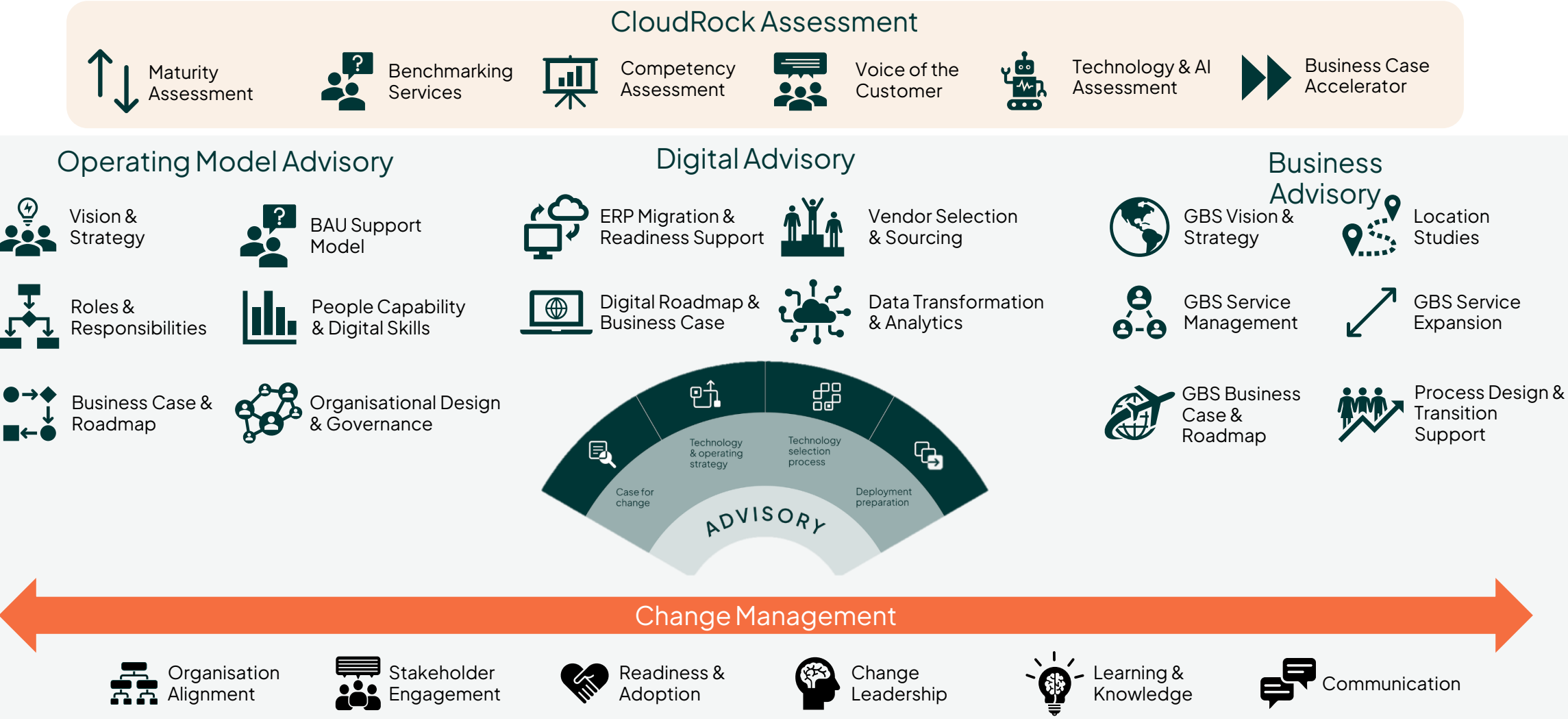
We have **strong relationships** and experience with each of the major technology vendors across HR, Finance and Payroll as well as with each of the major system integrators to ensure your project is set up for success

Our team has **decades of combined experience across hundreds of successful transformations** in the technology implementation and delivery space covering customer side and the SI side experience

We have conducted **over 300 engagements** for organisations of all sizes and in many different industries allowing you to benefit from our pool of collective learnings

We learn about **your business** to tailor the delivery processes to your specific situation and specific needs and to ensure your new software **accelerates your business objectives**

Overview of our Advisory Services



Our approach to 'Phase 0'

Phase 0 is a dedicated phase to assess and prepare for your digital transformation. Projects with Phase 0 are less likely to fail, go over budget or be delayed. It lays a solid foundation of efficiency and effectiveness, and you're more likely to achieve your project goals due to:

- Accountable sponsorship from the start
- Clear vision and strategy, strong case for change
- Comprehensive understanding of business requirements
- Stakeholder alignment
- Change readiness focus
- Early risk mitigation & management
- Effective vendor negotiation

Phase 0 is your best chance to minimise risks and maximise the chances of success for your digital transformation.



Typical Phase 0 Journey & Accelerators

Wherever you are on your HR, Finance & Payroll digital transformation journey, we can support you with expertise and accelerators with a flexible approach aligned to your timelines – typical Phase 0 projects run from 4–6 months.

Phase 0

Phase 1 Pre-Plan

1 Identify the Need to Transform

- Strategic review of **operating model, process & policy capability assessment, data & technology landscape**
- **Foundation decisions** such as job architecture
- Gather **key metrics** to inform the case for change
- **Change readiness**
- Stakeholders defined & engaged
- Scope & timetable defined

2 Explore Possibilities

- **Technology market view**
- Selection strategy & plan
- **Evaluation criteria**
- **Requirements database**
- RFI/P issued to tech / SI
- **Use cases**
- Demos
- Customer references
- **Responses evaluated/fit gap**
- Preferred supplier recommended

3 Make the Case for Change

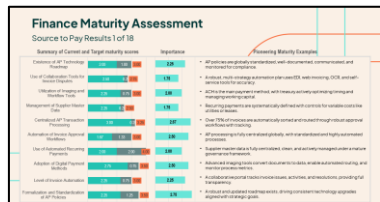
- **Initial case for change (BCA)**
- Discovery workshops for detailed scoping
- Due diligence
- Supplier onboarding
- Planning – resources & budgets
- Commercial negotiations for technology and deployment partner
- Final case for change
- Contracts signed

4 Mobilise Project

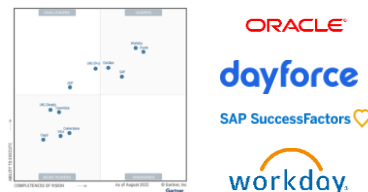
- Project Governance
- Project Charter
- Mobilise resources (backfill, hire, contract)
- Pre-Kick off training
- Change readiness
- Foundation preparation activities
- Project kick-off

Outputs We Can Deliver

Maturity Assessment



Long List to Short List



Tailored RFP Requirements

Criteria	Weighting	Oracle	Dayforce	SAP	Workday
Functional Capability - HCM	High	4.5	4.0	4.0	4.5
Functional Capability - PMS	Medium	4.0	4.0	4.0	4.0
Functional Capability - Payroll	Medium	4.0	4.0	4.0	4.0
Integration	Medium	4.0	4.0	4.0	4.0
Deployment Partner	Medium	4.0	4.0	4.0	4.0
Comment					

Evaluation & Options Assessment

Vendor	Oracle	Workday	SAP	Dayforce	Oracle	Dynamics 365
Relationship status with Client	None	None	Current for Expenses & Travel	None	None	CRM
Geographical Fit (Languages & Compliance)	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★
Functional Capability - HCM	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★
Functional Capability - PMS	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★
Functional Capability - Payroll	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★
Deployment Partner	Vendor or Partner	Vendor or Partner	Partner	Vendor or Partner	Vendor or Partner	Partner
Comment						

Business Case



Stage 1 | Identify the Need to Transform

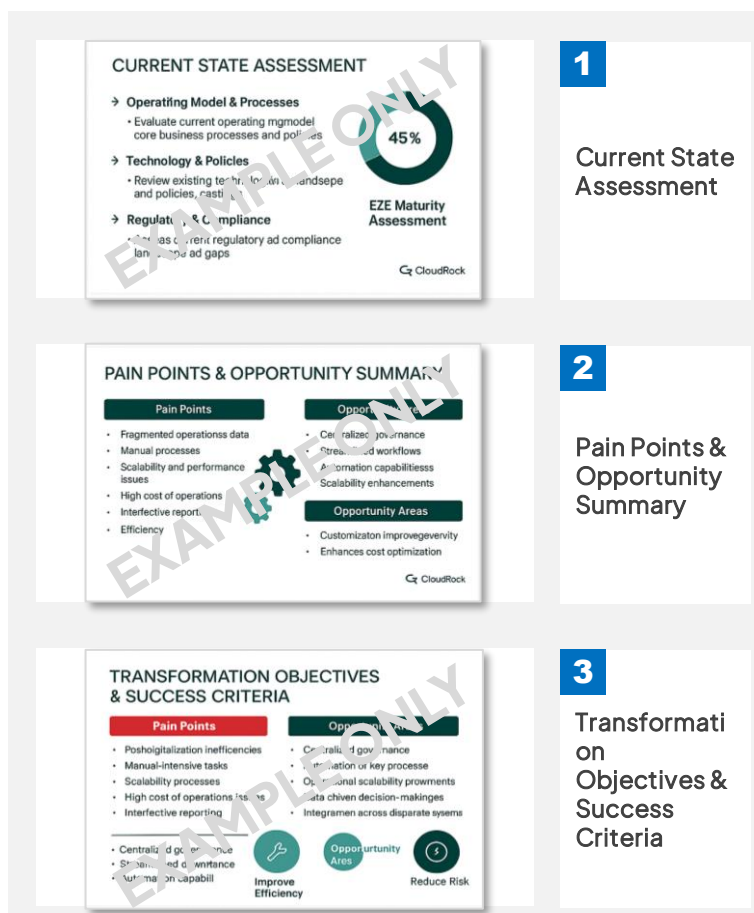


Key Activities

- Review the **current operating model**, key **processes**, **policies**, **data** quality and **existing technology** to understand pain points and structural issues.
- Validate **core decisions** such as overall scope, level of standardisation, design principles, and links to job architecture or organisational changes.
- Gather **baseline performance metrics** (e.g., cycle times, error rates, cost-to-serve) to quantify the case for change and identify priority improvement areas.
- Assess **change readiness** across leadership alignment, stakeholder engagement, capacity constraints and anticipated resistance.
- Define **early scope**, **objectives**, **success criteria**, risks, dependencies and a high-level transformation roadmap.



Typical Deliverables



Outcomes

- A validated case for why change is required, supported by metrics and evidence
- Clear definition of scope, ambition, design principles and transformation objectives
- High-level understanding of process, data and technology gaps
- Agreed success measures, risks, dependencies and a preliminary roadmap
- Alignment across key stakeholders on the need for transformation

Stage 2 | Explore Possibilities



Key Activities

- Conduct a **targeted market review** of relevant **platforms** and vendors, assessing capability fit, scalability and alignment to future-state needs.
- Build a **structured evaluation framework** with clear functional, technical, integration, reporting, data and compliance criteria.
- Develop detailed requirements and issue **RFI/RFP** documents to shortlisted vendors and delivery partners.
- Run **scripted demonstrations**, review references and assess vendor delivery approach and capability.
- Complete a **fit-gap analysis** to understand solution alignment and where process redesign or configuration would be required.
- Compare **proposed commercial models, implementation timelines** and **risk profiles** to recommend the preferred technology and/or SI partner.



Typical Deliverables

CAPABILITY COMPARISON MATRIX	
Evaluation Criteria	Now v Future
Functionality	Core capabilities (for example)
Usability	Con. screens
Analytics	Data analysis and reporting
Integration	System integration
Deployment	Integration across disparate systems

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Capability Comparison Matrix

EVALUATION CRITERIA & SCORING MODEL	
Evaluation Criteria	
• Capability requirements	
• Vendor experience	
• Cost	
• Delivery approach	
Scoring Model	
• Develop scorecards and criteria weightings	
• Enable objective vendor scoring and assessment	

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Evaluation Criteria & Scoring Model

SHORTLIST RECOMMENDATION	
Vendor Shortlist	Recommendations
• Vendor A	• Review proposals
• Vendor B	• Lead vendor
• Vendor C	• Identify best fit vendors for further evaluation
	• Assess alignment with key requirements

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Shortlist Recommendation



Outcomes



- Comprehensive requirements set and evaluation criteria
- Clear view of market options and their suitability to the organisation
- Fit-gap analysis showing how well each solution meets needs
- Recommendation of preferred technology and/or implementation partner
- Indicative commercial view, delivery approach and timeline from potential suppliers

Stage 3 | Make the Case for Change

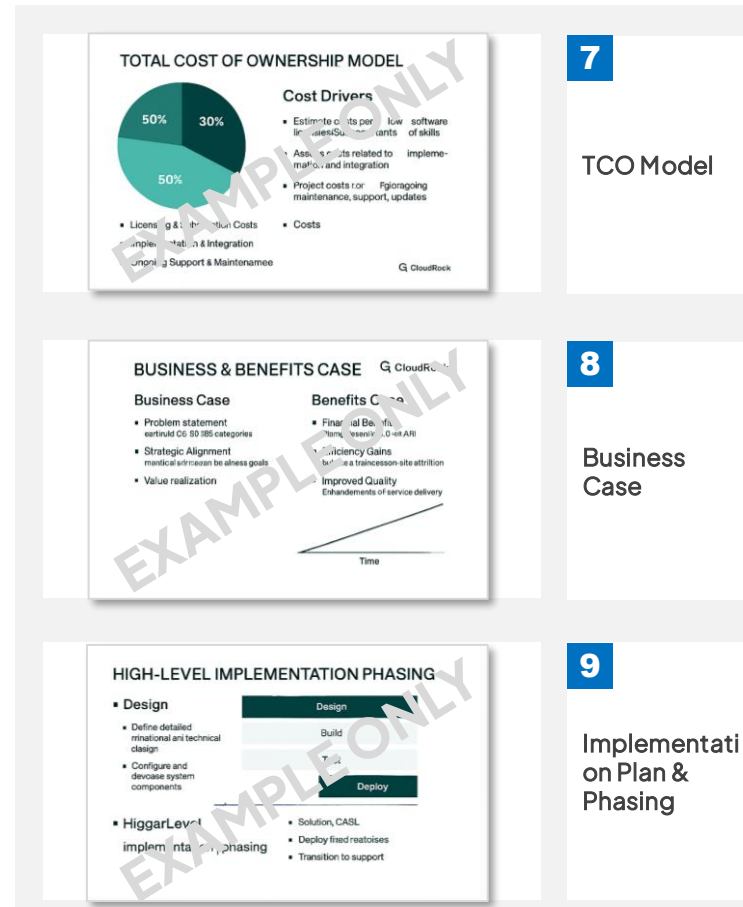


Key Activities

- Build the **business case** with **quantified benefits**, **cost estimates**, **implementation effort**, **risk assessment** and **total cost of ownership**.
- Conduct further **discovery workshops** to refine **scope**, confirm **assumptions**, validate **integration** and **data** needs and clarify reporting requirements.
- Carry out **commercial**, **technical** and **security** due diligence on shortlisted vendors and partners.
- Develop a **detailed resource model**, delivery approach, phasing, timeline and budget that supports the proposed programme.
- Finalise **negotiations** on **licensing**, **implementation** services and contract terms, securing approval to proceed.



Typical Deliverables



Outcomes



- Fully developed and approved business case (benefits, costs, risks, ROI)
- Refined and validated programme scope, assumptions, integrations and data needs
- Completed due diligence and negotiated commercial terms
- Confirmed delivery model, resource plan, budget and high-level implementation plan
- Signed contracts enabling mobilisation to proceed

Stage 4 | Mobilise Project

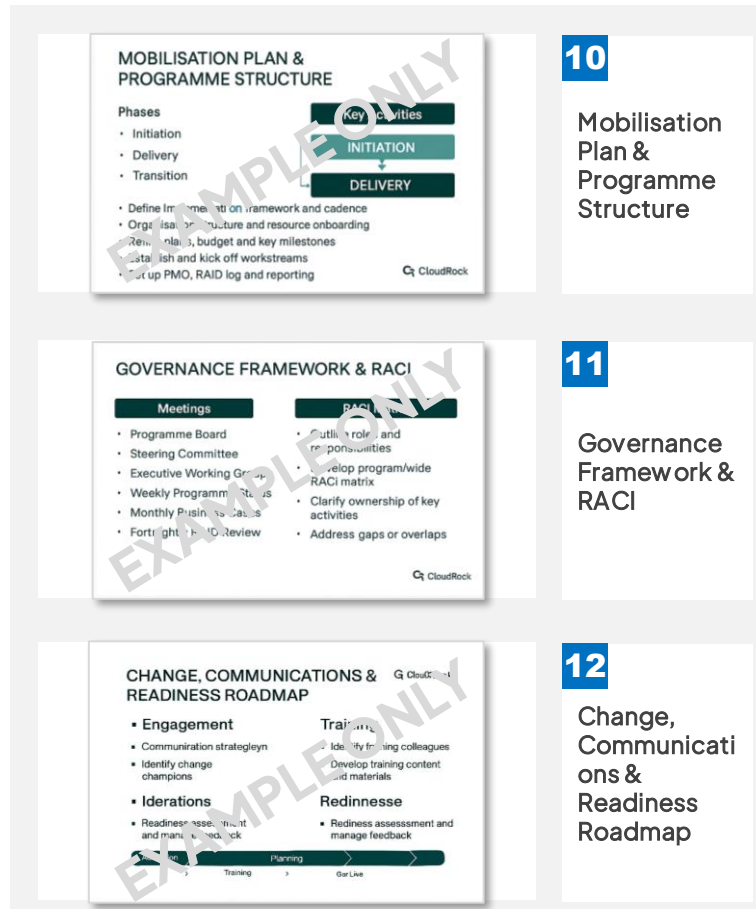


Key Activities

- Establish **programme governance** structures, PMO processes, decision rights and reporting cadence.
- Create and approve the **project charter** outlining detailed scope, objectives, KPIs, milestones, budget and roles.
- Mobilise the **core team**, onboard **internal** and **external resources** and confirm **SME availability** and backfill arrangements.
- Perform **initial change** and **readiness activities**, including stakeholder mapping, early communication planning and foundational preparation (data, integration inventory, environments).
- Prepare for and run the **formal programme kick-off**, aligning teams on objectives, timelines, ways of working and next steps.



Typical Deliverables

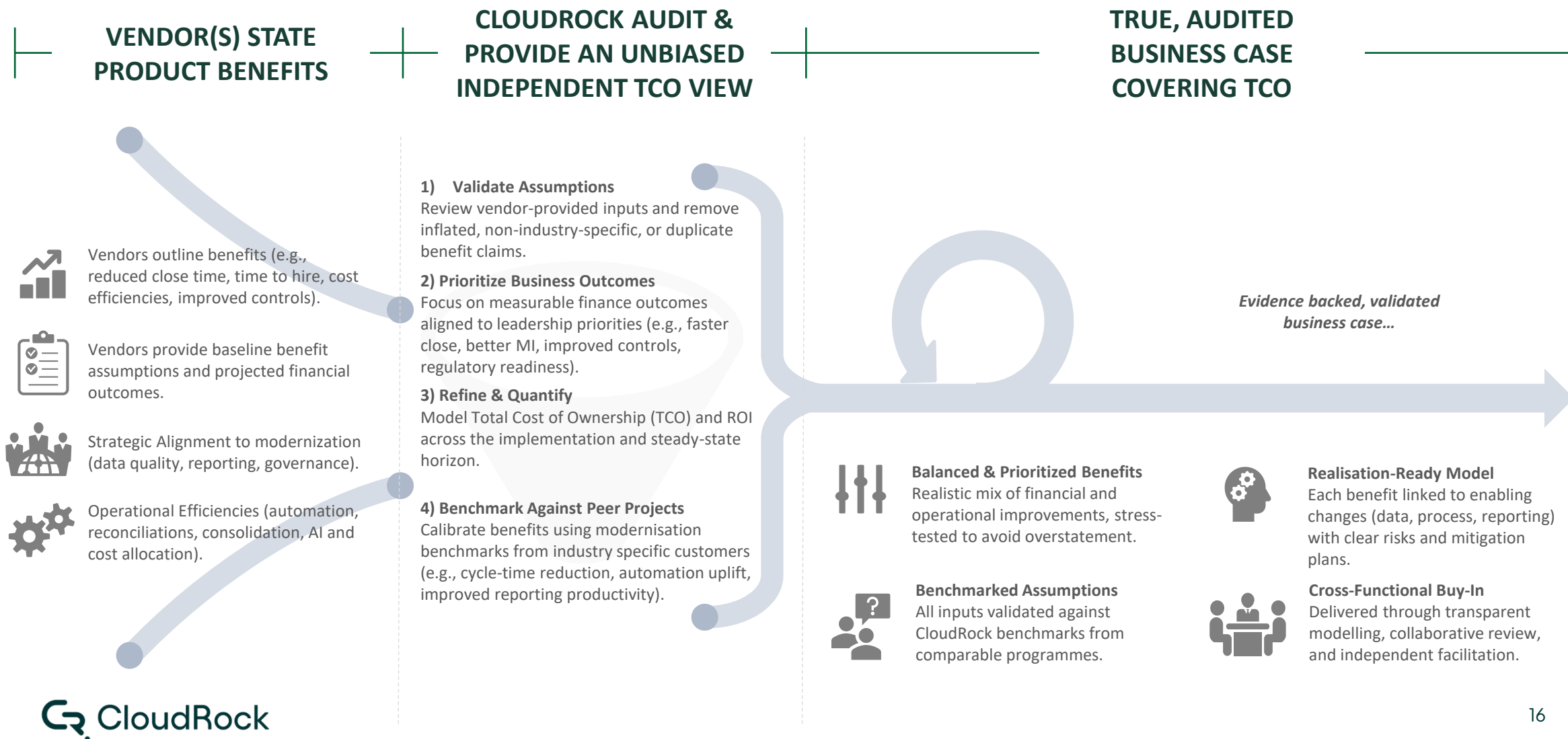


Outcomes

- Established programme governance, PMO structures and ways of working
- Approved project charter with detailed scope, KPIs, milestones and responsibilities
- Fully mobilised core team with onboarding completed
- Initial change readiness established and foundational preparation completed
- Successful project kick-off and transition into delivery



Independent Business Case



CloudRock Data & Accelerators



A high-angle, low-key photograph of a person walking across a dark, tiled floor. The person is seen from behind, carrying a bag, and is illuminated by a strong light source from above, creating a long, dark shadow. The floor tiles are large and square, creating a grid pattern. The overall mood is mysterious and professional.

We guide you through
successful HR, Finance & Payroll
digital transformation



Thank you.