



Service Definition Document



Systems & Process
Optimisation

Service Overview

Fluid's Systems & Process Optimisation service helps public sector organisations improve the performance, efficiency and value of existing digital systems and the business processes they support.

This service is typically used where an organisation has implemented new platforms or services but is experiencing challenges such as inefficient workflows, under-used functionality, manual workarounds, poor integration, operational friction or rising support

overhead. It provides an independent review of how systems and processes are operating in practice and identifies opportunities for improvement and optimisation.

The service supports buyers in maximising return on existing investment, improving resilience and ensuring systems continue to meet organisational needs over time.

Service Scope (What's Included)

Fluid will provide a structured assessment covering:

- Review of current system usage, operational performance and pain points
- Assessment of business processes and workflows supported by digital platforms
- Identification of inefficiencies, duplication, manual workarounds and bottlenecks
- Review of system configuration and opportunities for improved adoption
- Optimisation of integration points and information handoffs between services
- Assessment of reporting, management information and operational visibility
- Identification of opportunities for automation and service improvement
- Consideration of service resilience, continuity and recovery requirements
- Development of a prioritised optimisation roadmap and improvement plan
- Support for implementation planning alongside delivery partners where required

This service applies across a wide range of platforms, including ERP, CRM, finance systems, HR systems, case management solutions and data services.

Out of Scope

(What's Not Included)

This service does not include:

- Full delivery of major system replacement programmes
- Acting as the prime implementation or systems integration provider
- Procurement of new software, infrastructure or hosting services
- Bespoke software development beyond optimisation support
- Long-term managed service provision unless separately agreed

Fluid's role is to provide structured optimisation support and independent recommendations, working alongside buyer teams and delivery partners where appropriate.

Deliverables & Outputs

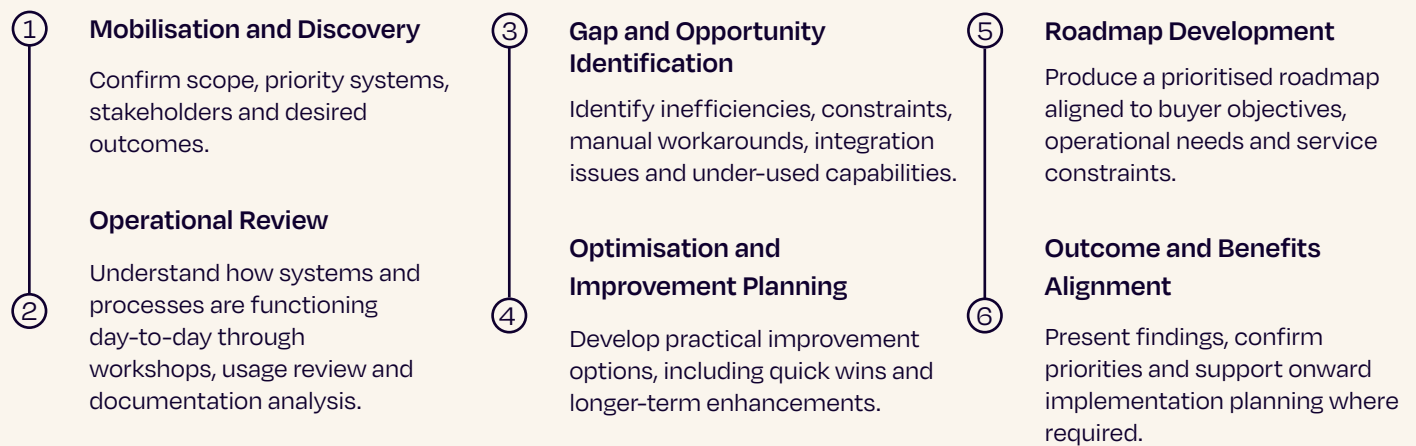
Typical deliverables include:

- **Systems & Process Optimisation Assessment Summary**
- **Operational Pain Point and Efficiency Findings**
- **Opportunities for Process Simplification and Improvement**
- **System Enhancement and Adoption Recommendations**
- **Integration and Information Flow Improvement Observations**
- **Automation and Service Improvement Opportunities Log**
- **Resilience, Continuity and Recovery Considerations** (high level)
- **Prioritised Optimisation Roadmap and Action Plan**
- *Optional: Delivery Support Packs* for onward implementation activity

Deliverables are typically provided as presentation-style packs (PowerPoint) and structured governance artefacts, with streamlined Word formats available where required.

Delivery Approach

Fluid delivers this service through a structured and buyer-centred design approach:



Fluid can work alongside internal teams and delivery partners, maintaining an independent advisory and improvement-focused role.

Roles & Responsibilities

Fluid Responsibilities

- Lead optimisation assessment and stakeholder engagement
- Provide independent identification of improvement opportunities
- Develop practical recommendations and prioritised roadmap outputs
- Support buyers in planning next steps and delivery approaches
- Ensure optimisation activity remains aligned to service outcomes

Buyer Responsibilities

- Provide access to service owners, users and operational stakeholders
- Share relevant system information, performance issues and constraints
- Participate in workshops and validation sessions
- Confirm priorities and approve optimisation roadmap actions
- Support coordination with delivery partners where required

Assumptions & Dependencies

This service assumes:

- Availability of key operational and system stakeholders
- Access to system usage information and relevant documentation
- Buyer engagement in validating improvement priorities
- Timely feedback to maintain delivery momentum

The depth of optimisation activity will vary depending on system complexity and organisational scope.

Outcomes & Benefits

By completing this service, buyers achieve:

- Improved efficiency and effectiveness of systems and processes
- Reduced operational friction, manual workarounds and overhead
- Better utilisation of existing platform functionality and investment
- Enhanced integration, reporting and service visibility
- Increased organisational resilience and continuity awareness
- A clear, prioritised roadmap for optimisation and continuous improvement
- Stronger alignment between operational needs and digital service performance



Commercial Model (High Level)

This service is typically delivered over **2–10 weeks**, depending on the number of systems and processes in scope and the level of optimisation required.

Pricing is generally offered on a fixed-scope or time-and-materials basis, with transparent day-rate structures aligned to the expertise required.

Security & Compliance (Light Touch)

Fluid applies appropriate confidentiality and information governance controls throughout delivery.

Engagements are delivered in line with buyer security requirements and recognised good practice for handling sensitive operational and service information.

