



Brave & Heart

Project Management and Process Optimisation

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Who We Are

Deliver with **Bravery**, Act with **Heart**.

Driving strategic change across IT, HR, and Digital domains, we are **Brave & Heart**. Committed to cutting-edge innovation, tactical excellence and unparalleled success, we are trusted by multiple global clients to turn their great ideas into a tangible business reality. Operating across our 3 core pillars, our specialist team consistently get to the heart of our client's business challenges and empower them to be brave in their strategies.

We have an agile approach to teamwork, working in "pods" that bring people from all sectors and levels of the business together. This means we can mix and match our best talent, scaling up or down to meet each unique challenge and supplementing the teams where needed.

A strategically led company, with an extensive digital core and an unwavering focus on people.

Our way. Your way. **The Brave & Heart Way.**



Everything we do, we do it strategically. For our clients and for ourselves.



We are industry-leading digital specialists and extend this expertise across all our work.



Placing people at the heart of our operations, we are always customer focused.



Our Mission & Values

Your Success, Our Mission

At Brave & Heart, we are unapologetically independent. We use our global experience to provide innovative, focused solutions which consistently exceed client expectations. Underpinned by our values, **we make your success our mission.**

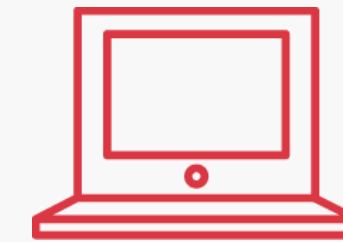
We incorporate our Values into everything we do. These Values are embedded into our culture, our operations and our relationships. By partnering with us, we will extend these Values into your own organisation to drive your success.

Be Collaborative



We recognise that you know your business best, and so we design our entire solution in collaboration with you. Our process is about you, your needs and achieving your vision.

Be Modern



We strive to be leaders within our fast-paced, ever-evolving sector, providing modern solutions to modern problems.

Be Focused



Ensuring success at every step, we always remain focused on the task at hand. Whilst we design our solutions to evolve alongside you, we consistently remain steadfast in our approach.

Be Supportive



We are partners with all our clients, whereby their success is our success. At every stage, we support our clients to achieve their maximum potential and realise their vision.



Our Difference

As a proudly people-oriented organisation, we always place the client at the heart of everything we do. Owing to our wealth of global experience, we recognise that every client is unique and therefore, every strategy, tactic and solution that we develop is bespoke.

To deliver our bespoke solutions, we follow one simple rule: **Strategy First, Tactics Second**. This is what enables us to deliver successes for our clients, week in and week out. Underpinned by our commitment to tactical excellence, and innovating cutting-edge solutions, our overarching focus on transformative strategies is what our brings our clients consistent success.

In addition to our driving mission, we are also set apart from other agencies in the following ways:



Push our Scope of Work

We don't just rest in our "swim lane" – we ensure that we always do the right thing for all our partners.

Where we can we ALWAYS go the extra mile, something that has been recognised by our clients through the level of support we give compared to other agencies.



M365 Support

Our experienced team have a wealth of SharePoint, Teams and Power Platform knowledge, having completed complex developments for clients.

As official Microsoft Partners, you can be confident in our knowledge and capability.



Value for Money

We don't charge you for the sake of it – we ensure to put value at the top of our agenda. If we can offer swift value without charging, we will.

Our focus is on helping you deliver and getting challenges moving forwards, not on increasing our bottom line.



High Quality Work

We pride ourselves on quality in the team.

We ensure at all points that the sign off ensures you receive results that are always up to scratch.

Our quality ethos is your quality ethos, and our results speak for themselves.



Who We Work With

We have experience across IT, Social Media, Digital & PR with public sector organisations. Our successes include, but are not limited to:

- Revolutionising CPI's project management process by building a new, tailor-made project management tool
- Overhauling CPI's reporting process, reducing the time taken to create reports of their projects from weeks to seconds, allowing them to focus on their work.
- Developing an employee value proposition for CPI, allowing them to retain and attract the industry's top talent.
- Delivering a focused transformation programme to strengthen operational resilience and enhance customer service for Northern Power Grid.
- Devising and implementing an IT strategy to drive innovation and charge delivery to create organizational change for CPI.
- Designing an Employee Value Proposition for the MTC complete with new visual branding, communication rollouts and staff training.

We have also worked with global clients, Including DP World, Nissan UK, P&O Ferries and many more.



Social Value

We are extremely proud to be one of less than 2500 B Corp certified companies in the UK, part of a global community of businesses that meet high standards of social and environmental impact.

The actions we've taken to become a B Corp are at the heart of our identity. By integrating B Corp's rigorous standards into our business practices, we have created a sustainable and socially responsible operation that benefits our team, clients, communities, and the environment.

We are also accredited by the Living Wage Foundation as an official employer. A positive and safe work culture must extend to pay and working hours - pizza parties can only go so far.

We offer our employees a flexible working policy, as we believe people should work to live, not the other way around.

Our staff are also offered a continued learning program, whereby they can take part in a training or education programmes to develop their skill set.



Our Methodologies & Tools

Our primary project management methodology is based on APM – The Association for Project Management.

Our whole team is APM trained, with our Digital Development Group certified as Agile Project Management Practitioners.

Alongside our bespoke 3D methodology (Discover, Design, Deliver), APM methodologies allow us to work in agile sprints, breaking down projects into phases of delivery. We identify quick wins and deliver iterative success, allowing our clients to utilise the most key aspects of the solution, as quickly as possible. We follow the APM Agile Methodology as outlined below:

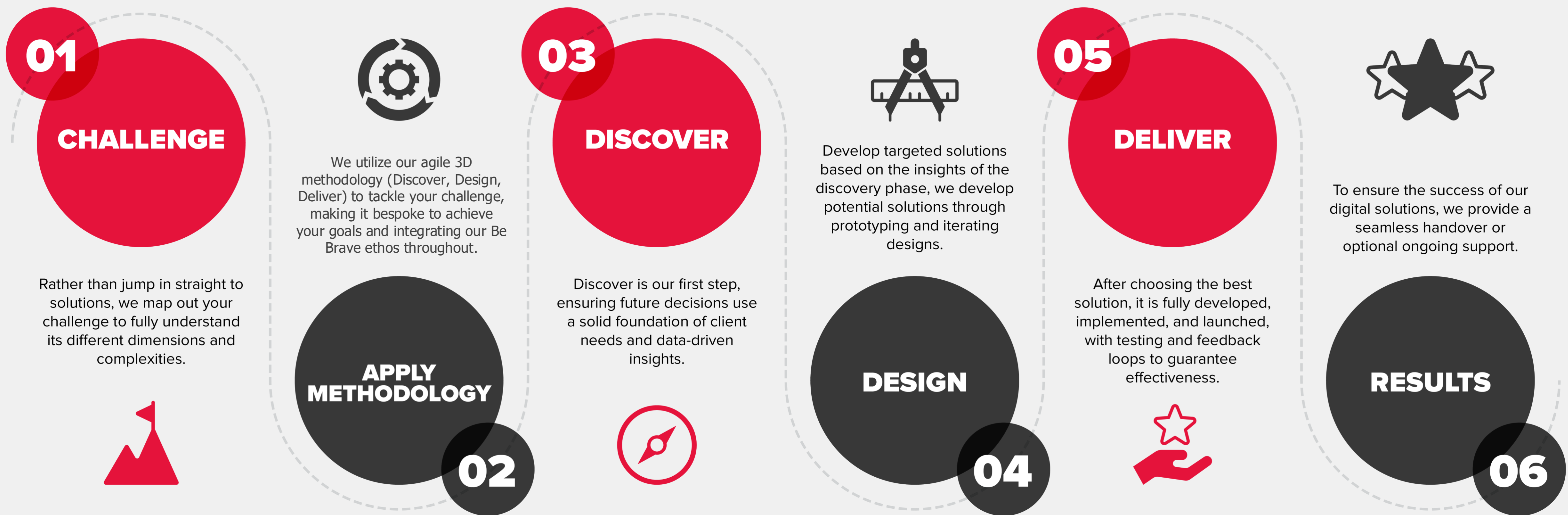
Research	Concept/ideas	Design	Test
Aligning with our Discovery Phase, we use this APM Stage to review your current organisation layout. This includes evaluating your processes, strategies and the required outcome. For further insight into your current solution, and satisfaction levels, we will also review your Key Performance Indicator rates and feedback patterns.	Building upon our research, we then start to brainstorm possible solutions to streamline your operations/processes. Owing to our area of expertise, we also use this APM Stage to propose improvements for your digital interface. To enhance our concepts, this Stage includes Discovery Workshops and wireframes.	Following our extensive research and concept designs, we assemble a Basic Design Plan. Tailoring our solution to your needs, as we progress, we increase the robustness of our designs, leading to our creation of a formal Project Definition Document. This then informs the development of your plan, product and/or solution.	Ensuring functionality, and your satisfaction, we would support the final testing of your solution before launch. During this process, where improvements/fixes can be made, we will do so swiftly. Beyond launch, we also include testing-upon-request within our 1-month Hypercare Package.



Our Methodologies & Tools

We use our bespoke 3D methodology because it gives us a structured, agile, and repeatable way to solve complex client challenges while maintaining speed, quality, and collaboration.

A typical implementation of 3D is shown below.



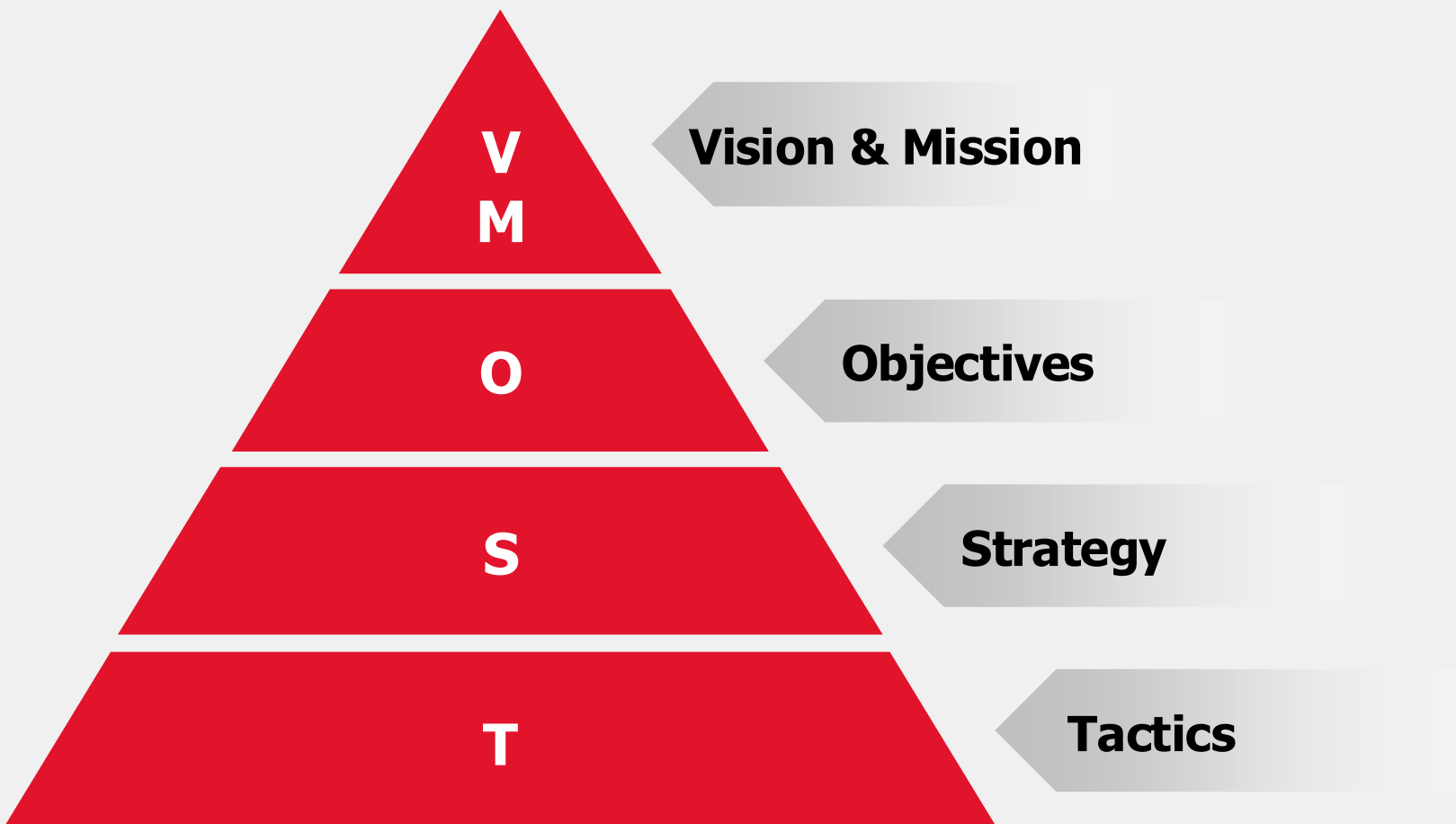
Our Methodologies & Tools

To develop your transformative strategy, we usually follow the V-MOST Framework. Championing your vision, this Frameworks ensures that everything we do is aligned to your overall purpose, mission and values at every step.

While this is our core framework, and one that we have repeatedly used with success for global, blue-chip companies and SMEs alike, depending on your business needs we can tailor our methodology to you as needed.

V-MOST Framework

- V** – Vision, where you're going in the next 5 - 10 years. Your north star.
- M** - Mission that helps you move towards that vision (over 1 - 3 years)
- O** - What measurement objectives you will set to achieve the mission
- S** - What strategies you will put in place to support your objectives
- T** - The tactical work you will carry out to achieve objectives and strategies



Product Overview

Centralise project management information in Microsoft SharePoint and Teams with our Project Management and Process Optimisation service. Working with you to assess gaps and provide solutions, we will configure sites, metadata and permissions, standardise processes, and build Power Automate workflows for approvals, notifications and reporting.

Tailored frameworks, UX design, and ongoing support enable governed collaboration and scalable delivery using recognised methodologies, while improving visibility, accountability, and adoption across teams, reducing duplication, minimising risk, and ensuring information is easy to find, manage, and maintain as your organisation evolves.



Our Project Management Process Optimisation with Microsoft SharePoint & Teams includes the following industry-leading features:

- Multi-layered project management, delivered through Microsoft SharePoint and Teams
- Increased insight and control of projects, resources and job statuses
- Customisable to your needs, using out-of-the-box SharePoint architecture
- Automated categorisation of projects based on priority
- In-built intuitive dashboards via Power BI
- Integrated with Microsoft Task Management
- Integrated with MS Planner/Project
- Comprehensive overview of workflow allocation
- Extendable through forms, lists and Power Platform Automation
- Integrates across all Microsoft-compliant applications



Case Studies

CPI

Owing to our global expertise, and our future-focus, CPI called upon the Brave & Heart team to deliver an optimised Project Management Office (PMO) solution for their IT Team. As a driving force in the complex UK Catapult Network, CPI needed us to immediately centralise their management processes within one efficient platform.

Fulfilling this requirement, we created a comprehensive PMO SharePoint solution utilising an extensive array of in-built tools which fully utilise Microsoft SharePoint, Tasks, Teams and OneDrive. Providing continuous support, we also hosted dedicated software workshops and tool-specific training sessions to run alongside implementation.

Fostering collaboration, we worked with CPI extensively during the Design and Delivery Phases. Due to our understanding of CPI, we recognised that our PMO implementation would lay a perfect foundation for our more complex Power Platform solution. Whilst we delivered our Power Platform later, we built it upon the structural foundations of our PMO implementation.

As a result of our ongoing partnership, CPI have continued to trailblaze the path to success within the UK Catapult Network.



John Kavanagh
Chief Information Officer
CPI

"With Brave & Heart's support, we were able to successfully launch a series of PMO tools. This allowed us to centralise and manage the complete IT portfolio, gathering all project reports and developing PMO standardised processes."



Our Successes



"Brave and Heart allowed us to bring to life a project that we'd been imagining for years. We were finally able to revolutionise how we do impact reporting, and the time and effort already saved has been incredible."

Louise Barker – Director of Impact, CPI



Bringing in Brave & Heart to be fresh eyes with subject matter expertise allowed us to quickly identify the work needed and immediately put in place positive steps to reshape our capability for the future success."

Frank Millar – Chief Operating Officer, CPI



"Brave & Heart quickly highlighted areas for optimisation, helping create cost savings and lay the foundation for a new way of engaging with customers."

Nicolas Verneuil – Sales & Marketing SVP, Nissan GB



"We have been so excited to have the Brave & Heart Team on board. With their ability to quickly get to the root cause of our issues and then devise a realistic and achievable strategy to rectify we are well on our way to digital IT excellence."

Jodie Coe – Human Resources & IT Director, CPI



Data Backup, Restore & Recovery

Upholding compliance, we backup, restore and recover data in accordance with the Data Protection Act 2018, GDPR and our robust Data Protection and Data Security Policy. Owing to our use of Microsoft365 servers, all our products/services are equipped with in-built data backup, restoration and recovery features within Azure Cloud. Prioritising data protection, this ensures that all our client data is automatically backed-up and easily restored/recovered with one-click.

Providing a centralised solution, Azure stores and backups all our client data within the secure Microsoft Cloud. Demonstrating Azure’s reliability, it is certified to the following standards:


Brave & Heart


Microsoft Partner


Microsoft Azure

- ISO27001
- ISO27018
- SOC 1
- SOC 2
- SOC 3

- FedRAMP
- HITRUST
- MTCS
- IRAP
- ENS







Onboarding & Offboarding

To streamline our client's experiences using our products/services, our Delivery Teams provide comprehensive onboarding and offboarding support.

Onboarding

Ensuring our clients can competently use our products/services as soon as possible, we provide client-specific workshops, onsite training and online training through Teams and Loom. For clarity, we detail the usability of all our products within each respective Service Agreement. Upon request, we also provide Full User Documentation for future reference.

We also provide dedicated onboarding support within our 1-month Hypercare Package, which begins immediately upon product/service launch. To swiftly resolve any post-launch issues, this Package includes:

- Additional bug testing/fixing
- Extensive technical support
- Ongoing communication with a dedicated Technical Account Manager

Offboarding

Owing to our commitment to relationship-building, most of our clients renew their contracts with us after the closure of our initial agreement. For a seamless transition from our product/service, in the rare circumstance that a client does not renew their contract, we operate a robust offboarding process. Allowing us to identify and resolve any issues, our offboarding process includes:

- Completing a Closure Report and a Project Closure Review with the client
- Providing support for data transition
- Establishing any agreements for post-handover support
- Offering full contract closure documentation



Service Levels

At Brave & Heart, we provide comprehensive support throughout the project lifecycle and beyond. During implementation, you will have a dedicated Project Manager as your single point of contact, supported by a skilled development team. This ensures smooth delivery, consistent communication, and rapid resolution of queries

We are a UK-based, remote company, with a presence in France. When operating remotely, our team is available between 9:00 and 18:00 GMT. We are able to work on site as needed by clients, which will be agreed at the outset of our projects. During and after development and implementation, we are contactable via:

- Your dedicated support mailbox
- Audio and video calls
- Microsoft Teams chat

Response Times

Our support operates Monday–Friday, 09:00–18:00 GMT, with exceptions available for key events. We follow a structured Service Level Agreement (SLA) to ensure prompt responses and resolutions. Upon receiving an issue, we classify it by priority and provide resolution timelines:

- High Priority: Respond within 1 hour, resolve within 4 hours if within our control
- Medium Priority: Respond within 2 hours, resolve within 1 working day
- Low Priority: Acknowledge within 4 hours, resolve within 3–5 days
- Change Requests: Define scope and priority, develop a resolution plan within 3 days

If escalation to Microsoft is required, their support timelines will take precedence, and we will act as intermediaries.



After Sales Support

Ensuring our services/products seamlessly transition into your operations, we offer multi-tiered Support Packages. Reflecting the client's needs/preferences, we provide a complimentary Hypercare Package and our negotiable Standard Support Packages.

Hypercare

To streamline the implementation of our service/product, we provide a complimentary Hypercare Package with every purchase. Maximising the immediate success of our service/products, our Hypercare Package lasts for 1-month from system launch and includes:

- Additional bug testing/fixing
- Extensive technical support
- Ongoing communication with a dedicated Technical Account Manager

Standard Support Packages

For the optimal amount of support after Hypercare, we offer additional Standard Support Packages. Tailored to meet the client's requirements, each comprehensive Package comes equipped with:

- A dedicated Technical Account Manager
- General maintenance services
- Extensive technical support, including fault-finding and quick-fixes
- Access to our support desk from 9am-6pm (excluding weekends/holidays)

Reflecting client preferences, we are able to be flexible and work within your budget, and support will be agreed with yourselves during discovery. We typically recommend 1-2 days of support per month. Our time spent on support is logged in 15-minute increments.



System Requirements, Hosting & Security

Technical Requirements

We strive for all our products and services to be as accessible as possible. For our bespoke products, we only require the following technical arrangements:

- A compliant browser (e.g., Edge, Chrome, Safari)
- A stable internet connection
- All appropriate licenses, in-date and validated

Outage and Maintenance Management

All our products/services are maintained through Microsoft, who have a global service availability of 99.9%. Owing to Microsoft's international network of Edge servers, we experience very little outages. To report on any upcoming outages, Microsoft release email and public dashboard alerts well in advance of maintenance beginning.

As defined within their Service Level Agreements, Microsoft is responsible for the availability of their servers.

Hosting Locations

As a trusted Microsoft Partner, all Brave & Heart platforms and developments are hosted and backed up on the secure Microsoft 365 and Azure Clouds, with primary data storage in the UK, specifically in the Azure UK South or UK West regions. This ensures that the infrastructure is compliant with GDPR and ISO 27001 standards, providing a secure environment for your data.

Access to Data, upon Exit

Throughout our process, all client data is held on the client's own tenant and is owned by the client. Upon exit, the client has full access to their data through their internal system.

Security

We host all our platforms on Microsoft365 and Azure Clouds which come equipped with Microsoft's Operational Security Assistance feature. This means that all your data is backed-up in accordance with GDPR requirements.

