SS&C Blue Prism®



G-Cloud 15 Service Definition Document

Professional Services

The best way to get the Intelligent Automation tech-stack and environment in tip-top shape for high performance

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1. Professional Services

1.1. Overview

SS&C Blue Prism is an Intelligent Automation and Agentic AI platform. It uses software to replicate the interactions of people and technology to automate a wide range of operational and support processes quickly, cost effectively and reliably.

Deployed non-disruptively, it requires no replacement of systems, deployment of agents, software development or system integration.

The solution is primarily delivered as a service from a scalable and secure hosted cloud-based environment to over 140 countries from 17 locations worldwide. In exceptional circumstances (and if required for specific security purposes), flexibly, the platform can optionally be deployed onto a dedicated on-premise architecture, private or public cloud or hybrid to suit your governance and deployment preferences.

Our automation and agentic AI platform takes the support & business processes and the system & tools interactions typically performed by humans, turns them into automation procedures and delivers them using virtual workers who emulate human staff.

The virtual workers are “trained” how to use the systems and applications, procedures are replicated in process workflows, and the virtual workforce will execute them on demand or against a predefined schedule. Agents are designed and built in the platform and set to work within an Agentic Workflow.

1.2. Service Description

The SS&C Blue Prism Intelligent Automation and Agentic AI portfolio delivered either via the SS&C Blue Prism WorkHQ platform, the SS&C Blue Prism Cloud service or the SS&C Blue Prism Enterprise allows organisations to transform their businesses and fundamentally change the way they execute work.

To maximise the potential of the Intelligent Automation platform, increase the return on investment it provides, and enhance the speed of transformation, SS&C Blue Prism offers a range of professional services engagements, delivered by expert resources with vendor-direct knowledge of the software and SS&C Blue Prism good practice.

1.3. Service Features

- Plan, design, and assure solution architecture
- Platform implementation, deployment, configuration, and upgrade
- Product and infrastructure optimisation; review, report, and remediation
- Automation and Agentic AI lifecycle services: discovery, assessment, design, build, test
- Setup and initiation of automation and agentic centres of excellence
- Establishing and managing an operations model for automation (ROM/EOM)
- Automation and Agent Building best practice, governance, and control
- Design authority: Long-term support for automation and Agentic operation
- Training, upskilling, coaching and mentoring
- Automation and Agentic AI strategy: Building a sustainable and scalable model for the future

1.4. Service Benefits

- Reduce speed to value and generate quicker return on investment
- Maximise platform speed, responsiveness, and uptime
- Automation self-sufficiency; reduce reliance on consultancy partners
- Reduce cost of operations and drive greater benefits
- Shorter automation and agentic building cycle time
- Maximise utilisation and deliver more with fewer licenses/consumption
- Increase operational efficiency and create stronger links to the business
- Introduce further Agentic AI capabilities
- Develop sustainable plans for growth and scale
- Transform the business through automation and agents

1.5. Services Offering

SS&C Blue Prism Professional Services are available to support any aspect of your automation and Agentic AI programme. They apply across the entire SS&C Blue Prism product portfolio and can enhance any stage of the automation and Agentic AI journey, regardless of whether you are just starting out or have an experienced practice.

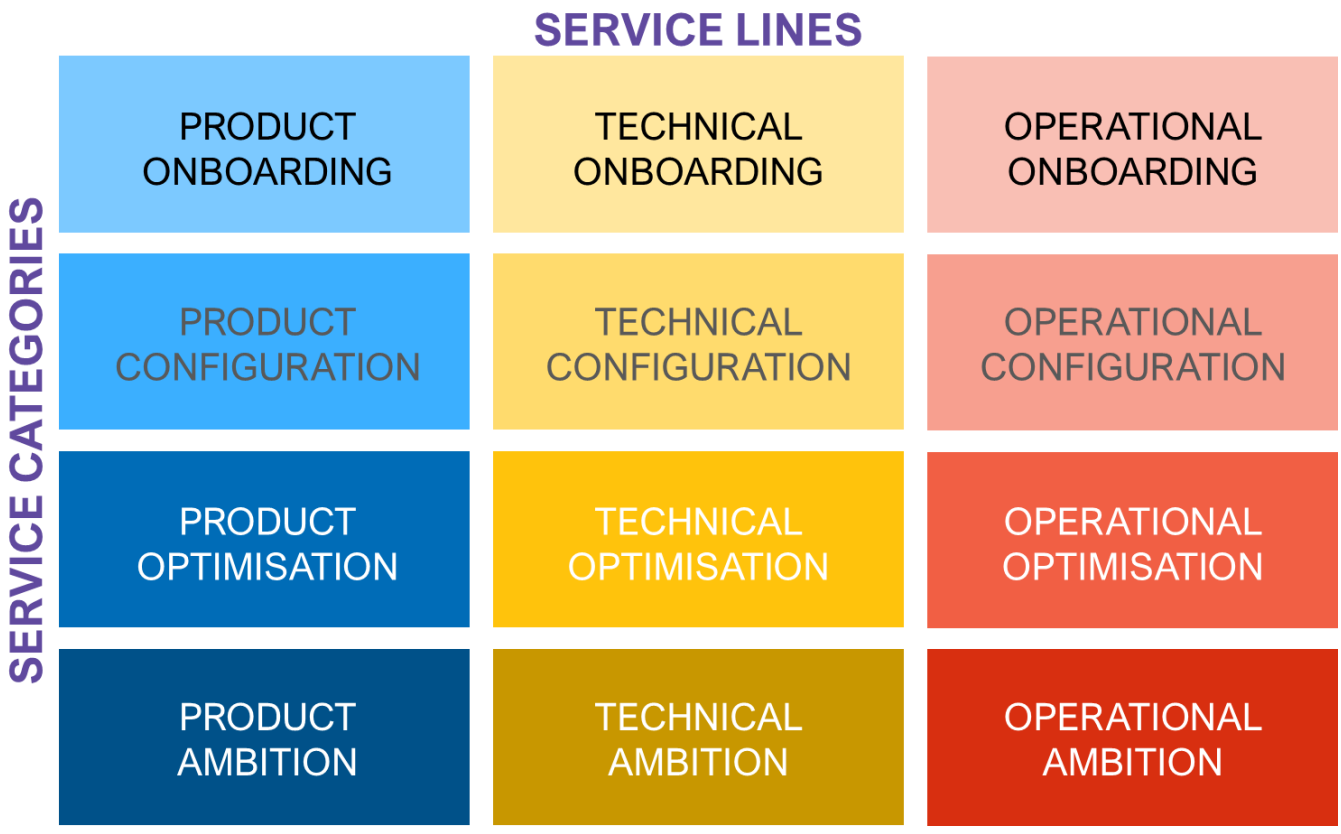
Services delivered under three service lines, which determine the skillset that is being applied in the delivery as shown below:

Product	Technical	Operational
How to use our solutions. If you can do it through the user interface, or use an API, our consultants know how.	How our solutions fit together and how they work once you get under the covers.	How the business should be set up to make the best use of the SS&C Blue Prism automation and Agentic AI solutions.

Across these three service lines there are four service categories. These describe the type of engagement that is being delivered, defined by the stage of the automation journey and the level of knowledge that needs to be transferred to the recipient. The four service categories are as follows:

ONBOARDING	Helping customers build their capability. Getting them started with new products and ideas so they can be self-sufficient
CONFIGURATION	Setting up products or processes to meet business needs and providing customers with new skills and capabilities
OPTIMISATION	Optimising an existing solution or process so that it works better, more efficiently, delivers additional value – or all three
AMBITION	Providing a plan for how to drive success over the long term and ensuring future scalability. Coaching and mentoring

Each of these categories can be applied to any of the three service lines, resulting in the following matrix:



The range of the SS&C Blue Prism Services Offering, means that it does not matter:

- where you are in your automation and Agentic AI journey
- whether you are looking to address needs relating to the platform or your operational structure
- what the level of expertise is within your automation or Agentic AI teams
- whether you are looking to the long or short term

- whether you have a specific issue or you are simply looking to enhance your internal capability

For any given situation, the SS&C Blue Prism Professional Services team can add value to your organisation.

1.6. Roles and Capability

With decades of Intelligent Automation across a wide and diverse range of roles and now in the Agentic AI space, SS&C Blue Prism is able to deploy resource types that align with your specific needs, whatever they may be. Personnel categories available to support the growth of your automation and Agentic AI deployment include:

- **Senior Consultant:** With at least 5 years' experience of SS&C Blue Prism in the Intelligent Automation space, Senior Consultants have a wealth of experience gained through thousands of hours of Blue Prism interaction and numerous client engagements across a range of business verticals. With understanding that spans all three Service Lines, they have the standing to lead large-scale engagements and will drive projects at the executive level. Senior Consultants hold multiple SS&C Blue Prism accreditations and typically also hold an internal knowledge transfer role, acting as mentors both internally to SS&C Blue Prism as well as to customers
- **Technical Consultant:** A specialist in the architecture of SS&C Blue Prism products from both a software and infrastructure perspective, Technical Consultants typically have at least 3 years' SS&C Blue Prism experience. They will have delivered numerous projects requiring the design, implementation, testing, and commissioning of SS&C Blue Prism platforms on-premises and in the cloud. Their deep knowledge of the technical product gives them the skills required to assess, optimise, and remediate existing SS&C Blue Prism implementations and to manage connectivity between Blue Prism and third-party services. Many of the assets available on the Blue Prism Digital Exchange have been authored by Technical Consultants
- **Consultant:** With a wealth of knowledge relating to the SS&C Blue Prism platforms as operated through the user interface, Consultants also have an extensive understanding of operational best practice and can provide insight into both tactical and strategic use of the solution. Benefitting from numerous growth engagements, they have the capability and temperament to support growing automation functions in a range of diverse business types. They use this expertise to drive speed to value and to support the transition to a scaled automation estate. Typically having at least 3 years' Blue Prism experience, the Consultants will build operational capability within your team whilst ensuring the effective configuration of the SS&C Blue Prism product portfolio.
- **Business Analyst:** Focussed on the design and delivery of enterprise-grade SS&C Blue Prism automations and Agentic Workflows, the Business Analysts are adept at identifying the potential of candidate business processes and quantifying their eventual value to the business once automated. Their logical and analytical mindset is ideally suited to discovery and delivery projects where they can apply their SS&C Blue Prism expertise to guide clients on their automation and Agentic AI journey. With a pragmatic approach to delivery, the Business Analysts will deliver impartial and realistic advice on the right approach to automation and will engage with business sponsors to develop detailed documentation including automation/workflow designs and business cases.
- **Automation/Agentic AI Developer:** Working exclusively to deliver validated and approved SS&C Blue Prism processes and Agentic Workflows, the Automation/Agentic AI Developers nevertheless possess a huge volume of knowledge with respect to the delivery of good practice. Their skill helps client deliveries, particularly in the SS&C Blue Prism Cloud and SS&C Blue Prism WorkHQ space, benefit from Objects, Processes, Agentic Workflow, Agents and Connection and other assets that support efficient operation, speedy action, and a low volume of unexpected exceptions/low confidence.

- **Project Manager** Crucial to the smooth and efficient delivery of SS&C Blue Prism professional services engagements, the Project Management team provide a dual role, both orchestrating and de-risking complex SS&C Blue Prism engagements. They define engagement timelines, coordinate resources, and support both the delivery team and client resources. Their input not only maximises the effectiveness and reduces the cost of in-flight projects, but also supports the ongoing improvement of the entire SS&C Blue Prism Services portfolio through the application of lessons learned and the implementation of clients feedback.

1.7. Termination Terms

Termination of any given managed services engagement is defined by specific termination clauses agreed between the parties within the statement of work specific to that service.