



G-Cloud 15

Strategic Roadmap & Business Case Creation

STRATEGIC ROADMAP & BUSINESS CASE CREATION

Service Description

This service helps organisations define strategic roadmaps and business cases for cloud and digital change. It provides structured assessment, option analysis and financial justification to support informed decision-making, prioritisation and investment planning before committing to delivery.

Key Service Features

- Strategic assessment of business, technology and delivery readiness
- Definition of target operating and technology models
- Options analysis covering cost, risk, benefits and feasibility
- Development of phased, prioritised transformation roadmaps
- Business case creation including costs, benefits and assumptions
- Financial modelling to support investment decisions
- Stakeholder engagement and decision facilitation
- Governance and assurance frameworks for roadmap execution

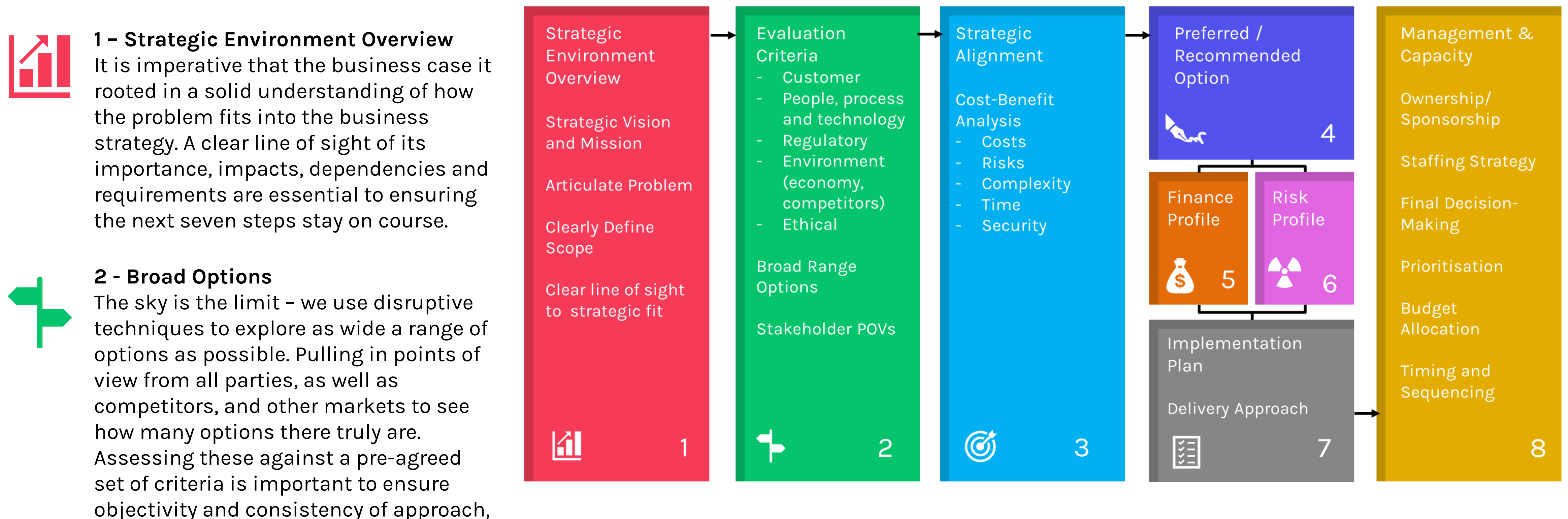
Key Service Benefits

- Clear, evidence-based decisions on cloud and digital investment
- Reduced risk of committing to poorly defined initiatives
- Improved alignment between strategy, technology and delivery
- Stronger financial justification and transparency for investment cases
- Greater confidence in prioritisation and sequencing of change
- Shared understanding and buy-in from key stakeholders
- A clear, actionable foundation for subsequent delivery services

APPROACH - STRATEGIC ROADMAP & BUSINESS CASE CREATION

The Broadstones Business Case Canvas provides a clear eight-step process to articulating the options around achieving a strategic objective. It also ensures all options are assessed objectively to and presented with realistic costs, timescales and benefits. Strategic alignment and agreed evaluation criteria set the bedrock to ensuring the recommendation is the most robust and definitive option to achieve the defined scope.

Each of the eight steps has its purpose, sub-structures and processes to ensure it aligns with best practice and encourages disruptive and innovative thinking to be supported.



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3 – Strategy Alignment

Step two's evaluation will result in a short-list, that needs to be analysed to a greater level of depth. Here we explore 5 main areas that are needed to be able to roll back to the output of step one and ensure that line of sight has not been lost. Considerations such as security, complexity and time are essential as these can all alter the strategic fit and change the outcome.



4- Recommendation

The shortlist is ranked, and the top option is then articulated in a robust, holistic and practical way to enable all parties a clear understanding of what the decision is they will be asked to endorse or approve.



5 – Finance Model

The preferred option is then commuted into a details finance model – depending on the business structure and parameters this may be a P&L, or a Project Bid, or an Investment request. Regardless of the model this will include both the benefits of the model and the implementation and operational costs.



6 – Risk Profile

Against the background of the organisation's risk appetite framework a full risk assessment is completed to demonstrate who it is likely to interact with tolerances, thresholds and regulations



7 – Implementation

At this stage the practicalities of deliver are consider – the approach – is it suitable for Agile or does this require Waterfall. We rule out no options and chose based on what is best for the specific situation



8 – Management & Capacity

It is essential that everyone knows what is being asked for them. Who is going to sponsor and own this business case, what does doing this mean for the rest of the organisation – does it impact others' initiatives – and in financial, time or scope? What are the budget and staffing considerations or decisions that are required.

This is a starting point, as it is key to ensure that as engagement progresses the approach is customised to the specifics of the area, leader, team and outcome. The AAA of Customisation that Broadstones employs is detailed below.

APPROACH - STRATEGIC ROADMAP & BUSINESS CASE CREATION

The creation and delivery of a new Operating Model requires a mix of discrete analyses and on-going reviews and processes. Change takes time to put in place and even longer to embed, and the world never stops, so creating a flexible framework that can bend and evolve with the world us is critical to delivering something that will be relevant when finished and will endure. We believe this needs 7 aspects in totality.

Future State Vision builds a vision of an improved future state and the requirements for creating new services and systems. *(note this is covered off in a separate SDD)*

Operating Model Design is the high-level design principles, models and decisions made that now need to be translated into a programme of changes to be delivered in a coordinated and effective fashion *(note this is covered off in a separate SDD)*

Governance & Management ensures oversight, MI collation, reporting, and information sharing is completed in a standardised way to support delivery across the range of aspects, teams, timescales and benefits profiles. This are creates the dashboards to enable effective decision making and communication to all forums and impacted parties.

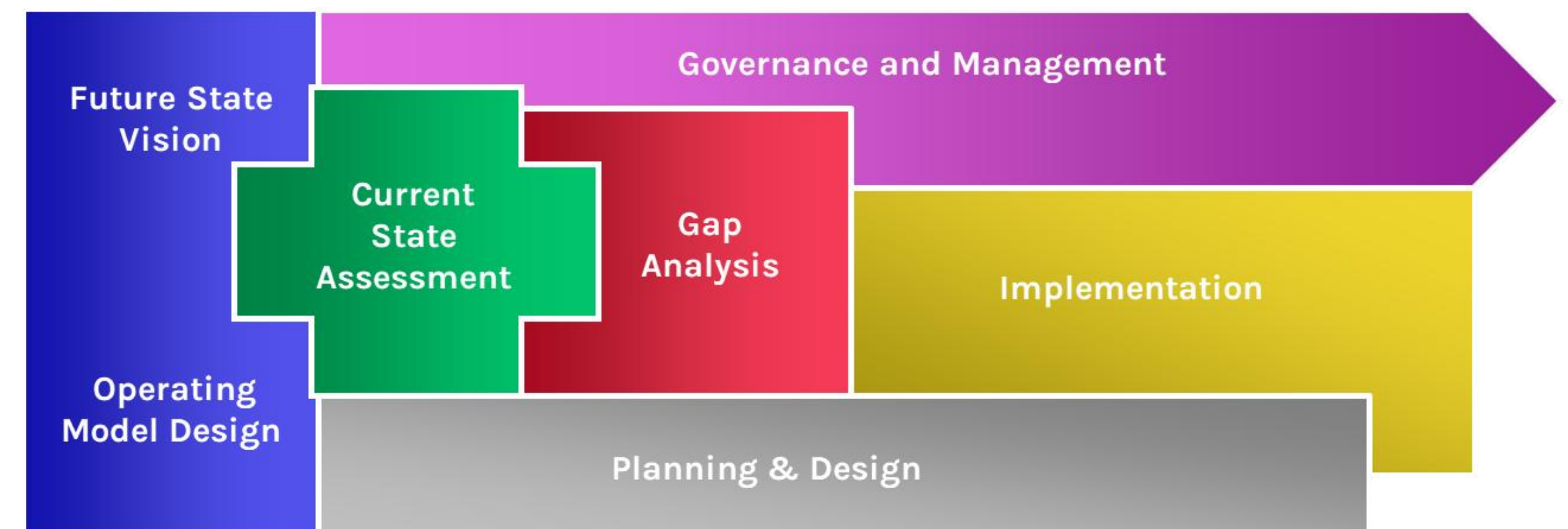
Current State Assessment establishes a strong understanding of your organisation's business, information and data management environment.

Gap Analysis analyses and quantifies gaps between the current and future state. It forms the basis of requirements.

Planning & Design plans how your revised business, information and data management environment will operate once the future state is implemented.

Implementation builds your organisation's new interoperable state into its business using common tools and solutions. It also reminds you to monitor new processes for ongoing improvements.

For the purposes of this SDD we will assume that the first 2 (purple box) have been provided as inputs, and so will cover the remaining 5 steps.



APPROACH - STRATEGIC ROADMAP & BUSINESS CASE CREATION

Governance & Management ensures oversight, MI collation, reporting, and information sharing is completed in a standardised way to support delivery across the range of aspects, teams, timescales and benefits profiles. This area creates the dashboards to enable effective decision making and communication to all forums and impacted parties. This is the home of the Agile PMO, utilising collaborations tools to manage backlogs, MI and reporting. Anything from Jira to ThoughtSpot to Tableau. Adopting existing or introducing new tools to ensure consistency of data points, collation methods and presentations. This is required as an enduring process daily throughout the lifecycle of the Programme. It is essential it is setup effectively at the outset, with all the required meetings defined, attendees agreed and TOR issued so there is no confusion from the outset what is required for each aspects and how it will be done. Clarity, consistency and consequences are the three C's to take note of here.

Current State Assessment establishes a strong understanding of the organisation's existing business, information and data management environment around processes, procedures and ways of working. In so doing it is exceptionally helpful to validate or where needed create process maps of the business architectures, technical inventories and architectures as well as conducting sessions to understand hurdles, gaps and inefficiencies staff or users have encountered when using the business process or system. These could be categorised around flow, throughput and resourcing models. Also exploring risk profiles, existing challenges that have resulted in work-arounds and employee satisfaction in those areas. It is important that this is done end-to-end starting and ending with the consumer, as other than regulatory requirements their voice should be the loudest.

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Gap Analysis analyses and quantifies gaps between the current and future state. It forms the basis of requirements that will enable the creation of the overall roadmap by exploring the dependencies, interconnectivity, value focus, resource profile and technical requirements. It is essential that this is not a theoretical exercise, but a practical one where consultation with end-users is fundamental to understanding how challenging the existing or future model may be. This enables consideration can be given to how those obstacles will be overcome. The solutions are almost always already known by those who experience the issue every day. They just need to be heard.

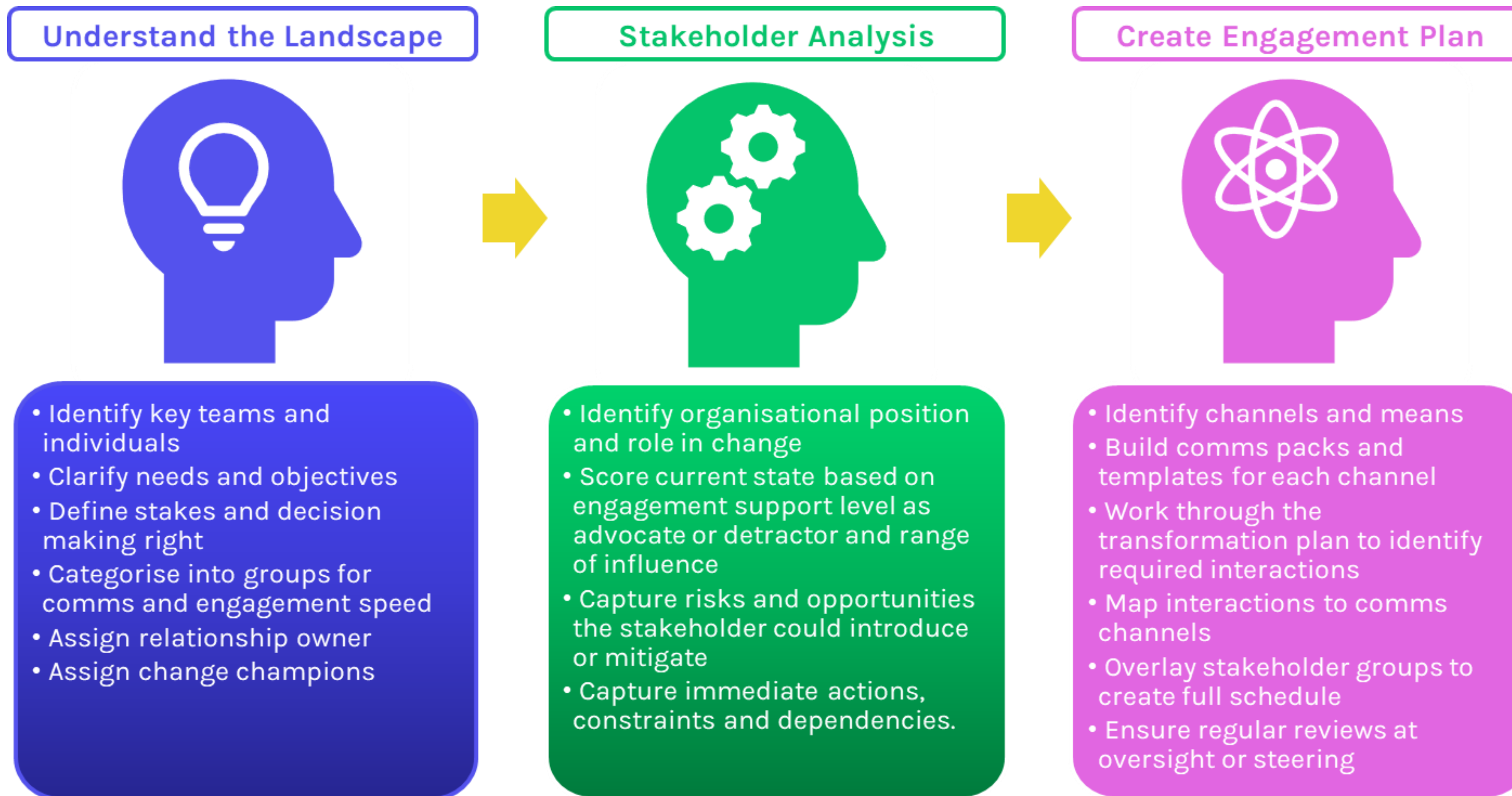
Planning & Design plans how your revised business, information and data management environment will operate once the future state is implemented. The gap analysis informs this phase by outlining the specific requirements. This phase can be challenging as it is all about balance – resources, existing infrastructure and processes versus the outlined desires new ways of working and executing the various aspects of the lifecycle designed. The planning and design component needs a lot of research into user needs, consulting with stakeholders and understanding internal skills and expertise. This is the stage where implementation roles need to be identified and assigned, so that everyone is aware, prepared and ready to go.

Implementation is about applying the right solutions and tools to implementation the decisions made within the planning and design phase. implementation carries on a lot longer than most project allow. It should not be considered complete until all new processes are embedded into business as usual (BAU), and a plan for continuous improvement is in place within BAU with owners and all associated governance and management migrated across

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Building a stakeholder plan is simple, the more complex and valuable aspect we will focus on is in building an effective, healthy relationship with the stakeholders. Representing and importantly, managing their needs and expectations to drive a stronger business case and operating model that we can all stand behind is core to building a successful transformation.



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The Stakeholder Engagement Plan then moves into maintenance, we will construct a process to keep the stakeholder map current and effective, updating stakeholder analysis and risks.

Broadstones will regularly take feedback from stakeholders on the impact and effectiveness of engagement and communication and their position against the transformation programme and maintain the stakeholder analysis asset to manage risk to the delivery of the Strategic Outline Business Case, High-Level Target Operating Model and Roadmap.

We will maintain the stakeholder map and engagement plan, reacting to any changes in roles, organisation structure or individuals that may change the stakeholder map or analysis.

This is a starting point, as it is key to ensure that as engagement progresses the approach is customised to the specifics of the area, leader, team and outcome. The AAA of Customisation that Broadstones employs is detailed below.

Why Broadstones?



About Us

INDUSTRY RECOGNITION

We are honoured to be recognised, for a third year in a row, as one the UK's Leading Management Consultancies by the Financial Times and Statista.

HOW WE WORK

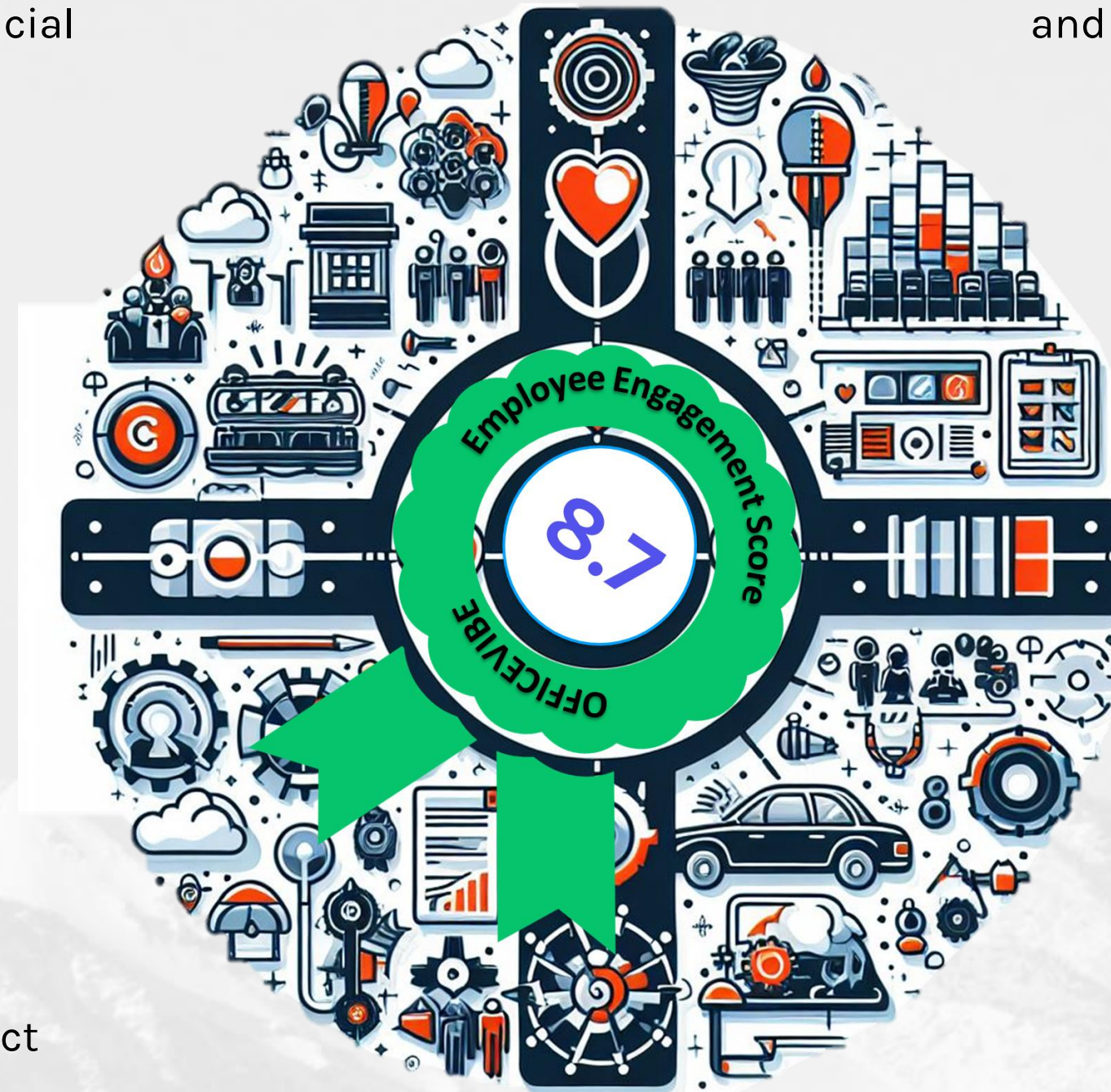
Clients opt for our services due to access to a broad range of experienced, industry skills and flexible engagement. Our clients get a great return on investment in Broadstones.

PROVEN TRACK RECORD

We work with clients ranging in size from micro companies and start-ups to Global FTSE 100 companies. We supply technology professionals and services, whether that's individuals, small or large teams, or fixed outcome, fixed price delivery of technology and business transformation.

Broadstones are not just an advisory consultancy, we also have extensive experience of hands-on delivery and product build that keeps services and delivery practical.

Broadstones have strong business partnerships so that we are nimble and can engage with a range of products with local, nearshore and offshore capabilities.



Our Values

PASSION & POSITIVITY

Our key hiring value is that our team members are passionate about our culture and our business and remain positive because that is what inspires others.

DEMONSTRATE COMPLETE INTEGRITY

Every individual in the team adheres to our principles of authenticity and honesty. We say what we mean, do what we say, whilst being sensitive to the situation. We don't engage in politics.

MAKE AN IMPACT

Our clients engage us because we get things done quickly and effectively, defining the road ahead. We work with experienced and talented people that create lasting client partnerships.

UNDERSTAND & EMPOWER OUR CLIENTS

We leave our clients in a position where they are self-sufficient. Our proven methods ensure their business moves from strength to strength without the ongoing need for our support.

SELF-AWARENESS

Our team are graceful under pressure, respectful always to each other and the client, regardless of the challenges faced. Our team never create situations, they resolve them with awareness, and balanced counsel.

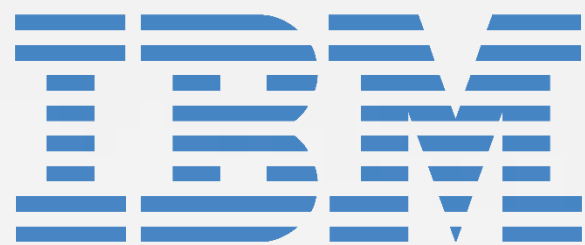
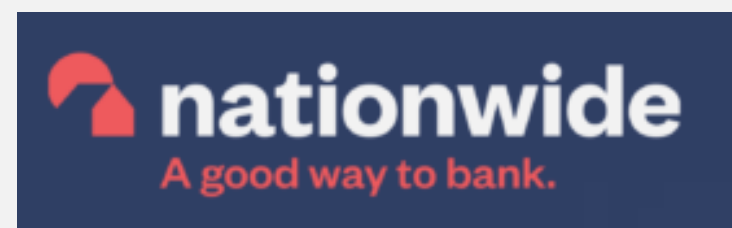
BUILD CREATIVE APPROACHES

Our team's and individuals' outputs totally wow the client. We use defined and proven roadmaps that are adapted to align with the culture of the organisation and its required outcomes, acknowledging that the needs of every organisation are different.



Broadstones Supply To a Wide Range of Clients

broadstones^{tech}



Broadstones Consulting Capabilities

Technology is the cornerstone of your business and our skills in this area are unrivalled. We provide the know-how to support your vision for growth.



DIGITAL TRANSFORMATION

Coordinating the complex journey to Cloud and maximising value from your Digital platform and product investments.



STRATEGY & OPERATING MODEL

Innovative approaches to effective enterprise operation and growth, combining capability and talent, technologies and approach.



CHANGE LEADERSHIP

Experienced hands to lead complex change and rally your own team, suppliers, vendors and partners behind the cause.



GRC & CONTROLS

Ready for your regulator. Making governance risk and compliance simple with mature, proven playbooks, frameworks and operating models.



AGILE & DEVSECOPS

Leadership in Agile adoption and scaling, maturing Scrum to DevSecOps. Agile PMO implementation and Jira and Azure DevSecOps best practice adoption.



PORTFOLIO DESIGN & ROADMAPPING

Translating goals and strategy into easy to understand and implement activities that can be simply tracked and managed



ENTERPRISE MATURITY ASSESSMENT

Enhancing enterprises through innovative products & people and Skills Assessments. Technology and controls implementation with WoW changes and operations.



BUSINESS OPTIMISATION

Optimising business to get best value from technology. Through business design and operating model. Rapid workflow design and implementation. Shared Services.



TECHNOLOGY DELIVERY, RUN & OPTIMISE

An agile, iterative approach to transforming technology operating models. Define and monitor success metrics & build new capabilities through Network, UX/UI, CI/CD, etc.

Who Are We?

With decades of experience and exposure of seeing digital and then cloud transformation done in ways that don't deliver the abundance of business benefits promised, Broadstones is driven to change that story for its customers. Our Vision is to unlock an abundance of business potential through innovation and inspiring a team behind an idea to ignite Cloud, DevOps and Digital transformations. We do this with tailored, specific, efficient and innovative services and products delivered in a straight-talking, respectful, insightful and creative way.

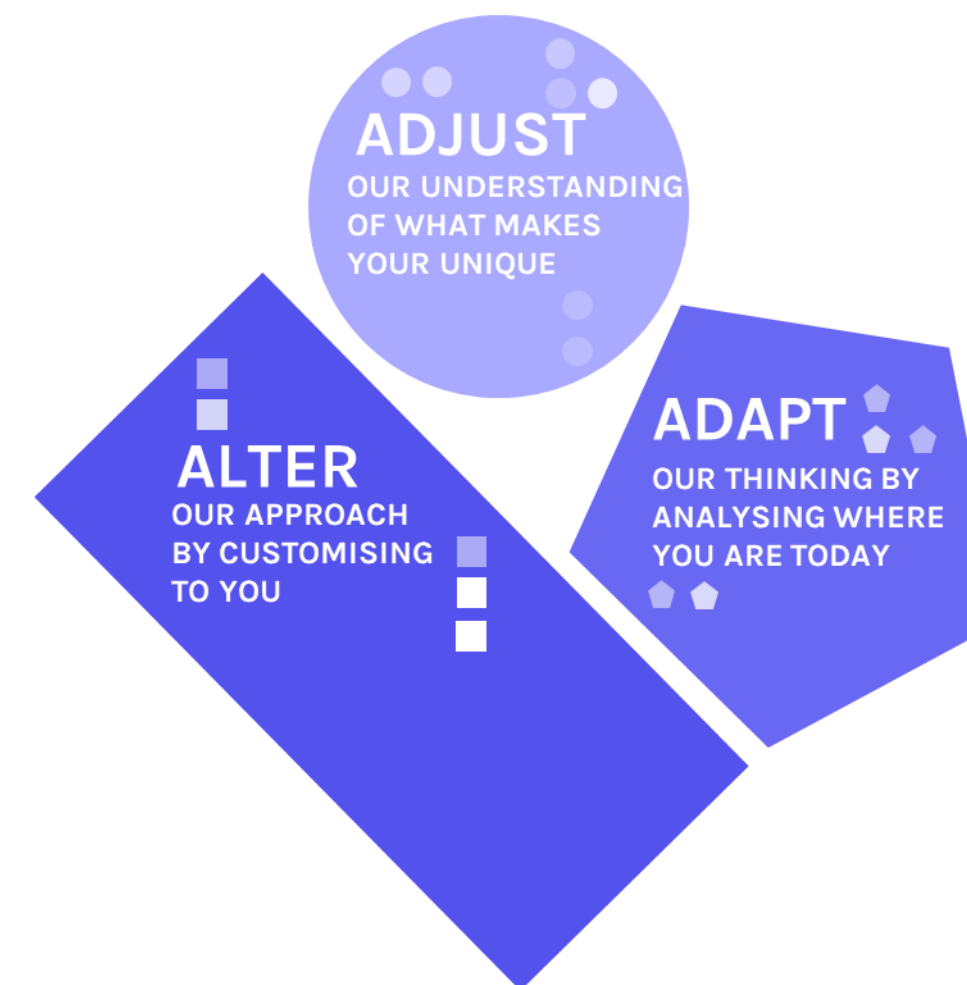
Powered by Understanding

We get to know you better than anybody else so that our solutions directly address your unique challenges while bringing the best industry knowledge and experience to bare.



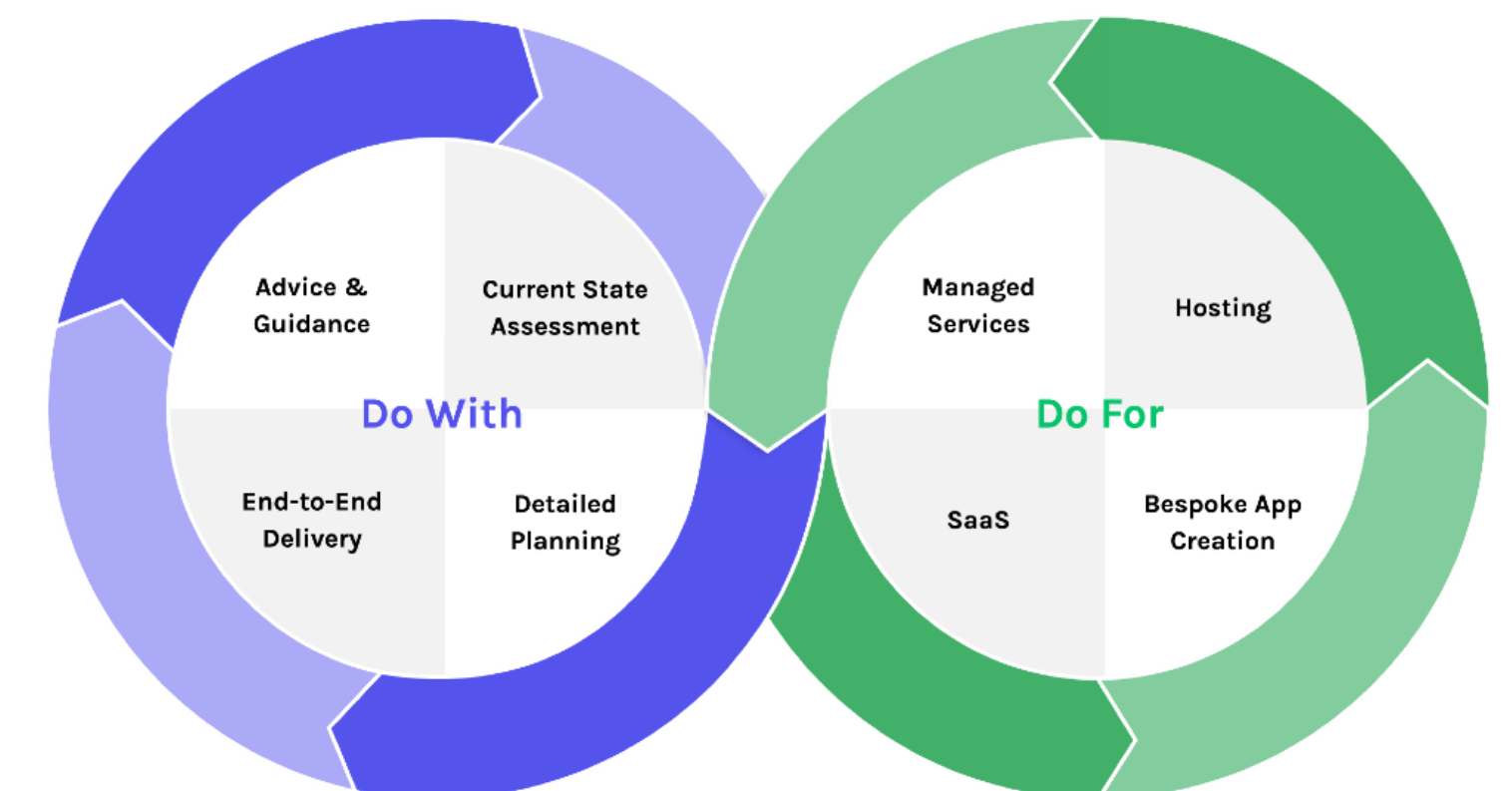
AAA of Customisation

No two companies are the same, so no two solutions can be. We ensure that what we do is customised in every way that matters.



Products & Services

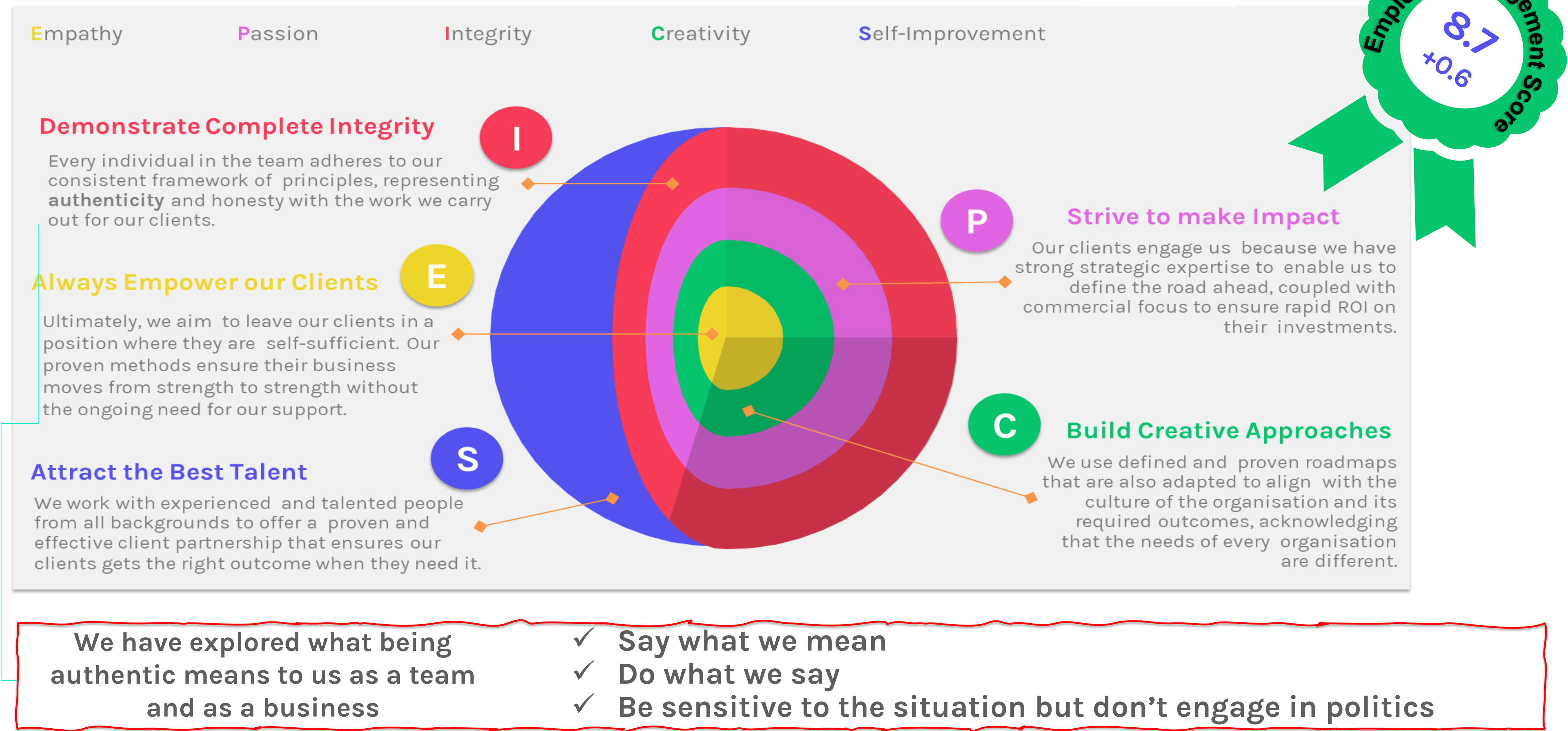
We can work with you however you need us to. We call that Doing With Services or Doing For Products. Broadstones approach your challenge as their own – providing solutions that are considered, innovative, secure, reliable and engaging.



Client Focused

We are passionate about ensuring we get value (of all forms) for you. Here are some of the clients who we have successfully helped to transform at pace, more effectively and sustainably in support of their hard-to-reach business and technology goals. We are here to help clients get value from investment in technology or other service providers, giving the client the skills and capacity required for an effective transformation. We always leave clients better equipped to own their own journey.

Core Values & Behaviours



Sustainability

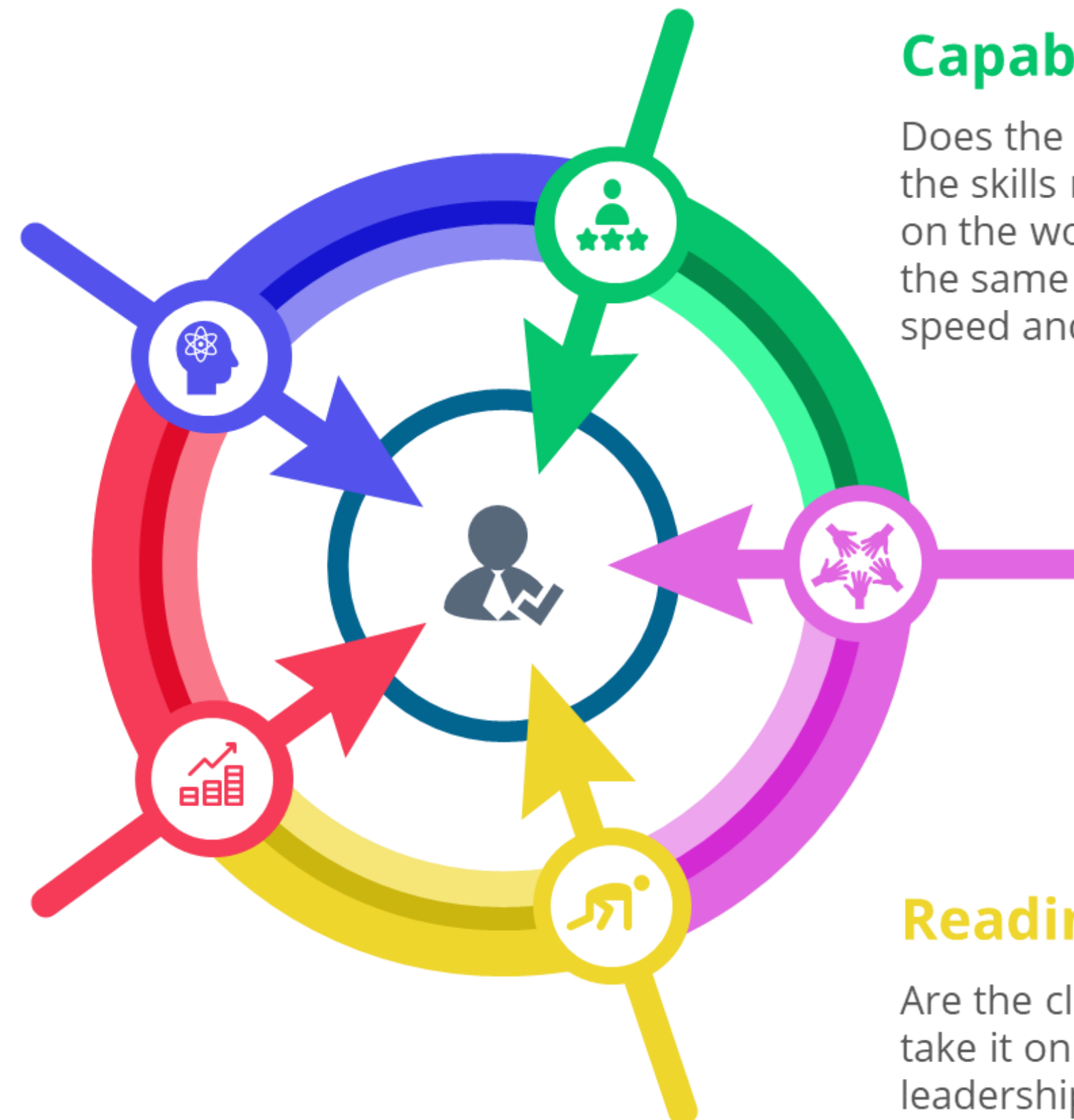
Broadstones never wants to leave a client unprepared or unaware, but we do want to leave them with sustainable solutions and clear ways forward. We believe there are 5 key areas that a client has to have in place to be able to sustainably take on the work we have been delivering with them. Eyes wide open is our belief so we provide insight into the risk profile and next steps both bottom-up and top-down that clients need to take on to continue to progress at the same pace, with the same quality and drive.

Understanding

Does the client team have a good understanding of what is required, why and the consequences of not following through

Investment

Does the client team have the necessary investment (trust, empowerment and funding) to progress successfully



Capability

Does the client team have the skills necessary to take on the work and progress at the same competence, speed and quality

Capacity

Does the client team have the capacity to take on the work – based on resourcing levels, demand and complexity

Readiness

Are the client team ready to take it on – mindset, leadership, culture, documentation, training, access and process

We complete this review as standard in the last month of a contract to ensure our handover is informative and pertinent.

We are also willing to complete this on other suppliers or to return after a period of time to review how work has been sustained. Be that 6 or 12 months later as per planning and review cycles.

Recent Work



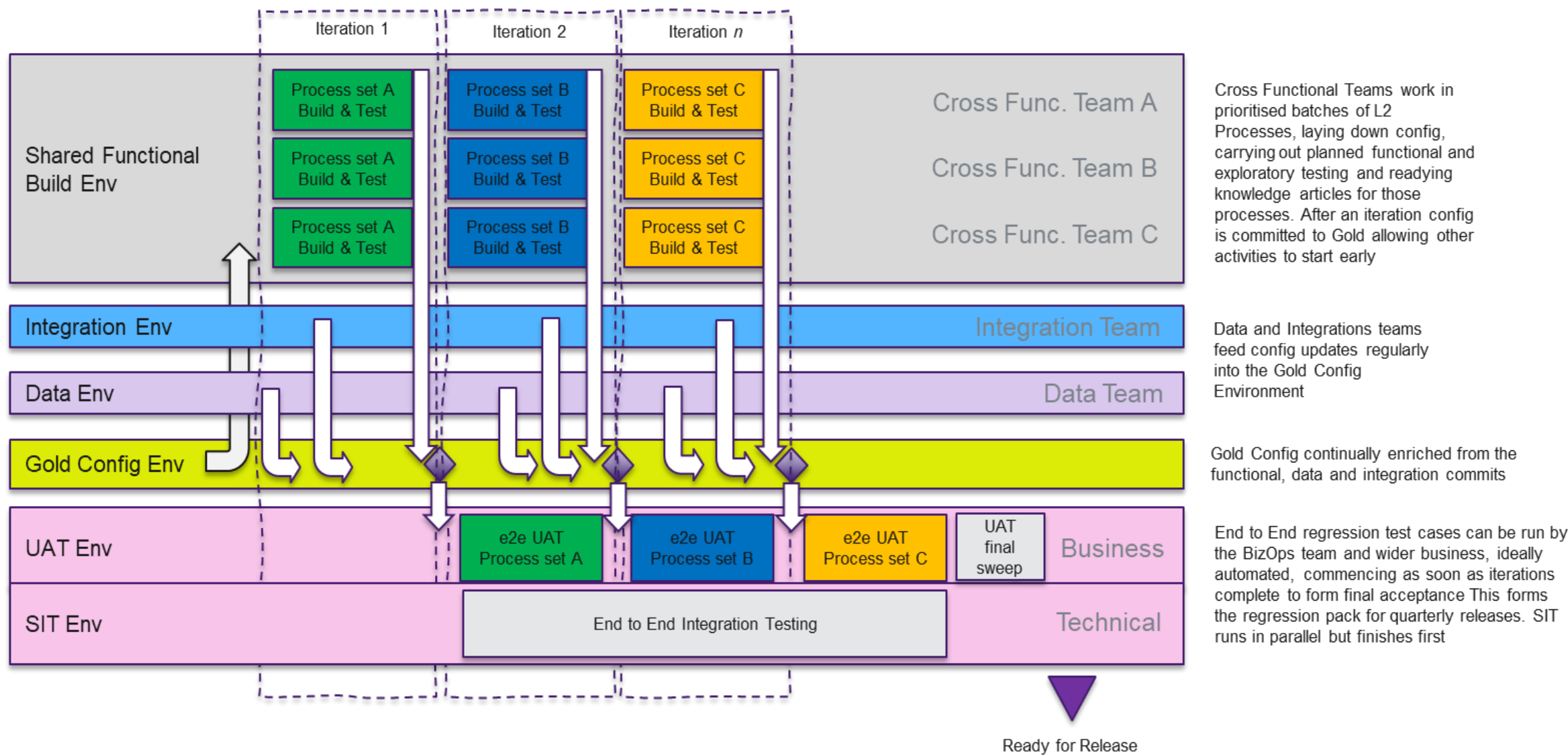
Agile Transformation for Major Technology Change

A major client programme delivering a new ERP and HR system was in crisis due to the challenges introduced by COVID-19. We had to deliver the outcome of migrating from on premise to a new Cloud based ERP system within same timeframe, with a significantly reduced team, and with a significantly reduced budget.

Broadstones advised on agile solution options to face into this challenge and led the transition to the chosen agile model, allowing the ERP programme to continue by removing waste and increasing delivery efficiency. This was a significant challenge as this was done on the fly in response to the crisis, without loss of pace, with an entirely remote team of permanent staff and suppliers who had not worked in agile before. This was made possible by clarity of leadership, clear method, agreed ways of working, supported with consistent use of agile tooling and standards, automated reporting and clear governance information, sense of pace and a cultural shift in how the business operated.

What we did to make transformation happen

1. Broke down the scope of the transformation into a smaller set of processes that small teams can deliver in increments and sprints mitigating risk in a single, larger release deployment
2. Defined and implemented standards for new cross functional teams delivering workable business processes in increments and the underpinning work structures in Azure DevOps to capture consistent transparent data for programme decisioning
3. Helped teams adopt the new standards and ways of working so that programme increments could be delivered reliably and consistently for timeboxed delivery
4. Automated all reporting through Azure DevOps, increase transparency of status and progress, allowing other teams to react and adjust their iterations accordingly to meet the increment goals



	Build & Test Iteration	Build & Test Iteration	Build & Test Iteration	SIT Iteration
Incremental. Processes are prioritised and build and test is conducted process by process in each iteration, incrementally getting processes ready for SIT.	Feature - L2 Process - Build - Systems Test	Feature - L2 Process - Build - Systems Test	Feature - L2 Process - Build - Systems Test	Feature - L2 Process - Bug - Retest
Sequential. Build and business executed smoke testing is conducted prior to a supplier led process playback that will execute by demo all Systems Test cases. As Processes based playback are accepted by the business, Systems Test Cases are approved.	Feature - L2 Process - Build - Smoke Test	Feature - L2 Process - Build - Smoke Test	Feature - L2 Process - Oracle Playback - Systems Test	Feature - L2 Process - Bug - Retest
Mix; Incremental & Waterfall. Oracle based functionality is prioritised process by process and build and test is conducted in each iteration. Activates for non-oracle systems are planned and interlocked through Azure DevOps and progress represented in scrums and increment planning but are executed through the local delivery methods of those system owning teams.	Feature - L2 Process - Oracle Build - Systems Test - Build for other systems	Feature - L2 Process - HAL Build - Systems Test	Feature - L2 Process - HAL Build - Systems Test	Feature - L2 Process - Oracle Bug - Oracle Retest - Non-Oracle Bug - Non-Oracle Retest

Our Blueprint for Agile iterative transformation was tailored to interlock with a range of suppliers change methods in interfacing systems

Operating Model for Cloud SaaS

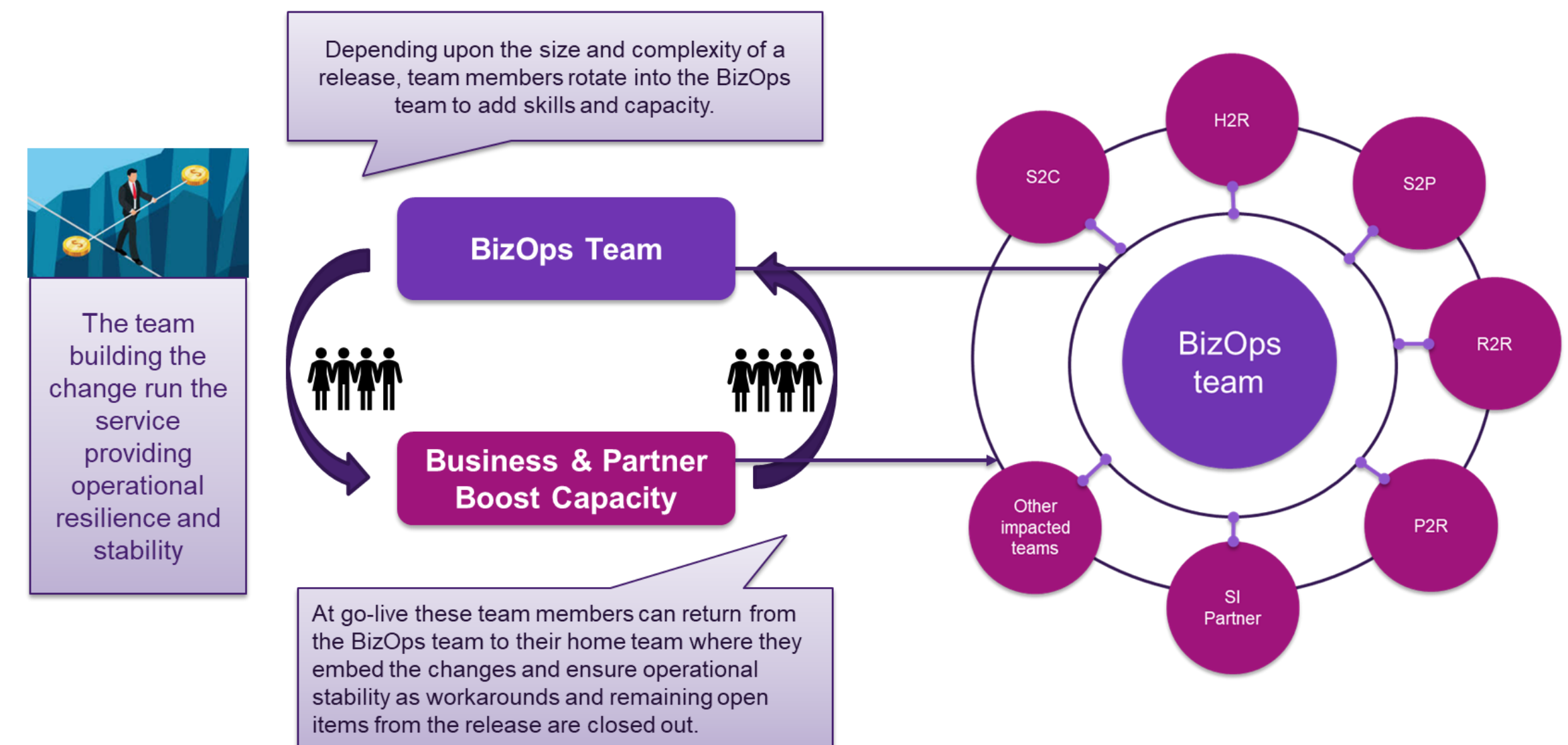
Our client adopted Oracle Fusion Cloud to help their organisation avoid large capital transformation programmes and take an evergreen approach to keeping their technology estate current and quickly realise benefit from new functionality. The challenge was that business needed to have a flexible, nimble way of working to adapt to short notice mandatory changes in the SaaS products and capitalise on new optional functionality that drive business value.

Broadstones designed and implemented an Agile Operating Model based upon DevOps principles to form a Business Operations (BizOps) team design.

This model accompanied by a practical, hands-on leadership of the change on the ground with the business, readied the business for this major change in ways of working, supported by newly crafted roles, processes and Agile tooling for portfolio management, change road mapping, change technical delivery, technical and business testing and business change.

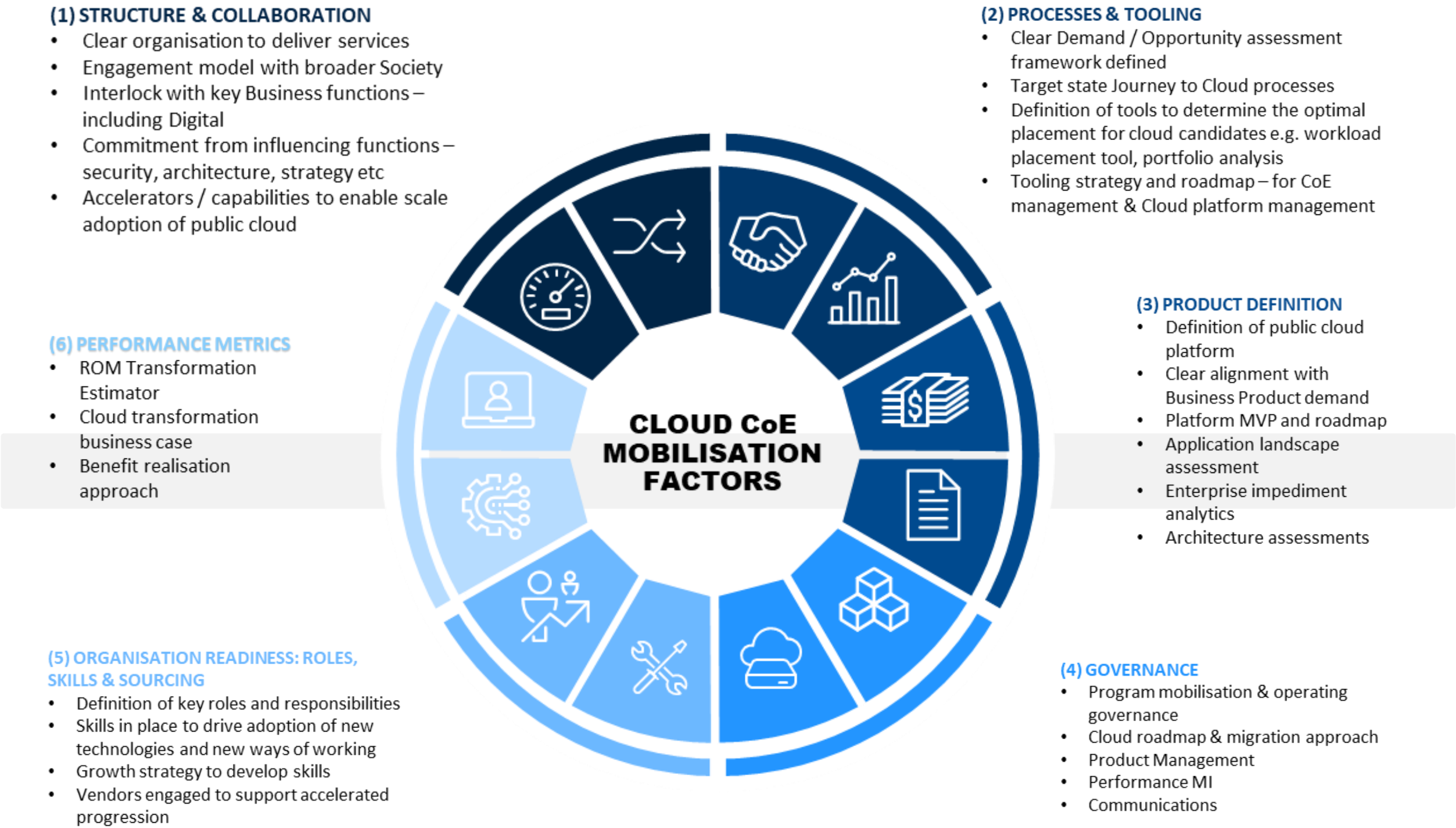


The BizOps Team has all the required skills in the team to deliver business processes and systems changes into production in a self-governed, rapid and repeatable manner. This team self-organises to optimises and extract ongoing value from the available business software stack. Agile Tooling and Agile Ways of Working were fully adopted to enable this, using Azure DevOps to plan and manage activities with Scrum used to help the team self-organising around their day to day and week to week commitments.

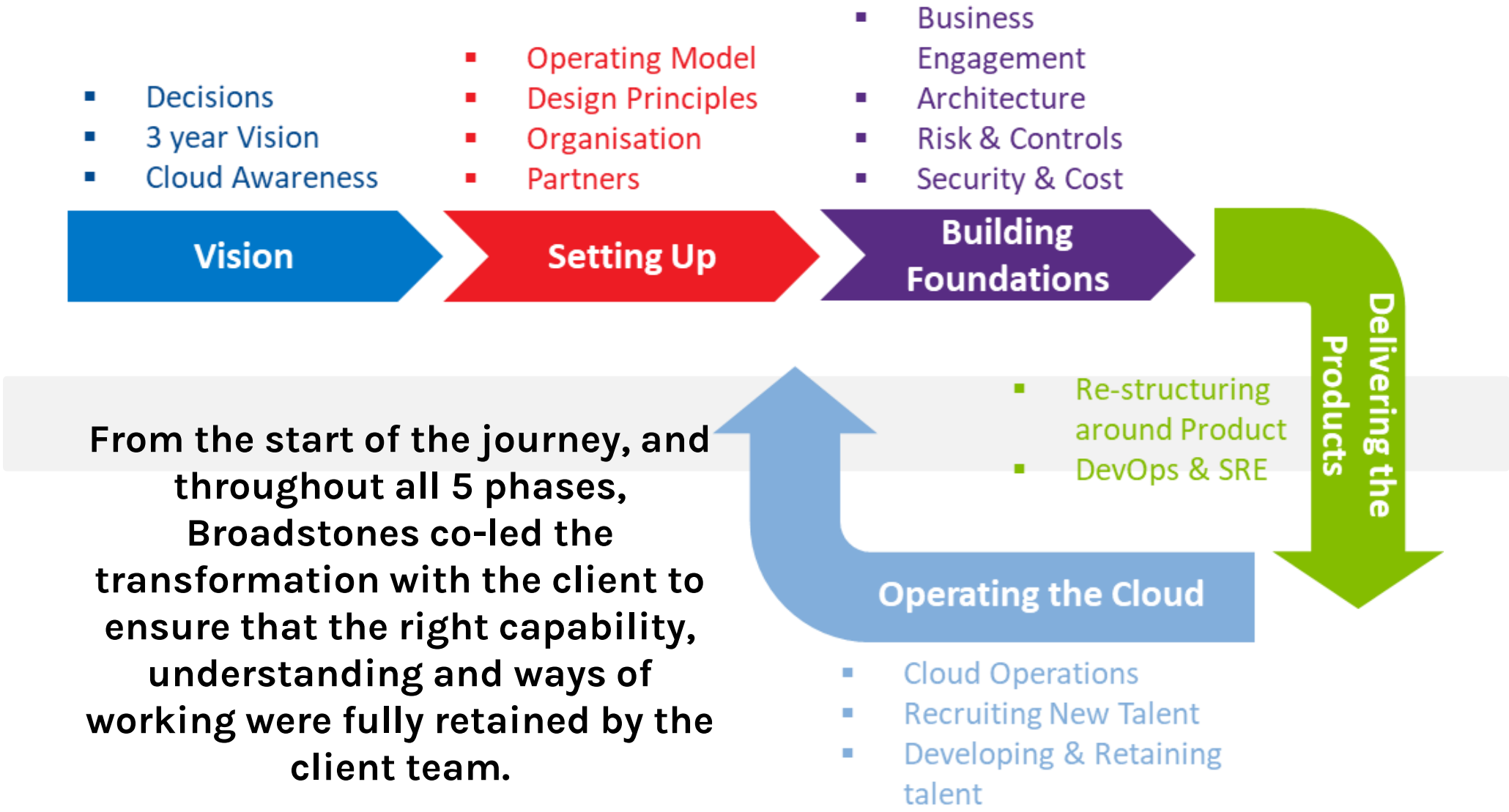


DevOps Cloud Centre of Excellence Setup

During 2020, we were asked to create and run a Cloud based product producing factory; a Cloud Centre of Excellence. This DevOps based adoption took place over a period of 8 months culminating with the release of its first product; an enterprise class, secure, Platform as a Service (PaaS) capability built on AWS suitable for financial service workloads. A second platform utilising MS Azure fast followed on quickly in subsequent months to provide cross cloud resilience and exit strategies.



To ensure progress, we continuously assessed our maturity against industry targets



The platforms embraced many innovative concepts and featured continuous integration and delivery pipelines to ensure rapid change and automated security. The platforms were ephemeral and therefore reduced the environment provision time from months to minutes for project teams across the company building applications and services upon a common, Cloud based platform. Broadstones led the construction of a controls framework to manage risk in the Cloud product set.

The rapid pace kick-started a cultural shift within the organisation and demonstrated that it was possible to deliver enterprise class capabilities within a shorter timeframe than expected.

Case Study

Paysafe

Broadstones was engaged by Paysafe to develop a Cloud Operating Model to effectively manage and expand their cloud presence across AWS and Azure platforms. The objective was to create a lightweight yet comprehensive framework that outlined the vision, principles, components, and high-level design necessary for Paysafe's cloud adoption journey. The solution involved conducting a rapid architectural discovery phase to present options and recommendations, ensuring consensus on the outline shape of the Cloud Operating Model.

The outcomes included an Outline Operating Model that provided clarity on how cloud onboarding and operations would function consistently and efficiently within Paysafe's enterprise. This model was iterated into detail during full Operating Model construction and was aligned with key cloud stakeholders throughout its development stages. Ultimately, Broadstones enabled Paysafe to make informed decisions and streamline their cloud operations to support their rapid expansion in the cloud space.



Architectural Services Deployed:

- **Enterprise Architect**
- **Solutions Architect**

Case Study

Canada Life

Broadstones were engaged by Canada Life Europe to set enterprise architectural direction and construct an approach to modernise their technology landscape across the group.

Broadstones deployed an experienced technology team to accelerate Canada Life Europe's modernisation of their entire estate through Cloud adoption, as well as leading business architectural initiatives regarding working practices and strategic workforce planning and service outsourcing.



Architectural Services Deployed:

- **Enterprise Architect**
- **Solutions Architect**
- **Data Architect**

Case Study

Nationwide Building Society

Broadstones supported Nationwide Building Society on a journey to modernising the IT infrastructure and enhance digital capabilities. The scope of the work included conducting an in-depth architecture assessment and developing a strategy aligned with Nationwide's objectives, then executing that strategy.

We assisted in migrating critical systems to AWS and Azure, leveraging Terraform Cloud for automation, and transitioning to microservices-based architectures for improved agility and scalability. We established a dedicated SecOps team focused on cloud security, mapping the cloud technical strategy to security strategy. CI/CD pipelines were implemented to enable rapid and reliable software delivery, while security risk assessments were conducted to mitigate risks across the business. The results of this initiative were evident in the enhanced member experience, improved operational efficiency, and increased innovation and agility.



Architectural Services Deployed:

- **Enterprise Architect**
- **Solutions Architects**
- **Security Architects**
- **Network Architect**
- **Technical Architects**

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