Outsource Automation Solutions

Service Definition Document

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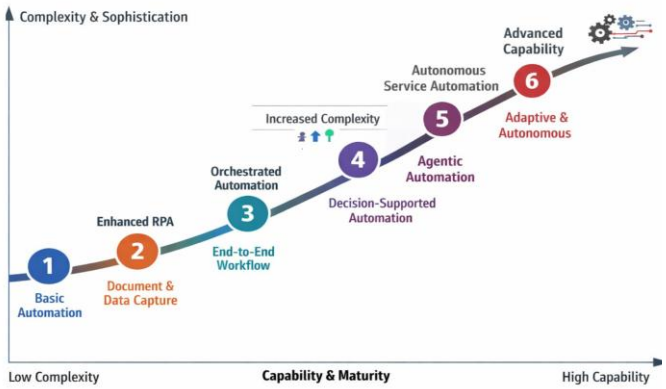
1 What We Can Do for You

1.1 Overview

OAS helps public sector organisations start with proven, low-risk robotic process automation (RPA) and progressively extend capability through orchestration and agent-led automation where this delivers clear operational benefit.

OAS provides agentic automation and orchestration services to help public sector organisations reduce operating cost, improve service efficiency and deliver better outcomes for residents. Services are designed to support organisations at different stages of automation maturity, from foundational automation through to more advanced, orchestrated and agent-led service delivery models utilising the latest AI tools and platforms.



The focus is on reducing avoidable manual effort, improving the flow of work across systems and teams, and increasing consistency in service delivery. Automation is applied pragmatically, with the needs of the service and the characteristics of the process determining the most appropriate technology. In practice, this typically means starting with proven, well-understood RPA, and introducing additional capability incrementally as confidence, capacity and service maturity increase.

As part of this approach, OAS can, where required, support the creation of a single, service-level view of the customer or resident. This capability is optional and introduced only where it improves service delivery. Rather than mandating a new system, OAS can work with an existing CRM or abstract relevant customer information from multiple applications in real time, providing staff and automation with the context they need while leaving data in place. For some organisations, this can reduce or remove the need to procure a new CRM, delivering significant cost savings while still enabling joined-up, consistent services.

This approach allows organisations to begin with achievable, well-understood automation and progressively adopt more advanced capabilities as operational readiness increases. Organisations are not constrained to a single level of capability and can move to more sophisticated automation, orchestration or agent-led interaction at any point where the service design justifies it.

By coordinating activity across services, OAS helps organisations reduce duplication, shorten turnaround times and improve visibility of work in progress. Automation and orchestration are introduced in a way that supports services to stabilise first, embed capability within teams, and then extend automation more widely over time. This enables staff to focus on higher-value activity rather than administration, while maintaining transparency and control over how work is handled.

Where required, OAS also supports the development of in-house capability, ensuring knowledge and operational ownership can be retained. This includes structured handover, documentation and support for internal teams to operate, maintain and extend solutions over time.

The approach supports both day-to-day service delivery and periods of structural change, including local government reorganisation. By enabling organisations to start conservatively, realise early benefits and scale capability in line with service need, services can continue operating effectively while establishing a strong foundation for longer-term integration, improvement and modernisation.

1.2 Core Services

OAS delivers automation and orchestration services through a structured, progressive model that allows public sector organisations to adopt capability at a pace aligned to service need, organisational readiness and risk appetite. Services can begin with foundational automation and extend incrementally to more advanced orchestration and agent-led interaction where this delivers clear operational benefit.

The core principle is that the service process determines the technology used, not the other way around. Capability is introduced conservatively, starting with well-established approaches and expanding only where it improves outcomes, efficiency or experience.

1.2.1 Foundational Automation (Robotic Process Automation)

OAS supports organisations to begin with foundational robotic process automation (RPA) as the entry point to automation. RPA provides a low-risk, well-understood means of reducing manual effort, improving accuracy and increasing throughput within existing service processes.

Typical use cases include high-volume, rules-based activity such as data entry, case updates, reconciliations, reporting and system-to-system information transfer. These automations are designed to work alongside existing applications and operating models, enabling early benefits to be realised without disruptive change.

Starting with RPA allows organisations to:

- Achieve tangible efficiency and cost benefits quickly
- Build confidence in automation within operational teams
- Establish governance, assurance and operational controls
- Develop internal capability and ownership in a controlled manner

RPA is implemented as part of an orchestrated service model, ensuring that early automation does not limit future options. Automations can be extended, reused or refactored as service needs evolve.

1.2.2 Progressive Automation and Capability Development

As services mature, OAS enables organisations to progressively introduce additional capability where required. This may include document and data capture (such as OCR), rules-based decisioning, and assisted intelligence to support triage, classification and routing.

Some services may remain effectively served by RPA alone, while others may justify additional capability based on demand complexity, policy requirements or service expectations. Organisations are not

constrained to a fixed pathway and can adopt higher levels of capability at any point where the process design supports it.

This progression ensures organisations gain value at every stage, embedding automation into day-to-day service delivery while avoiding unnecessary complexity.

1.2.3 Agentic Automation and Digital Front Door

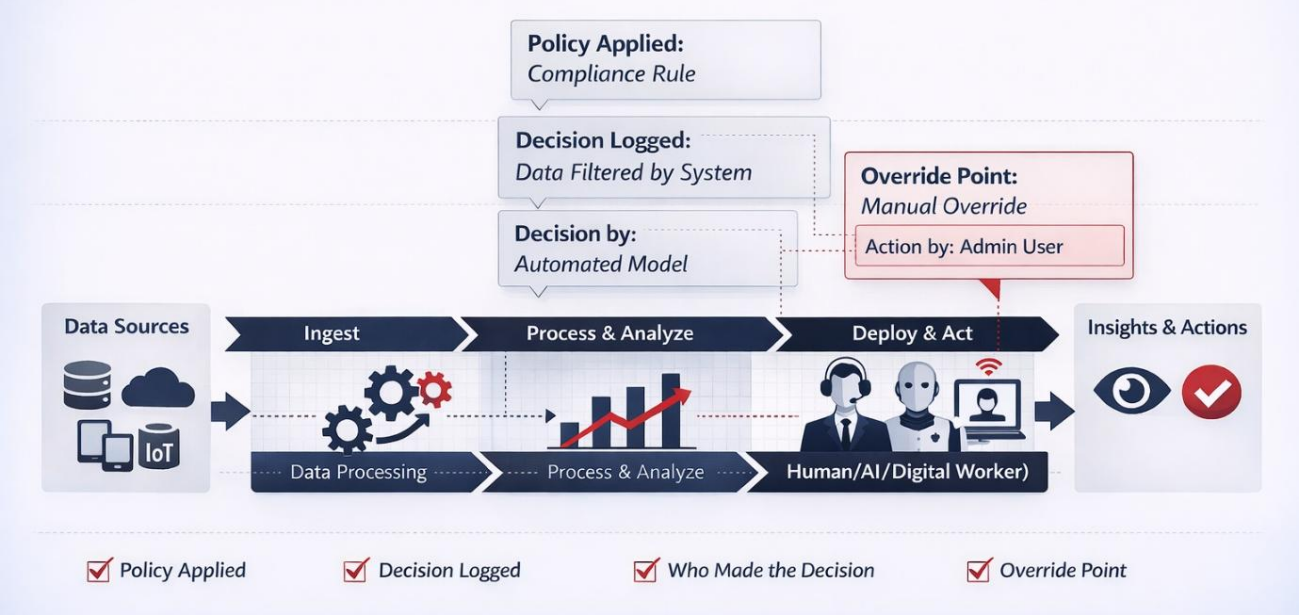
Agentic automation and digital front door capabilities enable services to move beyond simple task automation toward coordinated, outcome-focused service delivery. These capabilities allow requests to be initiated through conversational channels and progressed through a series of controlled steps that may include automation, system interaction and human intervention.

Where appropriate, artificial intelligence can be used to support elements such as intent recognition, information extraction or decision support. Any use of AI is applied selectively and within defined boundaries, ensuring it augments service delivery rather than introducing unmanaged behaviour or risk.

AI-enabled components are designed to operate within governance controls, including defined confidence thresholds, auditability, and explicit escalation to human staff where uncertainty, vulnerability or policy sensitivity is detected. This ensures that services remain decision-safe and understandable, while still benefiting from improved efficiency and consistency.

This approach allows organisations to introduce agentic and AI-enabled capabilities incrementally, applying them only where they add value and where appropriate controls are in place, while maintaining oversight, accountability and trust./

1.2.4 Orchestration and Workflow Management



Orchestration sits across all stages of the capability journey, coordinating activity between systems, automation, digital workers and human teams. It ensures work flows end-to-end across services rather than being managed as disconnected transactions.

Orchestration provides:

- Control over how work enters the system
- Routing and prioritisation across services and teams
- Visibility of work in progress and dependencies
- Governance, auditability and decision transparency

This ensures that as capability increases, services remain manageable, compliant and aligned to operational and governance requirements.

1.2.5 Integration and Digital Workers

Where direct integration is not available or not cost-effective, OAS deploys digital workers as a shared execution mechanism across services. Digital workers are used pragmatically and governed through orchestration, ensuring they support service outcomes rather than operating in isolation.

This approach allows organisations to modernise incrementally, improve flow across legacy and modern systems, and avoid wholesale system replacement.

1.2.6 Operational Areas Commonly Automated

OAS has experience delivering automation across a wide range of operational areas within both local government and NHS organisations. These are typically areas where demand is high, processes are repeatable, and manual effort creates avoidable cost, delay or risk.

The table below illustrates common areas of focus across both sectors.

Local Government	NHS / Health Organisations
Revenues and benefits	Patient administration
Council tax and business rates	Referral management and triage
Housing and homelessness	Scheduling and appointment management
Waste and environmental services	Workforce and rota management
Regulatory services	Operational and clinical support workflows
Customer contact and case handling	Data reconciliation and reporting
Finance, payments and reconciliations	Finance and payroll processes
HR and workforce administration	HR and workforce administration

These examples are indicative rather than exhaustive. OAS maintains a wider catalogue of automation use cases and delivery patterns developed across multiple public sector engagements.

Where appropriate, existing automations and components can be reused or adapted as part of delivery. This reuse-first approach allows organisations to benefit from proven solutions, reducing delivery effort, shortening timescales and lowering overall cost, while still allowing solutions to be tailored to local operating models and governance requirements.

These examples are indicative rather than exhaustive. OAS maintains a broader catalogue of automations and patterns developed across multiple public sector engagements. Full lists of applicable use cases and reusable components can be provided as part of discovery or procurement discussions, allowing scope to be tailored to organisational priorities and maturity.

2 Delivery Model

2.1 Overview

OAS operates a delivery model designed for public sector environments where service continuity, governance and risk control are critical. The model supports incremental delivery, allowing value to be realised early while maintaining operational stability and oversight.

Delivery is structured to align with real service operation rather than technical phases, ensuring automation and orchestration are introduced in a controlled, practical way. The approach supports both discrete automation initiatives and wider transformation programmes, including those running alongside organisational change or system replacement.

2.2 Delivery Stages

Delivery is structured into defined stages to ensure services are introduced in a controlled and proportionate manner. The stages below reflect a practical approach to progressing from initial understanding through delivery and into live operation, with assurance applied throughout. Where appropriate, early assessment activities may be used to confirm readiness, governance and technical foundations before significant delivery begins, helping to reduce risk and shape an appropriate delivery approach without delaying value.

Stage	Summary
Discovery & Scoping	Understand current services, demand, systems and constraints. Identify where automation and orchestration will deliver value and confirm scope, priorities and delivery approach.
Design & Orchestration	Define how work should flow end to end, including routing, decision points, automation and human involvement. Align with target operating models and governance requirements.
Build & Configuration	Configure orchestration, automation and integrations in controlled stages. Reuse existing components where possible to reduce cost and delivery time.
Testing & Assurance	Validate functionality, security and behaviour in line with public sector assurance expectations. Ensure solutions operate correctly in real service scenarios before release.
Deployment	Introduce capability in a controlled manner to minimise disruption and maintain service continuity. Changes are phased and supported as required.
Operate & Improve	Monitor performance, refine processes and scale capability over time. Support continuous improvement as demand, policy or services change.
Governance & Control	Maintain clear ownership, auditability and change control throughout delivery and operation, ensuring transparency and compliance with public sector standards.

2.3 Technology Approach

2.3.1 Overview

OAS takes a pragmatic, process-led approach to technology, designed for public sector environments where stability, security, auditability and long-term sustainability are critical.

Technology choices are driven by the needs of the service and the characteristics of the process being automated. Capability is introduced conservatively, starting with well-established approaches and extending incrementally where additional functionality delivers clear operational benefit. This ensures organisations can modernise services without unnecessary technical risk or wholesale system replacement.

The technology approach supports a progressive automation journey, allowing organisations to adopt foundational automation, orchestration and agent-led capability in line with organisational readiness and service priorities.

2.3.2 Technology Principles and Architecture

Area	Approach
Process-Led Design	Service processes and operating models define the technology used. Automation and AI are applied where they add value, rather than as a fixed or mandatory stack.
Foundational Automation First	RPA is typically used as the starting point due to its maturity, auditability and suitability for regulated environments. This provides a stable foundation for further capability.
Progressive Capability Expansion	Additional capability such as document capture, rules-based decisioning, conversational interfaces and agentic automation is introduced incrementally where justified by service need.
No Technical Lock-In	Solutions are designed so early automation does not constrain future options. Capability can be extended, adapted or replaced as services evolve.
Layered Architecture	A layered model separates interaction, decisioning and execution, allowing components to evolve independently while remaining orchestrated end-to-end.
Orchestration-Centred Design	Orchestration coordinates systems, automation, digital workers and human teams, providing control, visibility and auditability across services.
AI Governance and Control Layer	Where generative AI or large language models are used, access can be governed through an AI control layer such as SS&C Blue Prism AI Gateway. This provides a controlled interface for invoking AI services, supporting policy enforcement, role-based access, audit logging and protection against data leakage or inappropriate AI use, without introducing a standalone buyer-facing service.

2.4 Core Technology Components

2.4.1 Digital Front Door

The digital front door provides a consistent interaction layer across channels including voice, email, web chat, online forms and assisted digital routes. It enables demand to be captured once and handled consistently, regardless of entry channel.

This layer can be introduced independently or alongside existing channels and extended over time as services mature.

2.4.2 Agentic and Decision Support Capability

Agentic and decision-support capability is used to interpret intent, apply rules and context, and support triage, classification and routing. These capabilities operate within defined controls and governance frameworks, ensuring transparency, auditability and appropriate human oversight.

Agentic capability is applied selectively, building on established automation rather than replacing it.

2.4.3 Automation and Digital Workers

Automation is used to execute defined operational tasks, including high-volume processing, administrative activity and system-to-system data movement.

Blue Prism is used as the primary automation platform due to its strong public sector adoption, security model and auditability. Digital workers are treated as a shared execution capability, governed through orchestration and integrated into end-to-end service flows. OAS has an extensive library of back office automations that have the potential to be repurposed to your needs, reducing the cost and time to deliver and a faster ROI.

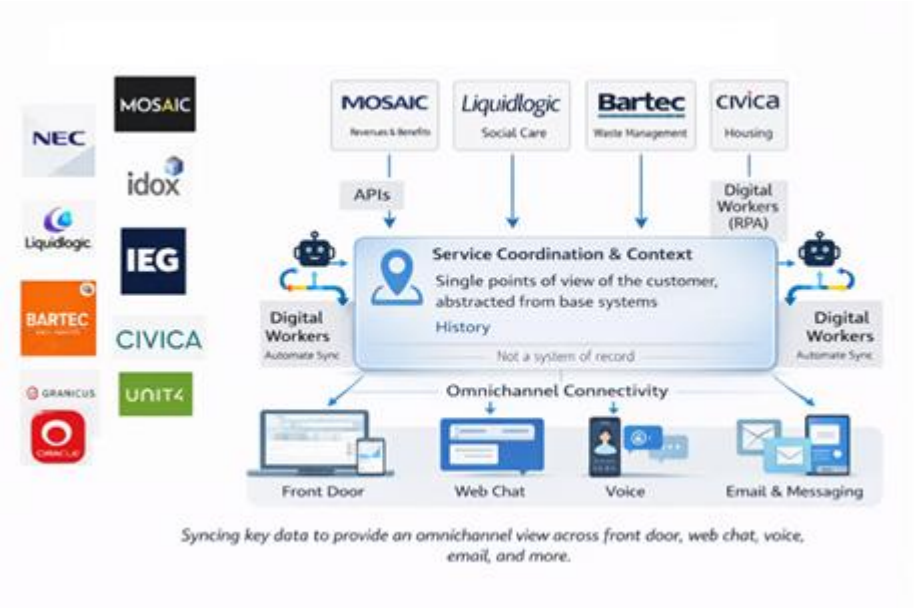
2.4.4 Integration and Data Flow

Where integration across multiple council systems is required, the service can operate using a service coordination layer that sits alongside existing line-of-business applications. This approach is illustrative of how integration may be delivered and does not require customers to implement a specific architecture or integrate all systems.

The service does not replace existing applications or act as a master data store. Each system remains responsible for its own data and statutory decisions. The coordination layer, where used, maintains a lightweight service view of cases or residents using references and status information drawn from source systems. This supports routing, tracking, and coordination of work without copying full records or tightly coupling systems together.

Data exchange mechanisms are selected only where integration is needed. APIs are used where available and proportionate. Where APIs are unavailable, restricted, or uneconomic, digital workers may be used by the service as a governed execution mechanism to synchronise required data safely and consistently. Customers are not required to expose APIs or make changes to existing systems.

All updates are handled asynchronously, enabling services to continue during outages, upgrades, or organisational change. This approach provides a flexible integration pattern that can be applied selectively, supporting joined-up service delivery where needed while avoiding unnecessary complexity, risk, or cost.



Syncing key data to provide an omnichannel view across front door, web chat, voice, email, and more.

2.4.5 Security, Governance and Assurance

Security, governance and assurance are integral to the design and operation of the service. Controls are applied across technology, delivery and operational processes to ensure services are decision-safe, auditable and compliant with public sector requirements.

Governance is supported through defined operating models, clear ownership, controlled change, and documented standards covering automation, integration and AI usage where applicable. Security controls address access management, data protection, monitoring and incident management, ensuring risks are identified and managed proactively.

Where appropriate, structured assessments such as the SS&C Blue Prism Robotic Operating Model (ROM2) may be used to assess governance maturity, operating model readiness and control effectiveness. This includes review of roles, standards, build quality and technical foundations, providing assurance that automation and agentic capabilities are implemented safely and sustainably.

This approach ensures that services are delivered with appropriate oversight, accountability and confidence, while supporting continuous improvement over time.

2.4.6 Scalability and Sustainability

The architecture is designed to scale across services, departments and organisations. Capability can be extended incrementally without re-engineering the underlying solution, supporting long-term sustainability and evolving service needs.

2.4.7 Delivery Assurance

Delivery assurance ensures that services are implemented consistently, safely and in line with agreed standards. Assurance activities are embedded throughout delivery to validate design, quality, technical readiness and operational suitability before services are progressed or scaled.

Assurance covers areas such as adherence to development standards, robustness of automation and integrations, security controls, and operational readiness. Reviews are used to identify risks early, confirm suitability for live operation and ensure services can be supported and maintained effectively.

Where appropriate, structured assurance approaches such as build quality and technical infrastructure assessments may be applied to provide additional confidence in solution quality and delivery readiness. This ensures that automation and agentic capabilities are deployed in a controlled manner, reducing delivery risk while supporting sustainable, long-term service operation.

2.5 Section 4 Service Levels

Class	Target Response Time	Target Resolution Time
Priority 1	Response within one hour.	Continuous effort, within Service Hours, to resolve the Fault within 12 Service Hours.
Priority 2	Response within three hours.	Fault resolved by the end of the following three Business Days.
Priority 3	Response within one Business Day.	Bug fix scheduled for the next available release.
Priority 4	Outsource Automation Solutions shall consider such issues or requests in the light of other Customer requirements and will advise what action will be taken to address the issue.	

2.6 Section 5 Training

Training and enablement are provided as part of the service to support sustainable, in-house capability and reduce long-term dependency on suppliers. The approach is **progressive and role-appropriate**, allowing customers to build skills at a pace that matches their automation maturity and delivery ambition.

Enablement typically begins with **foundational training**, covering delivery methodology, development standards, peer review techniques, and practical use of automation tooling. This establishes a consistent, governed approach to automation development and ensures work is delivered to repeatable, supportable standards.

For organisations seeking to accelerate value, **HeadStart enablement** combines structured training with hands-on delivery. Under this model, delegates are mentored through the design and build of live automations drawn from the customer's own pipeline. This enables teams to move beyond theory, producing automations that are ready for user acceptance testing or live operation as part of the training engagement.

Training can be delivered **on-site or remotely**, and may be complemented by ongoing mentoring, peer review, and design oversight to support early deliveries. Specialist training is also available for platform operations, including scheduling, monitoring, exception handling, and operational governance, ensuring customers can safely run and manage automations in production.

This approach ensures knowledge transfer is embedded, capability is retained, and customers are able to operate, extend, and govern their automation capability independently over time.

	Basic	Standard	HeadStart Professional	HeadStart Remote
	Automate web-based applications.	Automate web-based, thick client & Citrix applications.	Each delegate builds a real automation and puts it live	The delegate builds a real automation and puts it live
Learn the highly successful OAS Delivery Methodology	✓	✓	✓	✓
Advanced use of Blue Prism	✓	✓	✓	✓
How to Automate using a Modern Browser	✓	✓	✓	✓
Coaching in Effective Peer Review Techniques	✓	✓	✓	✓
Use of OAS Productivity Tools	✓	✓	✓	✓
How to Automate using a Windows Application		✓	✓	✓
How to Automate using Surface Automation		✓	✓	✓
8 hours Mentoring & Support for creation of each Process Definition Document (PDD)			✓	✓
Experts oversee Design of Process			✓	✓
Other Technologies if required by the Automation			✓	✓
20 hours Mentoring & Support post-training per Delegate.			✓	✓

3 Contact Outsource Automation Solutions

If you are interested in exploiting the power of automation, without having to make any of the usual compromises, contact us at

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