

G-Cloud 15

monday.com

Lot 3

Service Definition Document



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1. Our Offerings

Monday.com Strategic Software Advisory

Invoka offers thought-leadership and strategic software advisory services for organisations looking to transform their ways of working through the use of monday.com collaborative work management software.

Invoka advises on:

- Monday.com Plans
- Licensing models
- Monday.com Work Management platform
- Monday.com Product Suite:
- Monday Sales CRM
- Monday Dev
- Monday Marketer
- Enterprise governance and administration
- Marketplace apps and integrations

Invoka provides information and guidance to help you minimise cost and maximise the value you get from the platform.

Tailored Implementations

Invoka creates monday.com solutions of varying complexity based on customer requirements. We follow an in-depth scoping process to identify use cases before documenting agreed deliverables in a Statement of Work.

Our engagements follow a structured methodology ensuring a collaborative approach to solution design and implementation. Our objective is to hand over a tailored monday.com solution with the knowledge and experience for long-term operation and governance.

Regional Hosting and Migration Support

Invoka provides advisory support for organisations requiring regional hosting alignment or migration planning, supporting monday.com Enterprise deployments and global operating models.

Where buyers require specific data residency or region-based configurations, Invoka supports planning and implementation approaches aligned to monday.com's available options.

Investment Optimisation

Invoka advises organisations on optimising Return-on-Investment (ROI). By analysing existing monday.com usage, licensing, and workflows, we provide investment “Health Checks” to ensure customers are benefiting from the latest features available within their subscription tier.

System Administration Support

Invoka offers ongoing support to maintain and govern a customer organisation’s monday.com environment, including:

- User management
 - Workspace and board administration
 - Permissions and access control
 - Single Sign-On (SSO) support
 - Governance and template management
 - Administrator training
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Customer Success

Invoka provides Customer Success services to ensure organisations have access to the latest monday.com best practices and are using the platform efficiently.

Customer Success provides:

- Adoption and satisfaction reviews
 - Guidance to resolve critical issues
 - Support in scaling monday.com across teams
 - Licensing optimisation and add-on procurement
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Technical Account Management

Invoka provides access to Technical Account Management services to support buyers embedding monday.com within delivery teams.

Fast response times, consistent communication, and efficient resolution are core to our support approach.

Services include:

- Proactive solution review and advisory
- Support engaging new features within existing workflows
- Pragmatic navigation of monday.com support channels
- Training support for specific teams and use cases

Training

Invoka provides tailored monday.com training services for different user groups and maturity levels.

Training packages can be shaped by:

- Organisation size
- User maturity
- Required content topics
- Automation and integration use cases
- Enterprise governance requirements

Training types include:

- General user training
- Monday.com fundamentals
- Intermediate workflow training
- Advanced administration training
- Train-the-trainer packages

Training content can be licensed for reuse across the organisation.

2.Our Approach

Invoka offers 360-degree life-cycle management of monday.com and similar platforms. We use a collaborative approach to understand buyer challenges and recommend optimal solutions.

Focusing on customer experience, we manage end-to-end procurement, adoption, training, and platform optimisation. Starting from the desired business outcome, we advise on the best approach to transform processes and ways of working using monday.com.

3.Pricing

Please refer to the pricing document for this service.

Any additional services that may be required to deploy or enhance this service can be procured either on a T&M or Fixed Fee basis using Invoka's SFIA rate card.

4. Social Value

Climate Change

Invoka Consulting's Environmental Policy demonstrates its commitment to environmental stewardship by integrating sustainable practices into all business operations. The policy covers every aspect of the company's operations, from office and remote environments to IT and travel policies, aiming to minimise environmental impact and promote sustainability.

Our core principles focus on sustainable operations that reduce waste and energy use, resource efficiency, environmentally friendly procurement, and effective waste management. Energy management is targeted through the use of smart systems and energy-efficient appliances, with a gradual shift towards renewable energy sources. Employee engagement is also crucial, with initiatives to educate staff on sustainability and encourage their participation in local environmental activities. Additionally, the company strives for carbon neutrality through regular carbon footprint assessments and investments in carbon offset and renewable energy projects.

Key strategies include compliance with environmental regulations, ongoing environmental performance reporting, and continuous improvement through new technologies and regular audits. Collaboration extends beyond the organisation, involving community engagements and partnerships with industry peers to enhance environmental awareness and initiatives across the tech sector.

The policy outlines specific environmental targets such as a 20% reduction in energy consumption within five years, a 30% reduction in carbon emissions by 2028, and a commitment to sustainable procurement practices by 2027. These targets are supported by strategic initiatives, including upgrades to office facilities, employee-driven energy conservation, and environmentally stringent procurement policies.

In conclusion, Invoka Consulting aims to set a high standard within the software consultancy sector for environmental responsibility, not only adhering to existing laws but also pioneering advancements in corporate sustainability. This policy will be reviewed annually to adapt to new scientific findings, regulatory changes, and the company's growth, ensuring it remains at the forefront of environmental excellence.

Economic inequality

At Invoka Consulting, we recognise that economic inequality is one of the most pressing challenges facing society today. As a leading software consultancy, we are committed to implementing strategic initiatives that promote economic inclusivity and

contribute to reducing disparities within the communities we serve and our industry at large.

Our approach to tackling economic inequality is multi-faceted, focusing primarily on education, employment, and community engagement. We believe that education is a fundamental enabler of equality; hence, we actively partner with educational institutions to provide scholarships and internships to underrepresented groups. These programs are designed to equip students from economically disadvantaged backgrounds with the necessary skills and opportunities to thrive in the tech industry. Employment practices at Invoka Consulting are rigorously inclusive. We strive to create a diverse workplace culture that not only hires but also supports, retains, and promotes individuals from varied socio-economic backgrounds. By implementing fair hiring practices and offering competitive wages and benefits, we ensure that our employees receive equal opportunities for growth and advancement.

Moreover, Invoka Consulting is involved in various community engagement initiatives that support economic development. We collaborate with local businesses and nonprofits to launch programs that drive local economies and support small enterprises. These initiatives not only stimulate economic activity but also empower local communities by creating jobs and providing essential services.

Through these concerted efforts, Invoka Consulting aims not only to mitigate the effects of economic inequality but also to set a precedent in the corporate world for social responsibility. We are dedicated to continual improvement in our strategies and to collaborating with other organisations to amplify our impact, fostering a more equitable economic landscape.

Equal Opportunity

At Invoka Consulting, we are dedicated to fostering an environment of equal opportunity for all. We believe that our strength lies in our diversity, and we are committed to levelling the playing field to ensure that everyone, regardless of their background, has the opportunity to succeed.

Our commitment to equal opportunity is reflected in our comprehensive policies and practices designed to eliminate bias and promote equity throughout our organisational processes. From recruitment and hiring to promotions and professional development, our strategies are meticulously crafted to ensure fairness and transparency.

Recruitment at Invoka Consulting is conducted with a deliberate focus on diversity. We employ targeted outreach and partnerships with diverse professional organisations to attract candidates from underrepresented groups, including women, people of colour, and individuals from economically disadvantaged backgrounds. Our hiring processes are rigorously structured to avoid unconscious bias.

Professional development and advancement opportunities at Invoka are equally accessible to all employees. We provide a range of training and mentorship programs that support career growth and skill development, helping every employee to achieve their full potential. Additionally, we regularly review our employment practices to ensure they remain fair and do not inadvertently disadvantage any group.

Beyond internal policies, Invoka Consulting actively participates in initiatives that promote equal opportunities in the wider community.

Through these actions, Invoka Consulting not only upholds its values of diversity and inclusion but also contributes to a more equitable society. We continue to challenge ourselves and our industry to raise standards and expand opportunities, ensuring that every individual has the chance to excel.

Wellbeing

At Invoka Consulting, we believe that the well-being of our employees is fundamental to our success. Recognising the integral role that mental, physical, and emotional health plays in productivity and satisfaction, we are committed to fostering a workplace environment that supports and promotes the well-being of every member of our team.

Our comprehensive well-being program is designed to cater to the diverse needs of our employees, offering resources and initiatives that address various aspects of health and wellness. We understand that well-being extends beyond physical health; therefore, our programs encompass mental health support, work-life balance, and community-building activities.

Mental Health Support: We provide our employees with access to professional mental health resources, including counselling services and stress management workshops. Our mental health days off and flexible scheduling options allow employees to take time for self-care without the pressure of traditional workplace constraints.

Physical Health Initiatives: Invoka Consulting promotes physical health through regular health screenings and wellness challenges that encourage active lifestyles. Our office environments are designed with ergonomic workspaces to prevent physical strain and enhance comfort.

Work-Life Balance: We strive to maintain a culture that respects personal time and family life. Flexible work arrangements, such as remote work options and adjustable working hours, enable our employees to balance their professional and personal responsibilities effectively.

Community and Social Well-being: We encourage a sense of community and belonging through team-building retreats, company events, and volunteer

opportunities that allow employees to connect with one another and engage with the broader community.

Invoka Consulting is dedicated to continuously improving our well-being initiatives based on employee feedback and the latest research in occupational health. By investing in the well-being of our staff, we not only enhance individual employee experiences but also cultivate a healthier, more productive, and more inclusive workplace.

