

Org



G-Cloud 15 – Lot 2b – Software as a Service (SaaS)

RPA, AI and Automation Platforms

Service Definition Document

Contact Details

For more information or questions about this service, please contact us at: bids@thisisorg.com

Notices

In the absence of any specific provision, this document has consultative status only. It does not constitute a contract between Org and any other party. Furthermore, Org does not accept liability for the contents of the document, although it has used reasonable endeavours to ensure accuracy and correct understanding.

Table of Contents

Org – Company Overview	3
Our Vision	3
Our Value Proposition: Transform Every Customer Interaction	4
Org Groups Core Services	5
The Transformational Customer Journey: The 4 Cs for Success	5
Social Value	7
Service Overview	11
Our Delivery Approach	11
Overview of the G-Cloud Service	12
Key Service Capabilities:	13
Cloud Characteristics and Benefits:	13
Support and Outcomes	13
Associated Services	14
Data Protection	15
Data Protection and GDPR Compliance	15
Data Back-Up and Restoration	16
Testing and Review	17
Business continuity statement / plan	17
Privacy by Design	18
Using the service	20
Ordering process	20
Invoicing	20
Availability of Trial Service	20
On-Boarding, Off-Boarding, Service Migration, Scope.	21
Support Across All Phases of Delivery	23
Training	23
Implementation Plan	25
Service Management Overview	26
Service Constraints	27
Service Levels	28
Provision of the service	32
Customer Responsibilities	32
Technical Requirements and Client-Side Requirements	32
Outcomes/Deliverables	33
Development life cycle of the solution	34
After-sales Account Management	35
Termination Process	36
Evidencing Our Experience	38

Org – Company Overview

At Org, we advise, resource, and deliver transformational change for our clients. Org is a more human kind of professional services company created to harness the power of people who get things done. We humanise the experience of transformational change for organisations and help you bring this to life with your people and customers.

Org is an Irish owned, globally operational, professional services business that was originally established in 1988. Since then, it has grown from a recruitment solution business into a business with three decades of expertise and experience across advisory solutions, resourcing and managed services. With over 3 000 employees and 2,500 associates operating from 20 locations in 10 countries across three brands (Org Advisory, Morgan McKinley and Abtran), Org provides end-to-end, seamless support to a global customer base. Their specialist technology division, Org Technology Services, specialises in the delivery of transformation change enabled by technology across marketing, sales, customer service, finance, HR, engineering, data, automation and AI. The capability within our group allows us to provide solutions to all needs within business transformation and growth.

Here at Org, we help make transformational change happen; our people have sat in your chair and walked in your shoes. We focus on understanding and addressing your “WHY” so we can develop customised solutions that deliver successful and measured outcomes. By harnessing the power of people and technology, we accelerate your time to value. Our aim is to provide a refreshing way of thinking and solutions development for modern day problems. We will work smarter and in a more practical and humanistic way to ensure that you see results in real time.



Org Group Overview

Our Vision

Our vision is to be the leading provider of independent advisory and technology services that deliver the solution you need, not the solution we have or ‘think’ you need; to offer expertise, time and value every step of the way, whilst delivering sustainable business change. At Org we help make transformational change happen.

WHY.

We are unashamedly different; we want to disrupt traditional thinking and make transformation More Human.

HOW.

By asking our clients to explore 'WHY' they are transforming, to ensure they can achieve successful outcomes.

WHAT.

Guide clients through the transformation journey, as our people that have walked in their footsteps.

Our Value Proposition: Transform Every Customer Interaction

Many public sector organisations know they need to modernise, but often aren't sure where to begin, how to guide their workforce through change, or adopt AI safely and effectively. Familiar routines may feel comfortable, but they can slow progress, raise costs, and restrict capacity. Our service helps organisations recognise this tendency and gives them the skills, confidence, and ability to rethink how work gets done.

Reimagine CX with cloud-native flexibility and AI-driven intelligence.

Org recognises that the public sector also values continuity, which can make adopting innovative technologies challenging. Org will support Public Sector organisations to embrace change and new technology with targeted support to help teams:

- Understand the reasons for change,
- Recognise the practical benefits of new technology,
- Focus on improved outcomes for citizens and reduced admin workloads,
- Acquire digital skills and boost confidence,
- Adopt technology safely with clear oversight and governance.

This focus ensures that transformation is guided by people and organisational needs, not just technology; with Org's comprehensive support throughout the transition.

Org A&T drives value for our clients and delivers tangible business outcomes, delivering value at scale, optimising costs and boosting capability, whilst reducing TCO, unlocking automation with AI and empowering organisations and citizens through intelligent, adaptive experiences.

Reimagine Customer Engagement: The Benefits

Move beyond telephony. Amazon Connect is a cloud-native, AI-native platform that unifies voice, chat, and digital channels...enabling automation, self-service, and agent assist at scale through agentic AI.

Turn Conversations into Intelligence. Uncover patterns, sentiment, compliance risks, and opportunities, from churn prediction and contact drivers to cross-sell and coaching insights.

Deliver Measurable Business Outcomes. Reduce total cost of ownership, strengthen CX visibility, drive operational gains and garner richer insight across every interaction. Double-digit improvements in compliance accuracy, coaching effectiveness, and customer satisfaction.

We support public organisations to:

- Prepare proactively for change rather than just respond to it.
- Find out where AI and automation truly add value.

- Get staff involved early so they feel engaged and not threatened.
- Develop reinvention skills throughout teams.
- Achieve real improvements in efficiency, quality, resilience, and citizen satisfaction.

Ultimately, we make technology adoption practical, responsible, and focused on what matters most: delivering better services for citizens and creating better workplaces for staff.

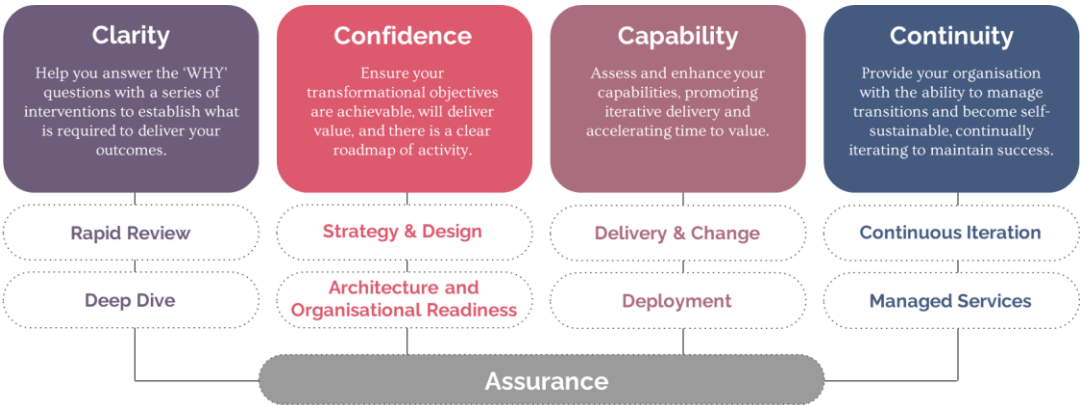
Org Groups Core Services

We put customer outcomes at the heart of Org and help develop solutions covering the entire spectrum of Professional Services, from Executive Strategy and Execution to full IT development and Support Services. Our Advisory & Technology Services include:

Organisational Effectiveness Structure, resilience and ability to service customers in a sustainable manner Target Operating Model Organisational Redesign UX Process Design Customer Journey	Transformation Capability Seamless solutions to manage transformational change across business and technology Portfolio Management Agile Adoption Change Management Transformation Office	Finance Optimisation Modernised and streamlined finance functions to provide best in class services Cost Performance Risk & Audit Data Reporting Centres of Excellence
Business Systems Systems designed to enhance business performance and user experience CRM Business Mapping ERP HRIS	Digital Ecosystems Digital transformation solutions that are aligned to the strategic objectives of organisation Cybersecurity Cloud Solutions Data & Analytics RPA & AI	Omnichannel Experience The Org Omnichannel ecosystem is a cloud-based Contact-Centre-As-a-Service solution tailored to the contact centre needs of an organisation Contact Centre Secure Mail Room Integrated Case Management Workforce Management

The Transformational Customer Journey: The 4 Cs for Success

We believe that careful consideration and planning of the steps in your journey to deliver your strategic objectives is essential to success. Org’s 4 C’s form a huge part of this success. At any point on the journey, there can be a complex set of variables, data and insights that require understanding and intervention.



Social Value

Org's approach to reducing the environmental impact of the proposed services/managed service is fully aligned with international best practice and recognised environmental standards.

We apply social value and sustainability principles across all areas of design, delivery and operation to ensure that every element of the proposed solution supports responsible procurement, energy efficiency and carbon reduction.

We have a dedicated Sustainability Manager and a comprehensive Sustainability Strategy aligned with the United Nations Sustainable Development Goals (UN SDGs), the EU Climate Action framework, and a Net Zero emissions policy. This strategy is embedded throughout our organisation, reflected in the delivery of all client programmes and provides reporting on the progress towards the Sustainable Development Goals.

Org's environmental and social responsibility is built on three core pillars, which align with G-Cloud's Social Values:

Org's Pillars of environmental and social responsibility		G-Cloud Social Value alignment
1	Happy Society	Breakdown Barriers to Opportunity Build an NHS for the Future
2	Healthy Planet	Make Britain a Clean Energy Superpower
3	Thriving Economy	Kickstart Economic Growth

These pillars guide how we deliver technology and services that create measurable environmental, social, and economic value.

Happy Society: Training is provided for our employees throughout their careers to continue their development. This consists primarily of training that is identified to support the individual's career development path, training to address any performance issues and training in new technologies and processes that are implemented in support of the service.

Within the Org Group, to support the community we have introduced a community investment policy that formalises our community partnerships and defines the conditions under which we provide support. Our employees vote annually on three charities they wish to support. We report on our community engagement metrics to capture community contribution data, this includes money donated, volunteering days and number of beneficiaries impacted.

Healthy Planet: We are an extremely low-impact organisation in terms of our carbon footprint. What we do is people based, we advise and deliver transformational types of service with extremely low impact. Travel of our staff is probably our highest impact on the environment. We work in a hybrid environment and actively encourage working practices that reduce energy usage and consumption of resources.

Within Org Group, we continue to reduce operational carbon emissions. In line with the public sector energy efficiency directives, we have aligned our target of achieving an absolute energy consumption reduction each year of 1.9% and committing to reach Net Zero emissions by 2030.

To reduce embodied and emitted emissions, our environmental initiatives focus on identifying opportunities to:

- Reduce energy consumption and emissions from the sites where our services are provided, including through the increased provision of renewables.
- Reduce emissions for transportation, for example by increasing the use of electric vehicles, public transportation, and remote working tools.
- Reduce paper and transition towards a paper-free service, encouraging customers and service users to adopt digital alternatives.
- Reduce embodied emissions by working with direct suppliers within the service to reduce the carbon footprint of products and services.

We are certified to ISO 14001 Environmental Management System and have successfully maintained certification through external surveillance and recertification audits. These standards provide the structure for continuous improvement, pollution prevention and compliance with all relevant environmental legislation. We are required to report on our targets and maintain an ongoing risk register of actions.

Thriving Economy: Org is committed to providing equal opportunities at all stages of employment and to avoiding unlawful discrimination in employment and in the conduct of its business. We aim to create a working environment which is free of discrimination, harassment and bullying. That everyone is treated with dignity and respect is an important aspect of ensuring equal opportunities in employment. We do not discriminate against staff on the basis of age, disability, gender reassignment, marital or civil partner status, pregnancy or maternity, race, colour, nationality, ethnic or national origin, religion or belief, sex or sexual orientation. We have an Equal Opportunities Policy available upon request.

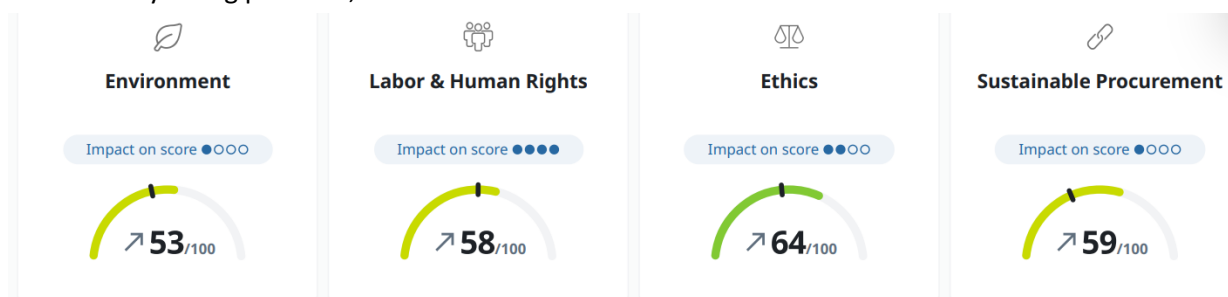
We have implemented a Green Public Procurement Strategy which ensures that products and services selected for our operations and client projects have the lowest possible environmental impact. Environmental and lifecycle considerations are embedded into procurement decisions, favouring suppliers that:

- Demonstrate sustainable and ethical business practices.
- Provide environmentally responsible materials and products.
- Offer low-carbon alternatives to disposable or high-impact goods.

Our Supplier Code of Conduct requires all partners to meet strict sustainability criteria, including accountability for emissions, responsible waste management, and the adoption of recyclable or biodegradable products wherever possible.

Measuring our Success

To ensure that we are achieving against our social metrics, we have engaged with the globally recognised sustainability rating platform, EcoVardis.



EcoVardis Scores for 2025

We have made significant progress since our initial assessment in 2024 and will maintain the momentum into 2026. We have implemented a number of activities that align with our sustainability pillars and social values.

Happy Society – Break-down Barriers to Opportunity

We actively foster an inclusive, diverse workforce culture, ensuring every employee feels valued and given the support they need. From global awareness training to employee engagement groups, and surveys to assess our performance, we're continuously reviewing ways to improve each year.

- Provision of skills development training and actions to promote internal mobility through regular assessment of individual performance. Individual development and career plans for all employees.
- Actions to ensure equal pay for equal work and grievance mechanism to report concerns around working conditions.
- Actions to promote the inclusion of employees with disabilities.
- Training of employees and grievance mechanism to report child labour, forced labour and/or human trafficking issues.
- Family Friendly programs (FFPs) implemented (e.g. parental or care leaves, childcare services or allowances).
- Flexible organisation of work (eg. remote work, flexi-time).
- Actions to address stress and psychological wellbeing in the workplace.

With more than 800 of our people all over the world taking the time and effort to make a difference in the lives of others, we are proud to reveal that we have reached our target of £1 000 000, supporting over 200 charities in our global communities and volunteering for more than 8,000 hours with local causes.

At the end of 2025 we launched a group wide ESG initiative called Org Group Impact which is our new unified group CSR initiative to amplify our positive influence across communities worldwide. The key areas covered will be fundraising, volunteering, sustainability, partnerships and supporting your community. This will be tracked and reported on regularly.

Environment - Make Britain a Clean Energy Superpower

In 2026, our carbon reduction plan and carbon footprint measurement will be verified by a third party, which will provide a transparent view and action plan in terms of our emissions. Some of our initiatives are detailed below:

- Efficient utilisation of office space to allow HVAC systems, PC's, and lighting to be turned off when not in use and installing of LED lighting across all sites
 - We have seen a reduction of energy consumption of lighting systems, saving approximately 54 000kWh per year reducing energy consumption by 22%.
 - We are working towards reducing our waste carbon footprint to below 2 tonnes per person of CO² from all sources by 2050. For two of our sites, we have already achieved 1.79 tonnes of CO² and 1.80 tonnes of CO².
 - Across our sites 49% of our waste was recycled.
 - We have reduced our energy consumption by 1.7% overall and we will continue to reduce our energy consumption by installing solar panels at our office locations. This will save an estimated 121 metric tons of CO² equivalent annually.

- We are also working with our electricity provider on continuing to increase renewable energy sources. We are currently at 71% renewable energy and we are reviewing options to increase this to 100% verified green electricity by 2026.
- Training of employees on energy conservation/climate actions, waste reduction.
 - Recycling rates increased from 40% to 51%. All our sites have clearly labelled segregation bins in strategic areas
 - We share and implement great ideas to create a smarter, greener environment. This includes Tidy Towns, STEM programmes, and Beach clean-ups.
 - Promoting sustainable travel through our Cycle to Work Scheme and subsidised cost public travel passes.

Thriving Economy – Kickstart Economic Growth

The scale and urgency of climate change and rising inequality require collaboration at every level. Our suppliers are key to our success and we understand that by working closely with them to encourage continual improvement, will have an impact beyond ourselves alone.

To achieve our aims, we have a documented Supplier Code of Conduct, that enables continuous improvement and reflects our sustainability expectations relating to ethics, decent working conditions and plans to measure and reduce environmental impact.

Where possible we commit to environmentally sound procurement practices and ensure that our supply partners adhere to ethical business practices. Part of our procurement selection process is an evaluation as to whether the products and services have a reduced environmental impact throughout their life cycle, compared to their competition, and to choose those with the lowest footprint where possible.

For example, all onsite consumables are either biodegradable or recyclable and we have recently revised our strategy regarding cleaning products to ensure that only eco-friendly consumables are used across our sites.

These measures not only help lower our environmental impact but also contribute to cost savings for the company and align with Green Public Procurement (GPP) principles

Along with our suppliers, we learn and work together to achieve our sustainability targets.

Service Overview

Org delivers a Software-as-a-Service and managed support solution that utilises industry-leading, off-the-shelf automation and AI platforms, including UiPath, Druid AI and Otera. As a Platinum reseller and delivery partner for these technologies, Org assists public sector organisations in the adoption, scaling, and governance of automation and AI solutions with a focus on safety and effectiveness.

While organisations may opt for software licences alone, our service is designed to provide comprehensive support—combining advanced technology, implementation expertise, and a commitment to continuous improvement to achieve measurable results.

Our Delivery Approach

Our approach to planning and managing the delivery of the service will be multi-faceted. A strong and experienced team will deliver a de-risked implementation, framed by effective governance and strong communication. The approach is underpinned by our overarching determination to make the customer journey as smooth as possible. We work with our clients from the outset to ensure that the operation is set up for success by making sure that client expectations are clearly understood. We meet with all key stakeholder(s), collaborating to build a delivery plan that works for both parties. Org will be responsible for developing and proactively driving this plan through to completion.

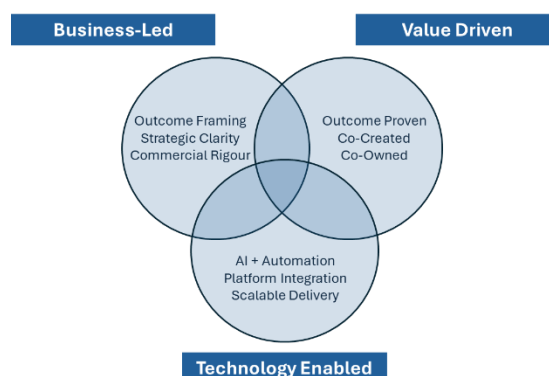
Synergy: Clients unlock more value, faster, through integrated business technology delivery.

Business-led: We don't chase tech trends, we chase results. Everything we do is framed around outcomes clients care about: scalability, resilience, experience and cost control.

Value-focused: We front-load the business case. If it doesn't pay off fast, it doesn't fly.

Technology-enabled: We operationalise AI, platforms, and automation to deliver speed, scale, and self-improving systems.

Outcome-owned: We don't hand over playbooks, we stay on the pitch to share success and shoulder risk.



Delivery Execution

Our solution for the implementation of our managed services is based on a Lean Agile project management methodology. Our methodology focuses on the practicalities of operational implementation within a structured framework. All plans will be clear, transparent and proactive.

This approach has been chosen to ensure that we can flex and scale for the service, whilst ensuring that the required quality standards are achieved from day one. Our methodology has been refined and shown to be successful through many notable and complex implementation projects within the Government public sector.



One team, no seams: Cross-functional pods blending strategy, design, development and delivery from day one.

Rapid rhythm: Agile governance, fortnightly reviews, no dead zones, no drift.

Two-to-six-week sprints: Prove value fast - then scale hard.

Co-created blueprints: Clients aren't handed plans, they build them with us.

Outcome-anchored KPIs: No proxy metrics - only business results count.

Org have extensive experience applying best practices to accelerate the design, delivery and integration of digital eco-systems to transform customer experiences.

Overview of the G-Cloud Service

This service offers public sector organisations access to established, off-the-shelf automation and AI platforms, complemented by implementation, support, and governance services to facilitate safe and efficient digital transformation at scale.

Technology Stack

The service provides access to:

- UiPath for enterprise-level automation, orchestration, governance, and AI driven process management.
- Otera for AI-powered advanced document and workflow automation, optimised for complex, high-volume processes.
- Druid AI for conversational AI, digital assistant deployment and digital front-door services serving citizens, patients, students and staff.

Deployments utilise standard product configurations and established best practices tailored for public sector requirements. All platforms are delivered as Software-as-a-Service, hosted on Microsoft Azure within UK or EU data centres. This arrangement adheres to public sector requirements for security, data residency, and compliance, including GDPR, ensuring high availability, scalability, resilience, and seamless integration with existing Microsoft-based environments.

Support and Enablement

Org offers structured onboarding, implementation guidance, and ongoing managed services, which include:

- Process onboarding and configuration.
- Human-in-the-loop design and exception management.
- Monitoring, support, and optimisation.
- Knowledge transfer and training to develop internal capabilities.

Additionally, the Idea2Innovate framework supports organisations in identifying, prioritising, and justifying automation and AI initiatives, ensuring alignment with actual service challenges and the rapid delivery of value.

Key Service Capabilities:

- **Automation and AI Agents:** Facilitate the deployment and management of AI-enabled automations for high-volume, rules-based, and decision-driven processes across domains such as finance, HR, customer service, and healthcare administration.
- **Conversational AI / Digital Front Door:** Provide secure, round-the-clock digital interaction channels for citizens, patients, students, and staff, contributing to reduced contact centre workloads.
- **Document and Case Processing:** Automate the classification, extraction, and validation of structured and unstructured documents to enhance speed, accuracy, and regulatory compliance.
- **Human-in-the-Loop:** Empower operational teams with exception handling and review workflows, maintaining transparency and oversight where human intervention is necessary.
- **Monitoring and Governance:** Deliver built-in audit trails, logging, role-based access controls, and operational dashboards tailored for public sector assurance and governance requirements.

Cloud Characteristics and Benefits:

- **Azure-hosted SaaS:** Delivers secure, scalable, and resilient services without reliance on on-premise infrastructure.
- **Rapid Deployment:** Solutions can be configured and implemented efficiently using standard platform features.
- **Interoperability:** Designed for integration with established public sector systems (e.g., case management, ERP, EPR/EHR, CRM) via standard interfaces.
- **Security and Compliance:** Incorporates robust security measures, identity management, and compliance certifications aligned with public sector standards.
- **Scalability:** Supports incremental adoption and scaling across departments or organisations as operational needs evolve.

Support and Outcomes

This service enables public sector organisations to:

- Expand automation programmes beyond basic RPA.
- Integrate AI agents safely into operational workflows.
- Enhance citizen and staff engagement through conversational AI.
- Reduce manual workloads, processing delays, and backlogs.
- Uphold robust governance, security, and audit standards.

The service includes assistance with implementation, onboarding, training, and optional managed support to ensure controlled and sustainable adoption of automation and AI. The innovation framework, Idea2Innovate, is available to help identify, prioritise, and evaluate automation and AI opportunities through well-defined business cases and delivery plans.

Public Sector Context

Suitable for central government, local authorities, NHS bodies, and arm's-length organisations seeking to advance beyond foundational automation into AI-enabled services, while retaining the reliability of recognised off-the-shelf platforms hosted on Microsoft Azure and acquired through G-Cloud.

Associated Services

Included services comprise APIs, supplementary add-on services, maintenance, professional services, and storage options. For information regarding pricing, please refer to the rate card/pricing documentation.

In summary, Org offers more than software licences; it provides a comprehensive, off-the-shelf service that supports public sector entities in adopting automation and AI within a controlled, scalable, and outcomes-driven framework.

Data Protection

Information Assurance

Org delivers services in accordance with UK public sector data protection and information assurance requirements. We maintain strong governance frameworks, comprehensive security controls, and partner assurance measures to safeguard information throughout the service lifecycle.

Security Standards and Certifications

Org operates an Information Security Management System accredited with the principles of ISO/IEC 27001.

Our cloud technology partners—including UiPath and Druid AI—are hosted on Microsoft Azure, which holds the following certifications:

- ISO/IEC 27001
- ISO/IEC 27017 (cloud security)
- ISO/IEC 27018 (personal data protection in the cloud)
- SOC 1 / SOC 2 Type II
- UK GDPR and EU GDPR compliance.

Org are also accredited with Cyber Essentials and Cyber Essentials Plus.

Data Protection and GDPR Compliance

Org complies with the UK GDPR, Data Protection Act 2018, and applicable public sector guidelines. We adhere to data minimisation principles, ensuring that personal and sensitive data is only processed when necessary for service delivery. Data Processing Agreements (DPAs) are established as required, clearly defining the roles and responsibilities of controllers and processors.

Cloud Hosting and Data Residency

Services are provided via commercial cloud platforms hosted within Microsoft Azure's EU/UK regions. This guarantees data residency within the UK or EEA unless otherwise contractually agreed. No public sector customer data is transferred outside of approved jurisdictions without explicit authorisation.

Access Control and Security

Role-based access control (RBAC) is enforced across all environments. Multi-factor authentication (MFA) is mandatory for administrative access. Access privileges are restricted to authorised personnel based on the principle of least privilege. Comprehensive logging and audit trails are maintained for all access and activities.

Operational Security and Processes

We implement secure onboarding and offboarding protocols for employees and contractors, conduct regular security reviews and partner assurance verifications, and operate incident management and escalation procedures aligned with public sector standards. Our change management controls ensure system stability and maintain traceability.

Policies and Governance

Org maintains and enforces the following policies and standards:

- Information Security Policy
- Data Protection and Privacy Policy
- Access Control Policy

Data Back-Up and Restoration

Plans, Processes, and Systems for Data Protection

We have established comprehensive plans, processes, and systems to safeguard against data loss for this service. Backup frequency, user controls, and regular review of procedures are all part of our commitment to robust data protection. Specific client requirements can be addressed through pre-order consultations and documented in an Order Form, agreed by both parties.

Data Backup and Restoration

The service's data backup and restoration capabilities are provided via Org's technology partners (UiPath, Druid AI, and Otera), utilising reliable cloud platform foundations. All platforms deploy mature, enterprise-grade backup and disaster recovery protocols within their standard Software-as-a-Service suite.

Platform-Level Backups

Hosting is performed on Microsoft Azure, making full use of Azure's resilience, redundancy, and integrated backup facilities. Data Protection Measures Include:

- Automated, scheduled backups.
- Geo-redundant storage housed in UK/EU approved regions.
- High availability architecture with failover support.

Backup Frequency

Backups are executed automatically according to the platform providers' standard operating procedures, including:

- Daily incremental backups
- Regular full backups.

Retention periods and recovery objectives are set by each provider and are available to customers upon request.

Restoration and Recovery

In cases of system failure, data corruption, or service interruption, platform providers facilitate data restoration. Vendors routinely test and maintain recovery protocols as part of their business continuity and operational resilience programmes. Org oversees customer liaison, ensuring clear escalation and communication with vendors if recovery is required.

Customer Control and Configuration

As an off-the-shelf cloud solution, direct management of raw backups by customers is not supported. However, customers may configure, where enabled by the platform:

- Data retention parameters
- Environment segregation (e.g., production vs non-production)
- Export of logs or reports for local archiving

Any specific requirements can be arranged before order placement and formally recorded in the Order Form.

Testing and Review

Backup and restoration activities are continually reviewed and tested by platform providers under ISO-compliant security and resilience standards. Org regularly examines vendor assurance documentation to uphold compliance with public sector criteria.

Client-Specific Requirements

Should public sector clients require additional backup, retention, or recovery measures, these needs can be discussed during preliminary contract negotiations and confirmed prior to service initiation. All custom arrangements are transparently outlined in the Order Form.

This framework consistently ensures data protection, operational resilience, and recoverability, in alignment with G-Cloud and public sector cloud regulations.

Business continuity statement / plan

Org's approach to business continuity ensures ongoing service for public sector clients by combining strong internal controls with the reliable infrastructure of our key technology partners: UiPath, Druid AI, and Otera. The resilience of these platforms is a primary factor in our decision to partner with them.

Plan Scope

This business continuity plan addresses:

- Delivery and operation of AI, automation, and conversational AI services.
- Customer support and service management.
- Access to cloud-hosted platforms and environments.
- Incident management and escalation procedures.

The plan applies to all Org staff and third-party platform providers involved in delivering our services.

Key Business Areas and Critical Functions

Critical functions maintained under this plan include:

- Ensuring platform uptime and operational integrity for automation, AI agents, and conversational services.
- Facilitating data access and processing within designated environments.
- Continuous monitoring, support, and incident resolution.
- Managing changes, releases, and system configurations.

These areas are vital for uninterrupted customer service.

Dependencies

Org relies on:

- Microsoft Azure cloud infrastructure, as used by UiPath, Druid AI, and Otera
- Vendor-managed SaaS platforms featuring high availability and disaster recovery
- Secure connectivity and identity management solutions
- Org's support and delivery teams operating within the agreed timeframes

All dependencies are established, enterprise-grade technologies widely adopted across the public sector.

Acceptable Downtime

Platform-level reliability, recovery objectives and permissible downtime are governed by each platform provider's standard commitments. These systems are architected to minimise interruptions with redundancy, automated failover and robust design.

Org synchronises its processes with these standards and manages communication with customers during any service incidents.

Maintaining Operations

To ensure continuity during disruptions:

- Platform partners employ resilient, multi-region cloud infrastructures with automated recovery mechanisms
- Org has established clear escalation paths to vendor and incident response teams
- Service delivery and support can continue remotely as needed
- Priority is given to restoring essential services and maintaining communication with clients
- Regular reviews of vendor assurance documents confirm adherence to security, resilience, and continuity requirements

Partner Selection Justification

Org collaborates with UiPath, Druid AI, and Otera because:

- They provide advanced, cloud-native SaaS platforms hosted on Microsoft Azure
- Continuity, disaster recovery, and resilience are integral to their services
- They have a proven track record with public sector and regulated entities worldwide
- Their models reduce single points of failure and mitigate dependency risks

This partnership enables Org to concentrate on service delivery, governance, and client satisfaction, supported by dependable platform reliability.

A comprehensive plan is available upon buyer request.

Privacy by Design

Org incorporates Privacy by Design and Privacy by Default principles into every AI and automation service, fully aligning with Article 25 of the EU GDPR. Safeguarding personal and sensitive data is prioritised from

the earliest stages of service planning and continued throughout delivery, operation, and support. Our approach includes several core practices:

Default data minimisation. We ensure solutions only process the data strictly required for their purpose. Whenever possible, personal data is omitted, masked, or pseudonymised.

Separation of data from automation logic. Automation workflows, AI agents and conversational services are structured so business logic remains independent from personal information, helping to reduce exposure and limit risk.

Adoption of compliant cloud platforms. Partnering with UiPath, Druid AI, and Otera, we use Microsoft Azure for GDPR-compliant data processing, EU data residency options, encryption in transit and at rest, and comprehensive audit logging.

Role-based access and strict privilege controls. System and data access is limited to authorised users through role-based controls and least-privilege principles.

Built-in human oversight. AI decisions and recommendations always include human review to maintain transparency, accountability, and necessary intervention.

Data Protection Impact Assessments (DPIAs). Org conducts DPIAs when handling personal or sensitive data, meeting public sector standards and documenting all processing activities.

Defined data processing roles. Org serves as a data processor or sub-processor based on the buyer's designation, with duties clearly detailed in Data Processing Agreements (DPAs).

Continuous compliance and improvement. We regularly assess privacy controls and data management routines to ensure ongoing GDPR compliance and adapt to regulatory changes.

With this proactive and methodical strategy, privacy is embedded as a fundamental part of Org's AI and automation service design, implementation, and support, rather than treated as an afterthought.

Using the service

Ordering and Invoicing

Public sector buyers can initiate the service by contacting Org via bids@thisisorg.com

Ordering process

Initial enquiry

Buyers email their requirements to bids@thisisorg.com. To help us respond efficiently, we ask that the email includes:

- Organisation name and contact details.
- A brief description of the service required (e.g. automation, AI agents, conversational AI).
- Indicative timelines and objectives.
- Any known governance, security, or data residency requirements.

Requirements clarification

Org will arrange a short discussion to confirm scope, service options available under G-Cloud, and suitability against the buyer's needs. This ensures the service selected aligns with the published G-Cloud offering.

Order Form / Call-off Contract

Org provides support to the buyer in completing the G-Cloud Order Form and Call-off Contract, ensuring:

- Services align to the G-Cloud Service Definition.
- Pricing and service terms are clear.
- Any buyer-specific requirements are documented in line with the framework.

Service commencement

Once the Call-off Contract is signed by both parties, service delivery begins in line with the agreed schedule.

Invoicing

Invoicing is issued by Org in accordance with the agreed Call-off Contract terms. Invoices are typically raised monthly in arrears unless otherwise agreed.

All invoices reference the Call-off Contract and agreed pricing schedule.

Org works closely with buyers throughout the ordering process to ensure clarity, compliance with G-Cloud requirements, and a smooth transition into service delivery.

Availability of Trial Service

Org offers a range of introductory options designed to help public sector organisations safely explore automation and AI before making a full commitment.

Idea2Innovate Workshops (No Cost Provided)

Our Idea2Innovate workshops are complimentary. These sessions guide organisations in identifying where automation and AI can provide maximum value, and typically involve:

- An introduction to RPA, IDP, AI Agents, and Agentic AI.
- Facilitated discussions with operational and front-line teams.
- Spotting pain points, as well as immediate and medium-term opportunities.
- A brief prioritisation session.
- Recommendations for next steps and an initial roadmap.

The goal of these workshops is to help customers gain clarity, reduce uncertainty, and pinpoint areas that promise the greatest impact prior to any formal engagement.

Agentic AI Proof of Concepts (PoCs)

Org can assist clients with Proof of Concepts to demonstrate how Agentic AI, Intelligent Document Processing, or Conversational AI might function in their specific context. A typical PoC may include:

- Setting up a limited, secure use case with off-the-shelf technologies.
- Showcasing how an AI Agent processes information, takes action, and escalates issues when required.
- Testing IDP solutions for document-reading accuracy.
- Demonstrating how a conversational assistant responds to staff or citizen inquiries.
- Evaluating benefits, risks, and outlining next steps with the client

PoCs are scoped collaboratively with the buyer and delivered under mutually agreed conditions to ensure compliance with governance and security standards. (For detailed pricing, please refer to our rate card in the Pricing Document.)

Conditions for Introductory Use

- Trials, PoCs, and workshops are provided at the discretion of Org.
- Activities are restricted to clearly defined use cases aimed at supporting evaluation and decision-making.
- Customer internal governance teams must approve access to systems or sample datasets if needed.
- Any continued use beyond the PoC or workshop would fall under a standard Call-Off Contract.

On-Boarding, Off-Boarding, Service Migration, Scope.

On-boarding Process

Org delivers a well-defined on-boarding protocol to facilitate seamless service adoption and ensure users receive appropriate support. The process encompasses the following steps.

1. Kick-off Meeting

The engagement commences with a kick-off meeting involving principal stakeholders, including delivery leads, technical specialists, and customer representatives. This session clarifies objectives, sets timelines, delineates responsibilities, and establishes communication channels.

2. Designated Points of Contact

Each customer is assigned:

- A Delivery Lead or Project Manager.
- A Technical Lead (specialised in RPA, AI, or IDP as required).
- A Customer Success contact to provide ongoing guidance for the contract duration

These contacts remain consistent throughout the engagement, ensuring continuous support beyond the initial 90 days.

3. Documentation and Access Provisioning

Org provides:

- User guides and documentation tailored for RPA, AI agents, IDP, or Conversational AI.
- Detailed on-boarding instructions.
- Secure access configuration to cloud environments.
- Necessary templates (including process capture, test scripts, and change control documents).

4. Training and Knowledge Transfer

Depending on the selected service, on-boarding may include:

- AI literacy sessions.
- Platform training (UiPath, Druid AI, Otera).
- Workshops facilitating understanding of automation and AI integration.
- Guidance for operational and frontline teams.
- Training is available remotely or in-person, as per agreement.

5. Initial Activities: Configuration and Migration (if applicable)

When needed, Org supports:

- Initial cloud environment configuration.
- Migration of existing automations or documentation to supported platforms.
- Process validation and readiness assessments.
- Pilot or limited-scope deployment prior to full rollout

6. Ongoing Support

Customers can submit queries via email or the customer portal, as outlined in the support section. Users benefit from continuous assistance before, during, and after implementation, aligned with defined support tiers.

Off-boarding Process

Org implements a structured off-boarding process to guarantee an orderly transition when discontinuing services.

1. Termination Notice. Notice periods adhere to stipulations detailed in the Call-Off Contract.

2. Exit Planning. Org collaborates with the client to formulate an exit plan detailing:

- Identification of automations, documents, or configurations for handover
- Timelines for data export
- Scheduling of user access removal
- Transfer of documentation and licences, where applicable.

3. Data Export. Customers are enabled to export their data, logs, process documentation, and configuration details. Org assists by identifying relevant datasets and providing extraction guidance.

4. Access Deactivation. Upon completion of off-boarding:

- User accounts are deleted
- Administrative access is revoked
- Shared cloud-hosted environments with Org are disconnected
- Final confirmation is issued to the customer.

5. Optional Additional Off-boarding Services. At the customer's request (subject to additional fees), Org offers:

- Customised exit planning
- Migration support to alternative suppliers or platforms
- Supplementary knowledge-transfer sessions
- Re-documentation of current automations.

Refer to our rate card in the Pricing Document for further pricing information.

Support Across All Phases of Delivery

Org is committed to supporting customers throughout the entire engagement lifecycle:

- **Pre-delivery:** Idea2Innovate workshops, training, opportunity assessment, and technical readiness evaluation.
- **During delivery:** Active implementation, governance oversight, testing, documentation, and change management.
- **Post-delivery:** Ongoing assistance, monitoring, optimisation, and formal change control processes.

This holistic approach ensures customers are comprehensively supported, regardless of whether they are adopting Org's services for the first time or transitioning away.

Training

Org delivers comprehensive training and onboarding services to empower users in effectively utilising RPA, AI Agents, Intelligent Document Processing, and Conversational AI. These offerings support personnel at all levels of the organisation, ensuring safe and proficient technology adoption across teams.

Online Training and Learning Resources

Users benefit from a wide range of online materials, including:

- Platform-specific user guides (UiPath, Druid AI, Otera).
- How-to videos and introductory modules.
- Knowledge articles on process execution, exception handling, and secure use of AI.
- Documentation outlining governance frameworks, change control processes, and best practices.
- All resources remain accessible throughout the service engagement.

Instructor-led Training

Org offers both remote and onsite instructor-led training, covering:

- **AI Literacy:** Safe and responsible understanding of AI within public-sector environments.
- **Platform Training:** Practical instruction on RPA tools, AI Agents, IDP, and conversational interfaces.
- **Operational Training:** Guidance for frontline staff on day-to-day interactions with automation solutions.
- **Administrator Training:** Managing operational environments, monitoring system performance, and initiating change requests.
- **Training curricula** are tailored to specific roles and delivered according to client requirements.

Please refer to our rate card in the pricing document for detailed pricing.

Introductory / Onboarding Workshops

To facilitate effective orientation, Org provides:

- Kick-off workshops introducing the service offerings.
- Guided walkthroughs of essential features and workflows.
- Sessions focusing on responsible AI usage, governance, and compliance guardrails.
- Opportunity identification workshops utilising Idea2Innovate (offered complimentary).

These workshops enhance staff understanding of service capabilities, usage protocols, and available support resources.

Hands-on Support During Go-Live

During initial deployment, Org supports clients through:

- Assisted setup and configuration guidance.
- Support during preliminary testing phases.
- Collaborative sessions with technical specialists.
- Real-time assistance in monitoring initial automations or AI agents in operational environments.

This approach ensures users receive comprehensive support throughout the transition period. For applicable charges, please consult our rate card in the pricing document.

Ongoing Support and Continuing Education

As part of continuous service delivery, users are provided with:

- Access to the Customer Portal for documentation, support requests, and service updates
- Refresher training sessions to reinforce key competencies
- Additional role-based learning modules as service scope broadens
- Optional advanced training programs for power users and administrators

These initiatives are designed to maintain and enhance user proficiency and confidence on an ongoing basis.

Implementation Plan

Org uses a structured, repeatable implementation methodology designed specifically for RPA, AI Agents, Intelligent Document Processing and Conversational AI projects within the public sector. Our approach ensures that delivery is predictable, transparent and aligned to organisational governance standards.

The implementation process typically includes the following phases:

1. Mobilisation and Kick-off

- Confirm scope, objectives and success measures.
- Establish roles, responsibilities and communication channels.
- Set up project governance, cadence and reporting.
- Complete access, security and environment checks.

2. Discovery and Process Analysis

- Review existing processes, documents and workflows.
- Capture requirements with operational staff and subject-matter experts.
- Assess readiness and identify any gaps.
- Create or refine process documentation and acceptance criteria.

3. Configuration and Build

- Configure automations, AI agents or document-processing workflows using off-the-shelf cloud components
- Implement integrations using standard APIs and connectors
- Apply guardrails, governance controls and responsible AI guidelines
- Conduct internal development testing.

4. Validation and User Testing

- Support buyers in preparing test scenarios and sample data.
- Run user acceptance testing (UAT) with coders, frontline staff or operations teams.
- Collect feedback and make adjustments.
- Validate performance, accuracy, exception handling and auditability.

5. Training and Adoption Support

- Provide user training, AI literacy sessions and role-based guidance
- Supply documentation and help resources

- Support staff during initial use to ensure confidence and safe adoption

6. Go-Live and Early-Life Support

- Agree deployment windows and contingency measures
- Monitor the live solution and resolve issues promptly
- Provide enhanced support during the initial period to ensure stability
- Confirm handover to the buyer or to Org's managed support service

7. Continuous Improvement (where purchased)

- Review performance data
- Identify optimisation opportunities
- Plan follow-up enhancements or new use cases.

Service Management Overview

Org manages this service using a structured, standards-based approach aligned to public sector expectations and the operating models of our strategic software partners (UiPath, Druid AI, and Otera). This is a key reason we partner with these vendors: their platforms are designed to operate within mature enterprise service management frameworks.

Service Constraints

Maintenance windows: Platform maintenance is governed by the underlying software vendors and communicated in advance. Maintenance is typically carried out outside core business hours to minimise disruption.

Level of customisation: The service is delivered using off-the-shelf platform capabilities. Configuration and orchestration are permitted within the platforms' supported frameworks; core product code is not modified.

Deprecation and upgrades: Functionality upgrades and deprecations follow vendor-managed roadmaps. Org proactively communicates upcoming changes, assesses impact, and supports clients through upgrades where required.

Service Management and ITSM Alignment

Org follows ITIL-aligned service management practices for incident, problem, change, and release management. Service requests, incidents, and change requests are logged, tracked, and reported using structured ticketing and workflow processes. Change management includes impact assessment, approval workflows, and rollback planning where appropriate.

Partner-Led Operational Assurance

- UiPath: Enterprise-grade orchestration, monitoring, role-based access control, and release management built into the platform.
- Druid AI: Managed conversational AI lifecycle, including model updates, monitoring, and controlled release of new capabilities.
- Otera: AI-driven automation with built-in monitoring, exception handling, and controlled model evolution.

These partner capabilities allow Org to provide a consistent, well-governed service without introducing bespoke operational risk.

Certifications and Capability

Org team members hold ITIL Foundation-level certifications and have extensive experience operating services in regulated public sector environments.

Our partners maintain recognised certifications (including ISO 27001 and SOC 2) that underpin the operational resilience of the service.

Ongoing Service Management

- Regular service reviews covering performance, incidents, changes, and improvement opportunities.
- Clear escalation paths and defined service ownership.
- Continuous improvement informed by operational metrics and client feedback.

A more detailed service management plan, including SLAs and operational procedures, can be provided to the buyer on request.

Service Constraints

1. Performance and Availability

The service relies on the availability of cloud platforms like UiPath, Druid AI, and Otera. Availability is determined by those platforms' SLAs and their scheduled maintenance. Factors such as network connectivity, customer systems, and access rights can affect service performance.

2. Support Hours

Support hours depend on the customer's chosen support tier:

- Standard support matches normal business hours.
- Extended or round-the-clock support is available for higher-tier customers.
- Incidents submitted outside agreed hours are handled at the start of the next support period.

Support requests can be made through the Customer Portal or via support@thisisorg.atlassian.net.

3. Maintenance Windows

Regular maintenance, updates, and upgrades may happen during vendor-specified periods. Major deployments or changes are coordinated with customers to reduce disruption. Emergency changes for service stability may be implemented immediately, with approval sought afterwards.

4. Customisation Limits

Services use standard, off-the-shelf cloud solutions; bespoke software development is excluded. Only default connectors, APIs, and configuration options from UiPath, Druid AI, and Otera are permitted. Unusual or unsupported customisations may not be possible and might not be covered by support.

5. Data and Integration Constraints

Access to systems, files, or data sets is necessary for setup and testing. IT restrictions (such as firewalls, outdated systems, or missing APIs) can impact integration. Data must adhere to approved formats and governance standards.

6. Deprecation of Features

Feature or functionality retirement follows the lifecycle policies set by the platform providers (UiPath, Druid AI, Otera). Org will inform customers about any announced deprecations and assist with planning, but platform vendors will determine schedules.

7. Service Dependencies

Effective delivery requires active customer involvement, timely sharing of information and system access, and participation in testing and validation.

Any updates triggered by changes in customer systems or processes need to go through official change control procedures.

Service Levels

Org establishes clear service levels covering performance, system uptime, support availability, and incident severity classifications. These standards help ensure reliable operation of automations, AI agents, and related cloud services. Tailored SLAs can be set with purchasers prior to any order and will be formally noted in the Order Form.

1. Performance and Availability

Service quality hinges on the specific cloud platforms deployed (such as UiPath, Druid AI, Otera), each with their own public SLA commitments. Org actively monitors all automations and AI solutions to maintain stability and proactively address issues, following the Managed Service approach. Should performance concerns arise, Org acts according to the buyer's chosen support level.

2. Support Hours

Customers can request assistance via the Customer Portal or by emailing support@thisisorg.atlassian.net. Support hour choices include:

- **Standard:** Core business hours, Monday through Friday.
- **Extended:** Early mornings and evenings.
- **24/7:** Full-day monitoring and incident response for clients needing continuous coverage.

The agreed support coverage and response times are custom-fit to each client and recorded in the Order Form.

3. Incident Severity Levels

Incidents are sorted by their impact on business operations:

- **Severity 1 - Critical:** Total loss of a key automation or AI workflow, significantly hindering main services with no workaround; addressed immediately within agreed support timelines.
- **Severity 2 - High:** Major disruption, partial degradation of outputs; possible workarounds exist but aren't sustainable.
- **Severity 3 – Medium:** Issues that don't threaten core operations but affect performance or behaviour; temporary fixes exist, and permanent resolutions are scheduled for future maintenance.
- **Severity 4 – Low:** Minor cosmetic problems, documentation requests, or small process improvements handled through ongoing updates.

Definitions, response times, and resolution expectations are tailored for each organisation and specified in the Order Form.

4. Change Requests

All requested changes go through a documented process including review, approval, testing, and planned deployment. Larger updates may need extra planning and will be negotiated separately. Change management aligns with Org's established Support Offering protocol.

5. Service Reporting

Org routinely shares service reports containing:

- Incident history and SLA metrics
- Monitoring data and trend evaluations
- Records of changes made
- Suggestions for optimisation or risk reduction.

Reporting intervals are agreed during customer onboarding.

6. Service Level Agreement Process

Before confirming any order, Org collaborates with buyers to:

- Assess operational needs
- Set mutually appropriate service standards
- Determine support hours, expected response times, and escalation routes
- Clearly detail these agreements in the Order Form.

This practice guarantees both transparency and shared understanding before service delivery starts.

Outage and Maintenance Management

Org adheres to IT service management best practices to manage outages and maintenance activities, thereby minimising disruption and ensuring the stable operation of automations, AI agents and cloud services.

Outage Avoidance

Org implements comprehensive preventive strategies to minimise the likelihood of technical issues or delays:

- Proactive monitoring of automations, queues, and AI workflows enables early detection of potential problems.
- Routine health checks on cloud platforms (UiPath, Druid AI, Otera) help identify performance risks pre-emptively.
- Rigorous change control processes ensure that all updates are thoroughly reviewed, approved, and tested prior to deployment.
- Environment segregation (development, test, production) safeguards live services from untested changes.

- Strategic capacity and performance planning ensures that system workloads remain within acceptable thresholds.

These initiatives collectively reduce the risk of outages and mitigate possible service degradation.

Service Performance Planning

To maintain optimal and consistent performance, Org

- Regularly reviews automation run times and throughput metrics.
- Identifies process bottlenecks and recommends targeted improvements.
- Adjusts robot and agent capacity, leveraging scalable cloud solutions where available.
- Collaborates with buyers to plan for peak activity periods.

Performance insights are communicated through service reviews and real-time monitoring dashboards.

Maintenance Management

Maintenance activities are coordinated with platform vendors and buyers:

- Vendor-managed maintenance follows the scheduled windows provided by UiPath, Druid AI, and Otera.
- Org-managed maintenance, including configuration updates and optimisations, is scheduled in advance with buyer input.
- Emergency maintenance may be executed promptly to maintain service continuity or address security concerns, accompanied by retrospective notification and approval.

All maintenance procedures are governed by a structured change management process as detailed in support documentation.

Downtime Measurement and Reporting

Org monitors downtime using cloud platform logs, automation histories, and system alerts:

- Any service interruption is logged, classified by severity, and analysed.
- Key metrics such as uptime, incident duration, root cause analysis, and corrective actions are included in regular service reports.
- Significant outages are communicated to buyers in accordance with established protocols.

Ad-Hoc Service Needs

Org is proficient in responding to unforeseen or urgent requirements:

- Incident triage and rapid assessment are conducted by the support team.
- Technical specialists are allocated to restore services or implement interim solutions.
- Issues are prioritised based on the prescribed severity model.
- Temporary scaling of automations or AI agents is supported during periods of increased demand.

Additional work requirements are scoped and approved through the established change control process.

Financial Recompense Model for not Meeting Service Levels

Org may offer service credits as part of a support contract, defined during service level negotiations and recorded in the Order Form.

Service credits are usually a percentage discount on monthly fees when agreed service targets are missed. Credit terms are set in advance with the buyer, based on support tier and service importance. Credits apply only if a formal support contract with defined SLAs is in place.

Provision of the service

Customer Responsibilities

To enable successful delivery and ongoing management of Org's RPA, AI, and Automation services, the customer must provide the following support, access, and information. These responsibilities reflect standard public-sector delivery expectations and will be detailed in the Order Form (Call-Off Contract).

1. Access and Technical Requirements. Provide timely access to all required IT systems, environments, applications, APIs, and datasets necessary for configuration, testing, and deployment, ensure appropriate network permissions, firewall rules, and credentials are in place to support integrations and Provide sample data (anonymised where required) to support testing, validation, and accuracy verification.

2. Personnel and Engagement. Make available subject-matter experts, process owners, operational staff, and technical contacts to support discovery, testing, and adoption, participate in workshops, reviews, and training sessions as required and provide timely feedback throughout discovery, configuration, testing, and go-live phases.

3. Governance and Approvals. Review and approve key deliverables, including requirements, process definitions, test outcomes, and change requests, notify Org of any planned changes to systems, processes, or data that may impact automations or AI workflows and maintain internal governance to ensure compliance with data protection, information security, and organisational policies.

4. Infrastructure and Licensing. Confirm the availability of suitable infrastructure or cloud resources for platforms such as UiPath, Druid AI, and Otera, in line with vendor requirements, retain responsibility for managing all software licences assigned to the customer under the Call-Off Contract.

Where the customer already holds licences for platforms such as UiPath, the customer must notify the relevant vendor (e.g. UiPath) that Org is to be appointed as their authorised reseller and delivery partner under G-Cloud 15, for Org to provide implementation, support, and managed services.

5. Operational Responsibilities. Complete agreed User Acceptance Testing (UAT) activities and formally confirm readiness for production deployment, report incidents or service issues via the agreed support channels (Customer Portal or support@thisisorg.atlassian.net) and follow documented procedures for submitting change or enhancement requests.

6. Security and Data. Ensure all data shared with Org complies with applicable legal and regulatory requirements, including GDPR, provide data in approved formats and maintain appropriate controls for sensitive or confidential information and promptly notify Org of any security incidents or changes that may affect service delivery.

7. End-of-Service Responsibilities. Complete data export and internal archiving prior to off-boarding and formally confirm when Org may deactivate or remove user access following contract termination.

Technical Requirements and Client-Side Requirements

To deliver RPA, AI Agent, Intelligent Document Processing, and Conversational AI services, the following must be in place and will be agreed with the buyer before ordering.

1. System Access

- Customer provides system, application, and environment access.
- User accounts with necessary permissions.
- API/integration access if needed.
- VPN or secure network access as required.
- Test environments mirroring production.

2. Data

- Buyer supplies sample data (anonymised if necessary) in approved formats.
- Permission to use data on authorised cloud platforms.
- Relevant documents and process artefacts available.
- Compliance with data governance policies.

3. Technology Environment

- Supported versions of all relevant applications/systems.
- Stable connectivity to Org's cloud platforms.
- Required client-side components installed.
- Browser compatibility for web interfaces.

4. Resources and Time

- Subject matter experts and technical contacts available for workshops, validation, and testing.
- Users allocate time for discovery, UAT, and training.
- Prompt decision-making and governance for approvals.
- These requirements are mandatory.

5. Licensing and Infrastructure

- Buyer maintains required licences.
- Internal infrastructure meets vendor specs.
- Legacy/unsupported systems must be disclosed before delivery.

6. Agreement

- All requirements will be discussed, jointly agreed, and documented in the Order Form before delivery begins.

Outcomes/Deliverables

This service enables public sector organisations to obtain clearly defined outputs and results that facilitate the secure and effective implementation of RPA, AI Agents, Intelligent Document Processing, and Conversational AI. As stipulated in the Order Form, the service may encompass:

Deliverables

- Discovery and assessment materials, including process reviews, identification of opportunities, and readiness evaluations.
- Outcomes from Idea2Innovate workshops, such as prioritised opportunity lists and an initial strategic roadmap.
- Configuration of RPA workflows, AI agents, or IDP models utilising industry-standard cloud platforms.
- Comprehensive technical documentation, including process definitions, configuration guides, runbooks, and support manuals.
- Integration setup via standard APIs and platform connectors.
- User acceptance testing (UAT) materials, comprising test scripts and detailed result documentation.
- Training resources and sessions addressing both AI literacy and platform-specific content.

- Governance and operational guidelines, incorporating change management strategies, guardrail documentation, and support procedures.
- Deployment into designated environments with ongoing monitoring and early-stage support.

Outcomes

- Reduction in manual workloads and acceleration of processing times.
- Increased accuracy and consistency achieved through automation and AI-supported decision-making.
- Enhanced experiences for both staff and citizens by streamlining responses and minimising bottlenecks.
- Strengthened organisational readiness for AI adoption via comprehensive training and robust governance protocols.
- Establishment of a scalable framework for automation and AI, allowing progressive expansion to additional processes.
- Improved transparency and auditability provided through platform dashboards and structured governance mechanisms.

Development life cycle of the solution

Org primarily uses an Agile delivery approach, while retaining the flexibility to align with customer-specific governance, assurance, or procurement requirements where elements of Waterfall or hybrid models are preferred. This is particularly important in public-sector environments where stage gates, formal approvals, and documentation are required.

Our delivery lifecycle typically follows the stages below:

1. **Identify Problems / Needs.** We work with stakeholders to clearly define the business problem, operational need, or service outcome. This includes understanding volumes, risks, compliance constraints, and success measures.
2. **Plan.** We agree scope, priorities, dependencies, and delivery approach. This includes confirming environments, security requirements, licensing, and governance. A high-level delivery plan and milestones are agreed.
3. **Design.** Solution design is completed using off-the-shelf capabilities of platforms such as UiPath, Druid AI, and Otera. This includes process design, data flows, integration approach, and human-in-the-loop handling where required.
4. **Build.** Solutions are configured and developed iteratively, with regular reviews and demonstrations to stakeholders. This allows early validation and rapid adjustment based on feedback.
5. **Test.** Testing includes functional testing, integration testing, exception handling, and user acceptance testing (UAT). Where required, test evidence is produced to support assurance and audit needs.
6. **Deploy.** Deployment to production follows agreed change and release processes, including approvals, scheduling, and rollback planning. Go-live support is provided to ensure stability.
7. **Maintain and Improve.** Ongoing support, monitoring, and continuous improvement are provided. Enhancements are prioritised through an agreed backlog, ensuring the service continues to deliver value over time.

Flexibility for Customer Requirements

While Agile is our default approach, we adapt to customer needs by:

- Supporting formal stage gates and documentation where required
- Aligning with public-sector governance and assurance processes
- Delivering in phased or waterfall-style milestones when mandated

This ensures solutions are delivered efficiently while remaining compliant with organisational and regulatory requirements

After-sales Account Management

Org delivers structured account management designed to foster robust customer relationships, ensure sustained satisfaction, and support the development of long-term partnerships. Our methodology is anchored in transparent communication, ongoing improvement initiatives, and alignment with our customers' strategic objectives.

1. Dedicated Account Management

Each client is assigned an Account Manager or Customer Success Lead, serving as the principal point of contact following implementation.

This role ensures consistent engagement, coordinates activities across delivery and support teams, and facilitates strategic alignment.

2. Regular Communication and Service Reviews

We conduct routine review meetings to evaluate service performance, address incidents, discuss improvements, and consider future requirements.

Clients receive regular updates regarding automation outcomes, platform utilisation, and optimisation opportunities. Open channels of communication are maintained throughout the contract term to respond promptly to inquiries or evolving needs.

3. Continuous Improvement

Org collaborates closely with clients to identify enhancements, explore new use cases, and maximise delivered value. Insights from monitoring, lessons learned, and user feedback inform the ongoing refinement of services and recommendations for optimisation or scalability of automation solutions are proactively provided.

4. Relationship Building and Long-term Support

We prioritise understanding each client's objectives to ensure services evolve in tandem with organisational requirements. The Account Manager is responsible for maintaining alignment with operational targets, regulatory obligations, and technological standards.

Org positions itself as a strategic partner, supporting comprehensive long-term planning beyond immediate project delivery.

5. Escalation and Governance Support

Clear escalation procedures are established to address any operational or service-related concerns. The account team provides governance support, including assistance with security assessments, audits, and compliance reviews where necessary.

6. Strategic Partnership Development

Org's account management approach is collaborative, encouraging the exploration of new opportunities such as:

- Additional automation or AI applications
- Process optimisation
- AI literacy and staff enablement
- Enhancement of responsible AI governance frameworks.

Our objective is to serve as a long-term transformation partner rather than a transactional vendor.

Termination Process

The termination of services is conducted according to the provisions outlined in the Call-Off Contract and any relevant Order Form. These documents specify notice requirements, responsibilities for each party, and applicable charges.

1. Notice of Termination

Either party may terminate the service by delivering written notice, adhering to the notice period stipulated in the Call-Off Contract. The customer acknowledges that the service is purchased for a Minimum Period (and any Renewal Terms) as defined in the Certificate or Order Summary.

2. Early Termination

Early termination may be granted; however, associated charges may apply if services have been contracted for a fixed Minimum Period or if non-cancellable costs have been incurred on behalf of the customer. All early termination fees will be explicitly identified in the Order Form prior to commencement of services.

3. Responsibilities During Termination

Org Responsibilities:

- Provide an exit plan detailing the necessary steps for orderly service wind-down.
- Facilitate data export, documentation transfer, and knowledge handover as required.
- Remove system access and revoke credentials following off-boarding completion.
- Issue final reports, where necessary, such as outstanding tickets, process logs, or performance metrics.

Customer Responsibilities:

- Submit the required notice in accordance with contractual terms.
- Complete internal processes related to data export, archiving, or transition.
- Confirm when Org may proceed with user access removal or deactivation.

- Settle any outstanding fees up to the termination date, including any agreed early termination charges.

4. Data and Access Removal

Customers are permitted to export their data within the timeframe specified in the exit plan. Upon completion of export, Org will remove user accounts, administrative access, and any associated hosted environments.

5. Optional Exit Support

Additional support during off boarding, such as tailored migration assistance or extended transition services, is available upon request. These services will be scoped individually and billed in accordance with the Org rate card.

6. End of Contract Confirmation

When all obligations have been satisfied, Org will issue written confirmation of service termination and closure of all access.

Evidencing Our Experience

Org's Delivery Team Experience

Org and its members have extensive experience supporting automation, artificial intelligence, and process improvement initiatives across both public and private sectors. The following examples demonstrate the tangible outcomes delivered by our team and showcase how these approaches can be effectively translated into public sector environments.

Case Study 1: NHS Trust – Intelligent Document Processing in Clinical Workflows

Problem: A medium-sized NHS Trust was challenged by the need to manually verify and enter large volumes of clinical forms, resulting in administrative backlogs, inconsistent data quality, and delays in patient pathway updates.

Action: Org deployed an Intelligent Document Processing (IDP) solution utilising UiPath Document Understanding. The model was customised for Trust-specific documentation, with validation loops implemented to enhance accuracy. Staff engagement throughout the project ensured alignment with both clinical and administrative requirements.

Outcome:

- Achieved a 90% reduction in manual data entry
- Accelerated updates to clinical systems and improved overall data quality
- Lowered administrative burden, enabling staff to dedicate more time to direct patient care
- Established comprehensive audit trails for compliance and governance purposes

This methodology is transferable to any high-volume document processing environment, including local authorities, healthcare, housing, education, or justice services.

Case Study 2

Central Government – Automation of Pre-Employment Background Checks

Problem: A central government department experienced delays and inconsistencies in pre-employment background checks due to manual data management across multiple systems, creating bottlenecks in recruitment processes.

Action: Members of Org's automation team designed and implemented UiPath-driven automations to collect, validate, and process applicant information. Automated exception handling and structured reporting mechanisms were established to ensure precision and reliability.

Outcome: The Government Chief People Officer commented: 'We now have three fully automated processes enabling us to complete these checks 70% faster and at a much higher accuracy than before'.

This approach is applicable to licensing verifications, HR onboarding, compliance reviews, benefits assessments, and any repetitive validation workflow within the public sector.

Case Study 3: National Utility Provider – Process Improvement and Automation (Private Sector)

(Adapted for public sector applicability)

As a trusted partner to our client, Org Group has demonstrated expertise in Business Process Management (BPM), process improvement, and process reengineering. Serving 1.2 million customers

through our brand, Abtran, we have worked collaboratively to optimise, redesign, and reengineer critical business processes, ensuring efficiency, cost-effectiveness, and enhanced customer satisfaction.

Optimisation and Process Improvement:

The client faced challenges with its phone-based customer meter reading service, which was slow, repetitive, and prone to advisor fatigue and data entry errors. This process inefficiency impacted the overall customer experience, increased operational costs, and limited performance.

Using advanced analytics and customer insights, we collaborated to continuously refine and optimise their processes. Our approach was centred on using automation and innovative technology to drive improvement and operational efficiency.

Redesign and Reengineering:

To address the inefficiencies, we introduced a robotic process automation (RPA-UiPath) solution, delivering the following benefits:

- **Streamlined Operations:** The robotic solution simplified the customer meter reading process, making it faster, secure, and user-friendly.
- **Compliance and Security:** A comprehensive test plan ensured the solution met all necessary security and compliance requirements.
- **Continuous Optimisation:** By tracking meter reading capture, our team optimised the process further with real-time reporting of outputs and exceptions. Over time, machine learning capabilities reduced exceptions significantly, resulting in a more robust and error-free process.

Long-Term Impact:

Through this collaboration, Org group enabled our client to achieve its goals of continuous performance improvement, proactive service enhancement, and cost efficiency. This partnership highlights our ability to:

1. Optimise existing processes for better performance and efficiency.
2. Redesign workflows to align with strategic objectives.
3. Reengineer processes to deliver transformational results.

By integrating automation and focusing on continuous improvement, we have not only contributed to reshaping our client's customer service processes, but have also set the foundation for ongoing innovation and success.

This case study demonstrates our commitment to delivering measurable business outcomes and fostering long-term partnerships built on trust and performance excellence.

Outcome:

- Enhanced speed and security of data capture.
- Substantial reduction in manual intervention and human error.
- Improved customer service experience.
- Sustained performance improvements through ongoing optimisation.

Relevance to Public Sector: Similar strategies can benefit public sector organisations handling high-volume transactions, such as contact centres, housing repairs, permit applications, waste management services or financial processing.

this is Org

Advising, Resourcing and Delivering
Transformational Change for Organisations