



Transformation Suite

Strategy, Performance & Delivery Management Platform



Service Definition

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Why 5Y?

We take a different approach to data transformation

We believe transformation starts with insight, not systems. We're disrupting the traditional landscape with a suite of platforms, services and solutions that get you from raw data to insights faster and more cost-effectively than ever before.



Faster Insights. Lower Costs. Better Outcomes. Guaranteed.

We empower organisations to become data-centric by accelerating access to data from any system or application. We transform this data into actionable insights that guarantee to drive improved business outcomes and enable sustainable growth.

We're confident we can deliver these outcomes because we've done it for others—turning data chaos into clarity and inefficiencies into savings.

80%

of your BI analytics ready out of the box from day one

50%

faster implementation, freeing up your team's time and budget

50%

reduction in data engineering costs

*The "80% analytics-ready" figure applies specifically to engineering tasks such as data ingestion, integration, and preparation. The 50% faster implementation and 50% reduction in engineering costs are based on our observed averages across typical client projects. Actual results may vary depending on project scope, data quality, and unique business requirements.

We believe in a data-centric future.

Everything we do is driven by the following four principles...

Build systems, deliver outcomes.

Our aim is always to go beyond technology, helping organisations use data to drive meaningful, lasting change.

Insight should be embedded, not episodic.

We designed our platforms to not only unify data but also empower people to act on it every day.

Independence over dependency.

Our goal is to enable customers to self-serve, not to lock them into long-term service contracts.

Enablement, not ownership.

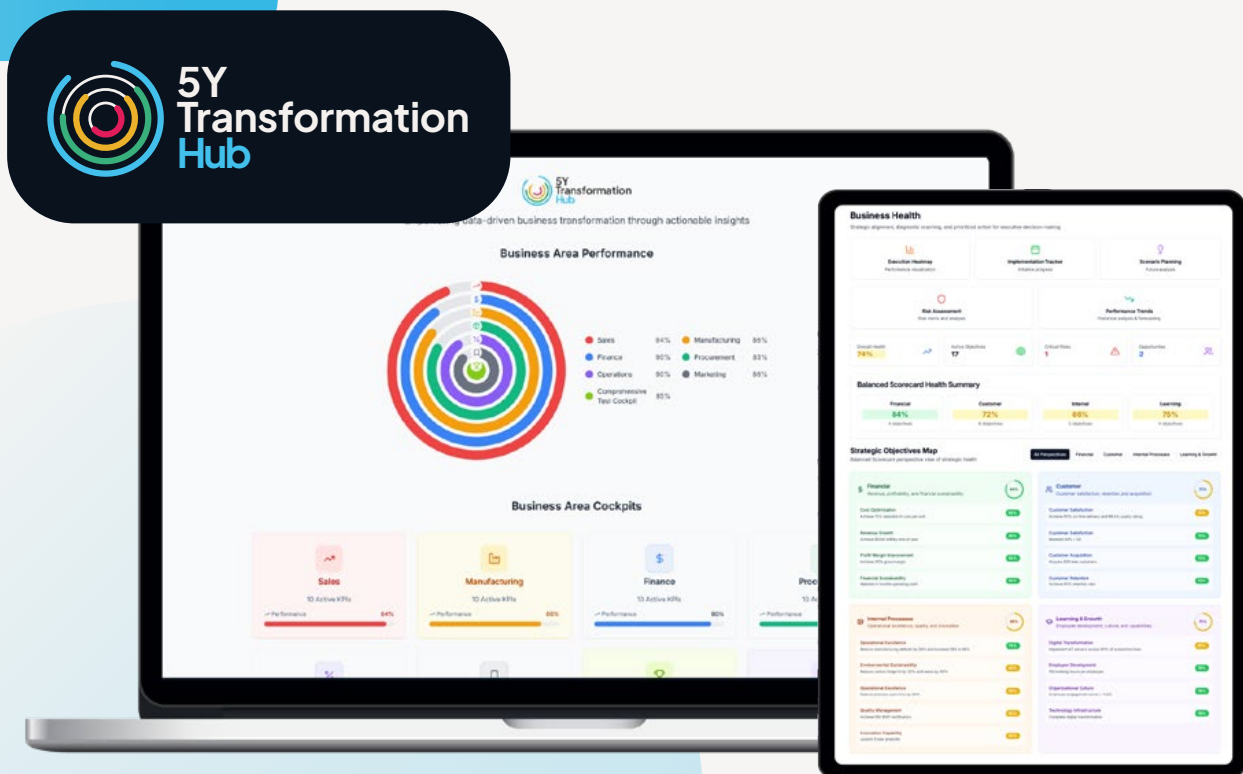
We built a modular platform so customers could scale at their own pace. Where customers need additional support, we offer a managed service model to help them succeed.

The 5Y way

We believe organisations shouldn't have to choose between speed, quality and cost when becoming data-driven. The world is constantly evolving and businesses that build systems from scratch or rely on slow, expensive consultancies will get left behind.

Service Definition

5Y Transformation Suite provides a single platform for managing strategy, performance and delivery. It supports the definition of strategic objectives and KPIs (including balanced scorecard views), tracks business health using Red/Amber/Green ratings and trends, and manages initiatives, milestones, risks/opportunities and scenario (“what-if”) planning. It also provides dynamic dashboards (“cockpits”) for performance reporting and reviews.

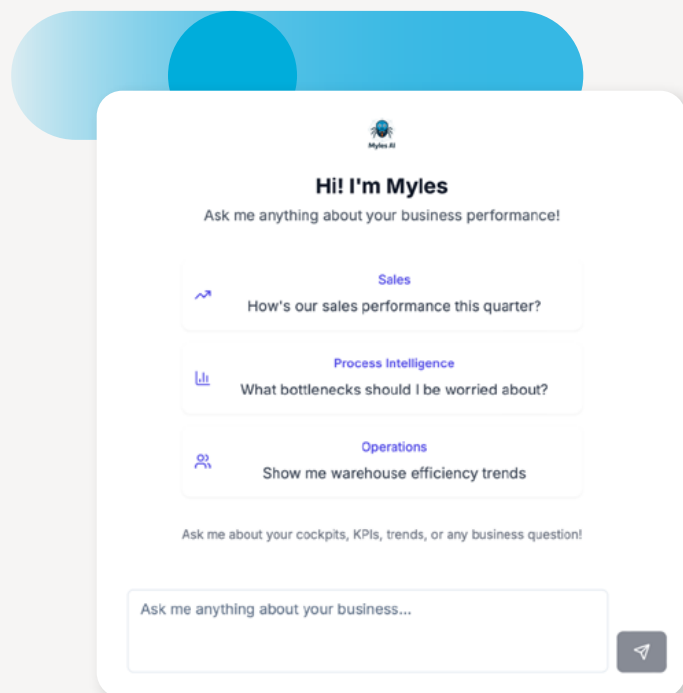


Detailed Service Description

5Y Transformation Suite is a dynamic platform that brings strategy, performance and delivery management into one place.

It provides configurable “cockpits” (dashboards) for different areas of the organisation (e.g., Finance, Operations, HR, sales), with KPI cards, targets, trend indicators, time-period filtering, sparklines and a range of chart options, plus automated insights based on the data shown.

It also includes process intelligence to map and analyse business processes, identify bottlenecks and track process performance over time. For strategy and performance management, it supports balanced scorecard objectives (Financial, Customer, Internal Process, Learning & Growth), RAG health scoring with trend history, a strategy execution heatmap, and tools to manage initiatives including milestones, dependencies, resources, risks/opportunities and scenario planning. Analyst Insights provides structured external analysis with tagging, prioritisation, source links and approval controls.



Myles AI Assistant lets users ask questions about business data in plain English and generate results and charts, with conversation history and role-aware access. The platform includes user profiles and session controls, admin configuration for organisations, roles, users, tiers and approvals, secure multi-tenant access with auditing and threat monitoring, data integration via API connections.

Target Users

Executive teams / corporate leadership: performance and delivery reviews, strategy execution heatmap, health scoring, scenario comparisons.

Performance / strategy teams: defining objectives and KPIs, maintaining scorecard structure, preparing review packs from the same data.

Programme and portfolio managers (PMO/PPM): initiative tracking (status, milestones, dependencies), prioritisation, risk/opportunity oversight.

Operational managers (Finance, Procurement, HR, Service Ops, etc.): functional cockpits, KPI targets/trends, process visibility and bottleneck focus.

Public-sector bodies requiring structured performance management: (e.g., local authorities, NHS trusts/ICBs and related organisations), where controlled access and separation of information is required.



Summary

What it enables

- Definition and tracking** of strategic objectives and KPIs (including balanced scorecard views)
- Interactive performance dashboards** and functional cockpits, with targets, RAG status and trend views
- Management of initiatives and actions** (including milestones, dependencies, ownership and priorities) linked to objectives
- Risk and opportunity management** alongside performance, using consistent assessment and review
- Structured scenario** (“what-if”) planning to test options and understand likely impact
- Process visibility** to identify bottlenecks and track process performance over time
- More consistent performance reviews** through standard scoring, time-period views (current/quarter/year) and drill-down to supporting detail
- AI-assisted querying** and narrative insights to help interpret results and explain what’s changing and why

What decisions it supports

- Executive and directorate performance and delivery reviews (what is on track, what is not, and why)
- Prioritisation of initiatives and actions based on impact, status and dependencies
- Allocation and reallocation of resources to address pressure points and delivery risk
- Early intervention decisions triggered by RAG health scores, trends and emerging risks/opportunities
- Comparison of alternative approaches using structured “what-if” scenario planning
- AI powered insights, into initiatives & actions, risks, and process visibility.

How it's accessed

- Web-based application that supports users out of the box.
- Supports single sign-on (SSO) with most major identity providers (e.g., Entra ID) using SAML/OIDC.
- Role-based access control & feature permissions.
- Supports secure APIs to submit and update performance data (e.g., KPIs and process metrics) from other systems, reducing manual rekeying and enabling more frequent updates.

Where it runs / data control

- Hosted and operated by 5Y as SaaS service, with per-customer isolated resources and data stores.
- Customer can retain control of data through the use of APIs and IdP.

Core Features

1

Unified performance “command centre”

- A single view for executive and senior leaders, and managers to review organisational performance and delivery status.
- Role-based dashboards (“cockpits”) that bring together KPIs across different functions (e.g., finance, operations, HR).
- Traffic-light (Red/Amber/Green) status indicators with targets and trend views over defined time periods.
- One place to view strategic objectives, KPIs, initiatives and risks, with drill-down to supporting detail where needed.

2

Strategy–execution alignment

- Shows how delivery activity and initiatives contribute to agreed strategic objectives.
- Supports the definition of strategic objectives (balanced scorecard: Financial, Customer, Internal Process, Learning & Growth) and links them to measurable KPIs and initiatives.
- Strategy execution heatmaps showing progress and areas requiring attention.
- Initiative management with owners, priorities, statuses, milestones and dependencies, linked back to objective.

3

Scenario planning and foresight

- Supports decision-making when considering changes to budget, timelines or policy.
- Structured “what-if” scenarios (e.g., budget or timeline changes).
- Comparison of scenarios using scenario planning and predictive dashboards to understand likely impacts.
- Optional AI-assisted insight to help interpret scenario results and summarise implications.

4

Risk and opportunity management

- Helps organisations identify, track and manage risks and opportunities linked to performance.
- Risk registers with severity scoring, owners and mitigation plans.
- Opportunity records with action plans.
- Traceability from risks/opportunities to affected objectives and KPIs.

5

Process intelligence and functional cockpits (where configured)

- Provides domain-specific performance views for functions such as Finance, Procurement and Operations.
- API data ingestion of process data from core ERP and CRM systems.
- Pre-built cockpits for functional domains (e.g. Finance, Procurement, Operations), aligned to strategic KPIs.

6

AI and smart insights

- Helps users explore performance information and understand trends using natural language queries (e.g., “show the latest finance health score”, “which KPIs are declining”, “what’s driving the change”).
- Supports conversational querying to find and filter objectives, KPIs, initiatives and risks, and to generate views and charts from the underlying data.
- Produces narrative insights that summarise what has changed, where performance is improving or worsening, and which measures or areas are contributing most.
- Can organise and prioritise insights (e.g., by theme/category and importance) to support review agendas and follow-up actions.
- Respects security and privacy boundaries defined in the customer environment, including role-based access so users only receive answers based on information they are permitted to see.

7

Settings/Configuration Features

- Configure organisational profile information (e.g., mission, vision, values and strategic priorities).
- Set up and maintain the performance structure, including cockpit types, sections, KPIs, targets and reporting periods.
- Configure strategic objectives (including balanced scorecard perspectives) and the way health scoring and status (RAG) is applied.
- Set up initiative tracking rules, including statuses, priority levels, milestones and dependency fields.
- Configure the risk and opportunity assessment approach (e.g., scoring matrix and categories).
- Manage user access through roles, permissions, invitations and approval workflows.
- Maintain reference lists and categories used for filtering and reporting (e.g., insight categories/tags, process library entries).
- Control what content is available to different user groups (e.g., by tier or organisational area) to support consistent use.

8

Information assurance and sovereignty

- Supports public-sector information assurance, data residency and sovereignty requirements.
- Suitable for information up to OFFICIAL / OFFICIAL-SENSITIVE.
- Hosted as SaaS with dedicated isolated data stores.
- Option for customer-managed encryption keys (BYOK) when 5Y hosts.

9

Authentication and access control

- Built in local authentication with the ability to connect to most major identity providers, including but not limited to Azure, Google, Microsoft, etc.
- Role-based access control.
- Optional row-level security in the database by organisation

10

Backup, DR and high availability (within chosen platform)

5Y operates backups, disaster recovery and high availability as part of the SaaS service, including encrypted backups, defined retention, and restore testing. Target availability is defined in the service terms/SLA.

Application designed to be redeployed rapidly with database restore; targeted availability aligned to platform (e.g. 99.9%+ during business hours).

12

Service management

- | UK-based support desk.
- | ITIL-aligned incident management.
- | Quarterly service reviews and account management.

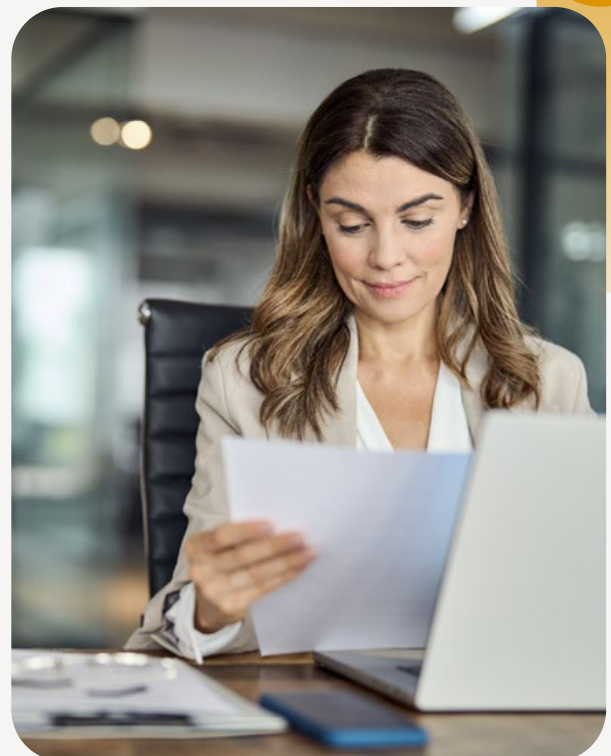
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Training & knowledge transfer

| Administrator and end-user training during onboarding.

| Admin and user guides; knowledge base access.

| "Train the trainer" approach for long-term self-sufficiency.



Benefits

Key benefits for public-sector organisations include:



Consolidated performance view – reduces reliance on multiple spreadsheets and slide packs by bringing objectives, KPIs, risks and initiatives into one place.



Clear link from strategy to delivery – explicit links between objectives, KPIs and initiatives support accountability and more structured performance reviews.



Earlier identification of issues – health ratings, trends and risk information help highlight under-performance and emerging risks sooner.



Better decision support – scenario (“what-if”) planning and optional AI-assisted insights help compare options using consistent information.



Use of existing data sources – can use existing curated data (for example from a data warehouse or 5Y Engineering Hub), reducing duplication of data preparation work.



Reduced manual effort for performance cycles – supports monthly/quarterly reviews directly in the platform, reducing the need to compile separate reporting packs.



Data control and governance – supports role-based access and data separation; where deployment requires it, data can remain within the customer environment through the use of APIs or within agreed hosting boundaries.



Training and documentation – in-app guidance and supporting materials to help users adopt the platform and use it consistently.

Add On 5Y Connect

5Y Connect is a mobile first add on to the 5Y Transformation Suite that delivers role based, personalised insights and lightweight action capabilities for users on the move. It preserves the Hub's data model, governance and audit trails while optimising content, navigation and interactions for mobile contexts.

Key Features

Role based cockpits — personalised mobile home screens with KPI cards, priorities and assigned actions tailored to each role.

Micro workflows — one tap actions such as approve, assign, comment, escalate and update initiative or risk status.

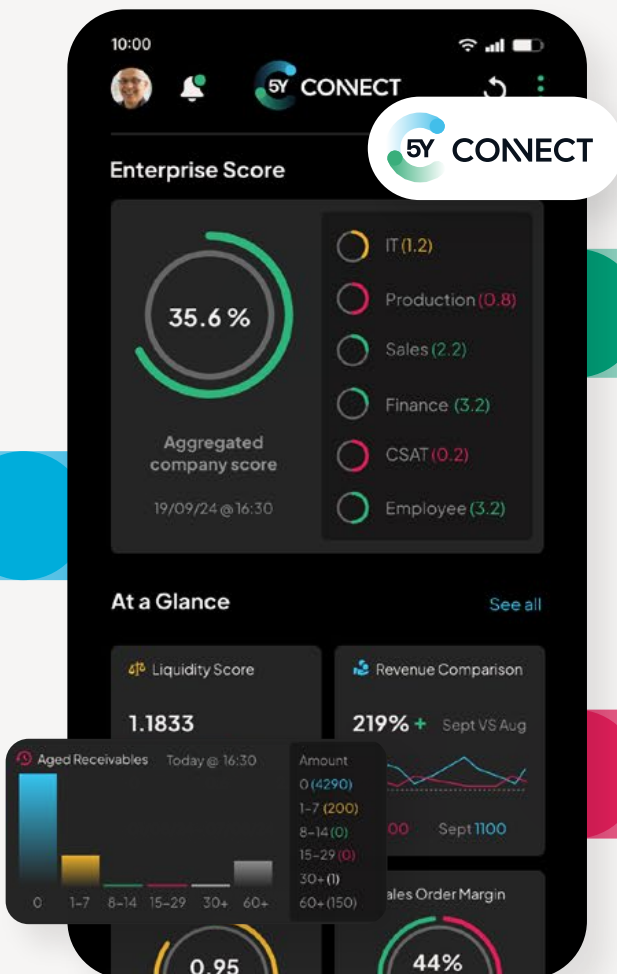
Push notifications — configurable alerts for KPI/RAG exceptions, approvals due and critical risks with controlled notification content.

Offline support and sync — local caching for read/write of key items; queued updates synchronise when connectivity is restored.

Mobile AI summaries — concise narrative insights and short natural language answers optimised for mobile screens.

Governance and traceability — all mobile actions recorded in the Hub audit trail with role aware visibility and approvals preserved.

Device and authentication support — biometric sign in, SSO integration and optional MDM/device registration.



Target Users and Use Cases

Primary users — executives, managers, field operatives, housing officers and PMO leads who need rapid, role relevant information and the ability to act from a mobile device.

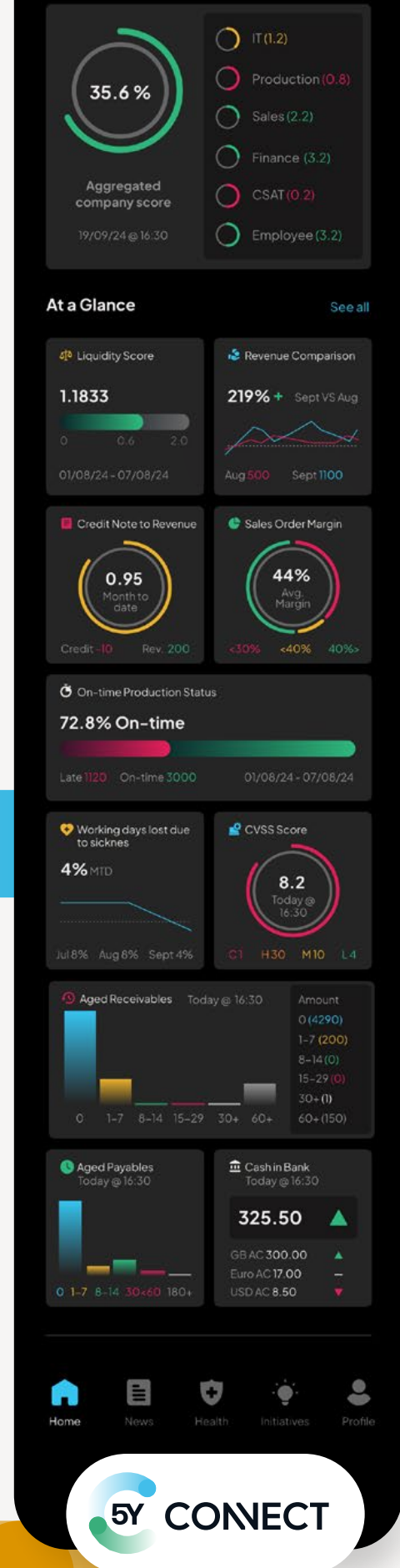
Typical use cases — push RAG alerts to executives; field capture of risks with photo evidence; manager approvals from notifications; daily KPI digests for frontline teams.

Access Deployment and Security

Deployment model — add on to existing Hub deployments; mobile apps (iOS/Android or PWA) connect to Hub APIs in the customer tenancy or 5Y hosted environment.

Security controls — local cache encryption, TLS transport, configurable notification content, optional MDM integration, device registration and conditional access policies.

Data residency — offline and cached mobile data follow the same residency and encryption rules as the Hub; offline retention and sync policies are configurable by the customer.



Public-Sector Use Cases

Local Government (LG)

- Corporate performance dashboards combining service metrics (e.g. finance, social care, waste services) with strategic objectives.
- Council-wide risk register linked to statutory and corporate objectives.
- Scenario planning for budget changes, demand variation or emergency events (e.g. shocks affecting service levels).
- Ability to present KPI alerts to service managers in the field (e.g. housing or waste operations).

NHS and health bodies

- Strategic performance monitoring for Trust or ICS-level objectives (e.g. quality, activity, waiting times) where patient-related data must remain within accredited UK environments.
- Risk registers and initiative tracking for major programmes (e.g. elective recovery, digital transformation).
- Use of the Hub as a strategic layer over existing data platforms, ensuring patient data stays within NHS-controlled infrastructure.

Central government departments and arm's-length bodies

- Departmental outcome delivery planning and KPI tracking.
- Cross-programme risk and initiative oversight aligned to departmental objectives.
- Scenario modelling for policy or funding changes, with traceability across objectives and initiatives.

Housing (via data platform / Analytics Content / Connect)

- Use of End-to-End Solutions and Analytics Content to provide housing operational KPIs (repairs, voids, arrears), surfaced in the Transformation Suite for strategic review.
- Mobile distribution of housing KPIs and alerts to housing managers via 5Y Connect.

High-Level Architecture Summary

The 5Y Transformation Suite is deployed as a web-based application hosted as SaaS with data isolation.

Deployment options

5Y-hosted in a UK-region Azure environment with dedicated resources per customer.

Key components

Web application (front-end and API) – e.g. Azure App Service / containers.

PostgreSQL database storing configuration, objectives, KPI definitions, scenario data, risks and commentary.

Integration components to read KPI data from curated data sources (e.g. Data Ingestion APIs, Engineering Hub Gold layer, data warehouse, Power BI datasets or CSV imports).

Optional integrations: Power BI Embedded, Microsoft Teams notifications, Azure OpenAI for Myles (where enabled in the customer's subscription).

Data flows (high level)

1. Source systems (ERP, CRM, line-of-business) feed curated datasets, typically via Engineering Hub or existing ETL.
2. Transformation Suite connects to these curated datasets to retrieve KPIs and related data or alternatively via an API connection to client's own hosted datasets.
3. Users access dashboards and enter updates (e.g. commentary, initiative status, risk assessments) via the web application.
4. Myles AI reads from the database and configured datasets; any AI processing, where Azure OpenAI is used, can be constrained to the customer's Azure subscription.

Security boundaries

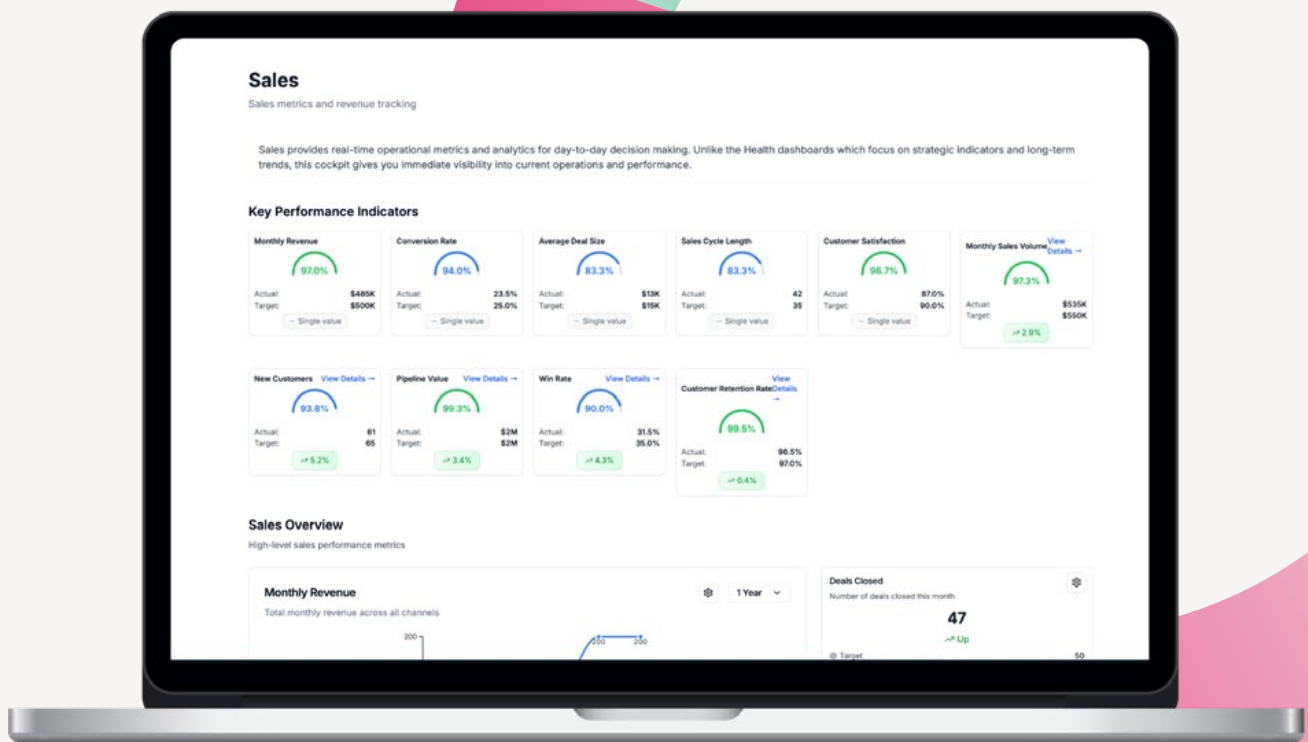
- Dedicated 5Y data isolation; no data co-mingling.
- Built in Identity management sets the boundary or through the customers own IdP. All user access is authenticated using RBAC.
- Audit logs can be forwarded to the customer SIEM; optional integration with network controls.

Accessibility position (WCAG 2.2 AA)

Web UI and user documentation are designed to meet WCAG 2.1 AA with a roadmap to 2.2 AA; cross-service commitments reference WCAG 2.2 AA for all user-facing UIs and documentation.

Accessible formats are provided for documentation (e.g. for security, GDPR and privacy information).

Reasonable adjustments are available on request, with ongoing testing and remediation as part of continuous improvement.



Onboarding process

Onboarding is structured and collaborative:



Typical initial deployment can be completed in 2–3 weeks for a limited scope, with longer timescales for wider organisational coverage.

Offboarding and exit

Offboarding is designed to ensure all data and knowledge remain with the customer:

1

Data export & retention

- | All Hub data resides in the Postgres database hosted in the 5Y cloud.
- | Final backup or database export provided as required.
- | Optional exports to CSV/Excel for objectives, KPIs, risks, initiatives and scenario records.

2

Knowledge transfer

- | Updated configuration and schema documentation provided for internal records or successor supplier.

3

Shutdown & deletion

- | Decommission web application and related services.

4

Post-offboarding support

- | Limited support for clarification and data export during transition, subject to agreed terms.



Customer and supplier responsibilities

Shared responsibilities matrix (summary)

Area	5Y responsibilities	Customer responsibilities
Identity & access	Integrate application with IdP; implement RBAC and RLS mechanisms.	*Manage Identity management system, group membership, joiners/leavers and role assignments.
Data & integrations	Configure connectors to curated sources; support integration troubleshooting.	Provide curated KPI data sources, maintain data quality, manage source system changes.
Application configuration	Configure Hub to reflect definitions; advise on configuration options.	Define objectives, KPIs, targets, hierarchies and risk scoring rules.
Operations & monitoring	Provide guidance on monitoring; investigate application-level incidents.	Monitor source systems and underlying platform; respond to alerts from own tooling.
Security & compliance	Design application to follow least privilege, encryption and logging practices; support audits.	Define organisational policies, approve data classifications and retention policies.
Licensing & contracts	Provide SaaS licence for Transformation Suite and Connect; adhere to G-Cloud terms.	Maintain licences for hosting platform and associated tools (e.g. Power BI).

*Not required if customer selects SaaS

SLAs, support hours and accessibility support

Support hours

Standard support: 09:00–17:30 UK time, Monday–Friday (excluding UK public holidays).

Out-of-hours escalation available for P1 incidents by arrangement or contract specification.

P1 – Critical

Definition: Complete service outage or critical business impact.

Initial response: within 1 hour.

Restoration / workaround: within 4 hours.

Full resolution: within 1 business day.

P2 – High

Definition: Major functionality loss with significant user impact, partial operation possible.

Initial response: within 4 hours.

Workaround: within 1 business day.

Full resolution: typically within 2 business days.

P3 – Medium

Definition: Minor issue, moderate impact, or usage question.

Response: within 1 business day.

Resolution: within 5 business days or next scheduled release.

P4 – Low

Definition: Cosmetic issue, documentation request or enhancement suggestion.

Response: within 2 business days.

Resolution: planned into future update cycle.

Accessibility support

Support available via email, phone and (where provided) portal.

Reasonable adjustments for users with accessibility needs (e.g. alternative communication formats).

Security summary

- | Dedicated SaaS data isolated environment.
- | Network security via HTTPS/TLS 1.2+ and optional private network integration.
- | Data at rest encrypted (e.g. platform-native database encryption).
- | Key management using Azure Key Vault where 5Y hosts; option for customer-managed keys.
- | Input validation and protection against common web vulnerabilities (aligned to OWASP Top 10).
- | Regular penetration testing and customer-initiated tests supported.
- | Supplier certifications and position
- | 5Y Technology holds Cyber Essentials certification and operates ISO 27001-aligned processes; the organisation is not currently ISO 27001 certified.

GDPR summary

- | Customer is the Data Controller for personal data processed in the Transformation Suite. 5Y is a Data Controller in scenarios where the customer has requested for 5Y to host the data.
- | 5Y acts as Data Processor due to data being presented in its hosted solutions.
- | Personal data typically limited to user identities, initiative owners and similar role-based attributes.
- | Data residency: UK data centres for UK public-sector customers if customer selects; no customer data is co-mingled between clients.
- | Data retention is pending the location of the hosted data (5Y vs Customer); standard data deletion is 30 days but can be extended if requested by the customer.
- | Support for data subject rights (e.g. DSAR) via full access to records and ability to assist in identifying relevant data.
- | AI features as enabled by OpenAI and are in full control by the customer.

Sub-processor use

Where 5Y hosts components, Cloud (UK regions) acts as primary sub-processor for infrastructure (compute, storage, database, key management).

Optional use of Azure OpenAI as a sub-processor for AI features, typically in the customer's own subscription.

No additional sub-processors are named in the document; sub-processor list should be confirmed and documented for the final submission.

Data residency, retention & deletion

Data residency for UK public-sector customers is in UK data centres (at customer preference), either in the customer's own tenancy or an Azure environment operated by 5Y.

Retention and deletion of Hub data follow customer policy; the system does not enforce specific retention periods by default.

At contract termination, data is retained or exported as directed by the customer; any copies held by 5Y for support are securely deleted with written confirmation.

Client Success Story

From Fragmentation To a Unified Patient Experience



The Challenge:

Our client, a leading global healthcare group in the hearing care sector faced significant challenges after a major acquisition program in North America, inheriting fragmented and unstable legacy systems. These included customer relationship management (CRM) tools, patient management platforms, and heavily customised ERP systems, all containing overlapping and inconsistent B2C data. The challenge was immediate and complex: How do you consolidate private patient data across fragmented, unstable legacy systems into a single, trusted view—without disrupting ongoing operations or breaching regulatory compliance frameworks such as GDPR?

The Solution:

Deployment of the 5Y Unified Data Platform addressed these challenges by unifying data across legacy systems through a modular, Azure-native framework. With pre-built logic for mastering, survivorship, and recovery, the platform enabled seamless integration between modern front-end applications (CMS, AC App) and backend systems like NAV 17 and Dynamics CE. This solution maintained patient data, enhanced patient engagement across their care journey through stable omnichannel experiences and provided a scalable foundation for future growth—all while maintaining full compliance and operational continuity.

Business Impact

- Transformed disconnected patient records into a single trusted view
- Eliminated costly system outages

-70%
Duplicates

+85%
Matching

2×
Processing

12+
Countries

Client Success Story

From complex reporting requirements to actionable insights



The Challenge:

How do you give every team timely access to operational insights when manual reports are slowing you down? That was the challenge facing one of the UK's largest providers of affordable and social rent housing. While they had implemented Microsoft Dynamics 365 across the organisation, reporting remained slow, fragmented and heavily reliant on manual processes. A traditional system upgrade hadn't resolved the problem. Without a consistent, centralised reporting environment, decision-making was delayed and operational oversight was limited.

The Solution:

We deployed the 5Y Business Transformation Platform to centralise reporting, improve operational oversight and simplify access to key metrics across the business. By integrating Dynamics 365 with internal systems and applying a pre-built data model, we created a templated, cloud-based reporting and analytics environment aligned with the organisation's strategic goals. The outcome enabled teams to achieve real-time access to critical data through a single source of truth, replacing slow, manual reporting with governed, consistent insights.

Business Impact

Seamless integration of Dynamics 365 and other core systems

A secure, scalable environment designed for long-term transformation

80+
Self-Serve KPIs

Pricing model

Indicative pricing model is fully specified in the Pricing Schedule.

Annual subscription per organisation, structured by:

- | User bands and/or organisational scope.
- | Core features included (objectives, KPIs, initiatives, risk, dashboards).
- | Optional modules (e.g. AI scenario module, functional cockpits, 5Y Connect).
- | All software, standard support and updates included in the subscription.
- | Cloud infrastructure costs (e.g. Azure hosting, Power BI licences, Azure OpenAI) are excluded and borne by the customer.
- | Volume discounts and bundled pricing may apply, especially when purchased with Engineering Hub and/or Analytics Content.
- | Invoicing typically annual in advance, with alternative schedules (e.g. quarterly) agreed at call-off.



Our Social Commitments

At 5Y, we believe business success goes hand in hand with responsibility. Our social commitments reflect our dedication to people, communities, and the planet.



Fair Work & Well-being

- | Fair pay above the National Living Wage.
- | Flexible working and open culture.
- | Health and well-being initiatives, including mental health support and certified Mental Health First Aiders.



Equality & Inclusion

- | Gender and ethnicity pay gap monitoring.
- | Active Women in Tech group and DEI training.
- | Recruitment practices promoting diversity and accessibility.



Skills & Growth

- | Personal Development Plans for every employee.
- | Annual training allowance and access to global certifications.
- | Apprenticeships and graduate programmes to nurture talent.



Community & Charity

- | Two paid volunteering days per year.
- | Annual charitable giving: A percentage of profit before tax donated to employee-chosen charities.
- | Partnerships with local charities and associations.



Environmental Action

- | Commitment to biodiversity initiatives such as tree planting
- | Working towards Net Zero through carbon offsetting initiatives

Together, we create a positive impact – for our people, our communities, and our planet.



Ethics & Responsibility

- | Mandatory modern slavery, sexual harassment and ethics training.
- | Whistleblowing and grievance policies.
- | Strong safeguarding and compliance processes.





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