



Digital Transformation & Strategic Roadmapping Services



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 Overview

Digital Transformation & Strategic Roadmapping Services are designed for public sector organisations facing stalled or fragmented transformation efforts, unclear digital priorities, or pressure to justify investment decisions.

This service supports public sector teams that have multiple digital initiatives underway but lack clarity on which to pursue, how to sequence them, or how to align them with organisational strategy, capacity and constraints.

We provide consultancy led advisory support to help organisations assess their current digital maturity, identify opportunities for improvement, and design target operating models that align strategy, people, process, data and technology. Our approach ensures digital initiatives are evidence based, strategically aligned and sequenced for value, with practical roadmaps that support investment decisions and implementation planning.

Service Features

Our service activities follow a structured and repeatable advisory framework, grouped into four clear phases:

1

Assessment & Discovery

Activities may include:

- Digital capability and maturity assessments, including 'as is' and 'to be' analysis
- Gap analysis and identification of organisational or technical constraints
- Stakeholder interviews and discovery workshops across business and IT
- Example contexts: analysing legacy estates in local authorities, assessing operational service bottlenecks within NHS directorates, evaluating data fragmentation across multi agency environments

2

Strategic Design & Target Operating Models

Activities may include:

- Target operating model design across people, process, information and technology
- Definition of future state capabilities to support digital service delivery
- Alignment of digital and cloud initiatives with organisational strategy and policy
- Example contexts: designing cross department digital roles, aligning case management transformation with corporate strategies

3

Prioritisation & Options Appraisal

Activities may include:

- Outcome based prioritisation of digital initiatives
- Options appraisal including cost, benefit, risk and dependency analysis
- Development of investment cases and business justification
- Example contexts: prioritising automation demand in resource constrained teams, sequencing cloud adoption roadmaps for directorates

4

Roadmapping & Strategic Delivery Planning

Activities may include:

- Phased digital transformation roadmaps detailing sequencing, dependencies and milestones
- Identification of delivery risks and implementation constraints
- Executive and stakeholder engagement workshops to secure alignment and commitment
- Documentation of strategy, assumptions, recommendations and actionable next steps
- Example contexts: preparing digital transformation portfolios for budget cycles, structuring programmes around external regulatory deadlines

Service Benefits

Engaging this service can help organisations to:

- ✓ Gain clarity on strategic digital priorities and intended outcomes
- ✓ Make evidence-based decisions on transformation investment and sequencing
- ✓ Align technology, people and business strategy for coherent change
- ✓ Reduce uncertainty and risk during planning for complex change
- ✓ Improve organisational readiness for digital transformation delivery
- ✓ Provide a structured foundation for future delivery and implementation planning

Service Scope

The Digital Transformation & Strategic Roadmapping Services provide advisory-only support, helping public sector organisations assess their current digital maturity, define future-state operating models, and design practical roadmaps for transformation. The scope of this service includes:

Digital capability and maturity assessments, including 'as-is' and 'to-be' analysis across processes, people, technology and data.

Gap analysis to identify organisational, technical and strategic constraints, enabling evidence-based prioritisation.

Stakeholder engagement, including interviews, discovery workshops and cross-functional engagement sessions.

Design of target operating models, covering future-state roles, processes, capabilities, information flows and enabling technology.

Prioritisation and options appraisal, evaluating initiatives based on outcomes, cost, benefit, risk, dependencies and organisational capacity.

Development of phased transformation roadmaps, including sequencing, dependencies, delivery considerations and actionable next steps.

Documentation of strategy, recommendations, assumptions and strategic risks, supporting business cases, budget planning and governance approvals.

This service provides structured advisory guidance to inform decision-making and prepare organisations for future delivery, but does not include implementation or technical delivery of solutions.

Service Constraints

Delivery of this service is dependent on the following:

An agreed scope of work and documented acceptance, defining required assessments, workshops, outputs and deliverables.

Timely access to relevant organisational documentation and information, such as strategies, operating models, performance data, system overviews or existing transformation artefacts.

Availability of appropriate customer stakeholders for workshops, interviews, validation and decision-making activities.

Dependencies on third-party systems, suppliers or compliance regimes, which may influence analysis, design or recommendations.

What Is Not Supported

The service does not include, unless explicitly agreed under a separate statement of work:

- Implementation of transformation initiatives
- Technical delivery of solutions
- System build, integration or configuration
- Managed services or operational support

Delivery is advisory in nature and concludes upon completion of the agreed analysis, recommendations and roadmap deliverables.

Support Delivery Model

Support for the Data Migration & Integration Services is focused on enabling successful delivery of migration, validation and integration activities throughout the project lifecycle.

Support covers discovery, mapping, cleansing, testing, migration execution, integration configuration and cutover readiness. It does not include live operational support unless contracted separately.

Support Hours & Availability

Core Support Hours

Support is available during standard UK business hours:

- | Monday–Friday, 09:00–17:30 (UK time)
- | Excludes UK public holidays

During core hours, customers can access:

- | Email and ticketing support
- | Phone support
- | Scheduled workshops and progress meetings

Out of Hours Availability

Out-of-hours support may be provided where explicitly agreed, typically for:

- | Key executive presentations
- | Urgent strategic review meetings
- | Time-sensitive approvals aligned to governance cycles or budget deadlines

Urgent Issue Handling

Given the advisory nature of the service, “urgent issues” relate to strategic blockers such as:

- | Availability constraints impacting workshops
- | Need for rapid clarification ahead of governance forums
- | Time-critical executive updates

These are prioritised with same-day acknowledgment and next-available-slot scheduling.

How Support Requests Are Raised

Email

Used for clarifications, document exchanges, follow-up questions, and requests for revisions.

Online Ticketing System

Provides a clear audit trail of:

- | Requests
- | Drafts and revisions
- | Comments and questions
- | Document updates
- | Workshop outputs
- | Accessible and WCAG 2.2 AA compliant (consistent with all Lot 3 services).

Phone Support / Scheduled Calls

Used for:

- | Rapid clarifications
- | Steering preparation
- | Strategic alignment sessions
- | Prioritisation and decision-support conversations

Named Engagement Lead

Acts as the primary point of contact to:

- | Coordinate workshops
- | Manage deliverables
- | Maintain communication cadence
- | Escalate blockers

Issue & Escalation Management

Issue Identification & Logging

Issues commonly relate to:

- | Missing or incomplete organisational inputs
- | Conflicting stakeholder perspectives
- | Constraints impacting roadmap sequencing
- | External dependencies (e.g., compliance deadlines)

These are logged through email or ticketing.

Severity Assessment

Strategic delivery issues are assessed as:

- | High: Blocks roadmap development or derails agreed timelines
- | Medium: Affects depth/quality of analysis but not progress
- | Low: Minor clarifications or documentation refinements

Escalation Routes

- | Consultant → Senior Advisor
- | Senior Advisor → Engagement Lead
- | Engagement Lead → Practice Lead

Escalation is triggered when:

- | Timelines are impacted
- | Decisions are delayed
- | Cross-department alignment cannot be achieved independently

Communication During Incidents

Customers receive:

- | Acknowledgement of logged issues
- | Regular updates
- | Requests for additional information
- | Confirmation upon resolution

Post Incident Reporting

Provided when major issues arise:

- | Summary of root cause
- | Strategic or operational implications
- | Recommended remediation steps

Remote and On Site Support

Remote Support (Default)

Used for:

- | Discovery interviews
- | Cross-functional workshops
- | Maturity assessments
- | Prioritisation sessions
- | Roadmap walkthroughs

On Site Support (Where Agreed)

Beneficial for:

- | Executive facilitation
- | Departmental alignment workshops
- | Complex multi-stakeholder sessions
- | High-value strategic presentations

Resourcing Model

Named Engagement Lead

Provides:

- | A single point of contact
- | Oversight of assessment and roadmap development
- | Coordination of specialists (e.g., operations, technology, data, change management)

Pooled Advisory Team

May include:

- | Digital transformation consultants
- | Operating model specialists
- | Business and service design experts
- | Cloud and technology strategy consultants
- | Policy, risk and governance specialists

Engagement Types

Ad-Hoc Advisory Support

For standalone strategy questions or single-topic deep dives.

Time Boxed Engagements

For:

- | Maturity assessments
- | Target operating model design
- | Prioritisation workshops

Full Strategic Roadmapping Engagement

The most common model, covering:

- | Assessment
- | Strategic design
- | Prioritisation
- | Roadmapping
- | Executive alignment

Onboarding & Service Initiation

Onboarding ensures alignment on scope, stakeholders, inputs, timelines and engagement approach.

1. Kick Off & Engagement Mobilisation

- | Introduction to the advisory team
- | Agreement on objectives, constraints and success criteria
- | Review of available documentation
- | Confirmation of strategic priorities
- | Identification of key stakeholders
- | Setup of collaboration channels and cadence

2. Information Required From the Customer

To initiate the engagement, the customer must provide:

- | Organisational strategies, plans, service models and existing digital artefacts
- | Access to key stakeholders for interviews/workshops
- | Understanding of organisational constraints (budget, policy, regulatory)
- | Details of existing initiatives and known dependencies

3. Confirming Scope, Timelines & Responsibilities

- | Final scope validation
- | Roadmapping of engagement phases
- | Agreement of review points and governance checkpoints
- | Allocation of roles (Engagement Lead, SMEs, sponsors, decision-makers)

Offboarding & Exit Support

Offboarding ensures a clear and complete transition, with all strategy and roadmap artefacts handed over.

1. Offboarding Activities

- | Final delivery of strategic documents, models and roadmaps
- | Knowledge transfer sessions on approach, analysis and recommendations
- | Executive presentation and walkthrough (where requested)
- | Documentation of assumptions, risks and dependencies
- | Final clarification of next-step actions and delivery considerations

2. Information Required From the Customer

- | Confirmation of deliverable acceptance
- | Approval to remove access to internal resources
- | Identification of BAU owners for strategy maintenance

3. Confirming Scope, Timelines & Responsibilities for Exit

- | Sign-off of all deliverables
- | Agreement on any follow-on phases (if applicable)
- | Formal close-down of the engagement

Security & Data Protection

The service is advisory-only and does not involve hosting or processing operational data; however, strategic artefacts and sensitive organisational information are handled securely.

Access Controls

- | Access restricted to authorised advisory staff
- | Least-privilege model applied
- | All access revoked at offboarding

Alignment with UK GDPR

- | All processing is minimal, purpose-specific and documented
- | Data used only to deliver agreed advisory outcomes
- | Customer remains the data controller

Secure Handling of Customer Data

- | All documents stored in approved, secure systems
- | Sensitive strategy or organisational data handled confidentially
- | No operational datasets are processed

Secure Communication Channels

- | Encrypted email
- | Secure file-sharing
- | Managed conferencing platforms

Hosting & Data Location

Because this service is advisory-only, no hosting of customer systems or data occurs.

Support System Hosting

Collaboration tools, ticketing systems and document repositories are hosted in secure cloud environments with enterprise controls

No Persistent Hosting of Customer Data

- Temporary working files are deleted at offboarding
- No customer systems, workloads or data pipelines are ever hosted on supplier infrastructure

Customer Data Residency

- Only organisational strategy documents or relevant artefacts are stored
- No production data is hosted
- All stored material remains within UK or UK-aligned regions

Residency for Support Logs & Artefacts

- Support logs include only contact details and interaction notes
- Stored in secure, compliant UK or UK-aligned regions
- Retained only for contractual and audit requirements

Pricing Information

Pricing for this service is provided in the G-Cloud pricing document.

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

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.





hello@5ytechnology.com

5ytechnology.com