Service Definition: Service Optimisation and Right Sizing

About SOCITM Commercial Ltd

SOCITM Commercial provides independent, vendor-agnostic advisory and delivery support to local authorities, mayoral combined authorities and wider public sector organisations.

Acting as a trusted advisor and critical friend, we help clients navigate complex technology, service and organisational change. Our collaborative and evidence-based approach connects technology decisions with strategic priorities, service outcomes, affordability, deliverability and public value.

We bring an understanding of local government reform, devolution, shared services, digital transformation and ERP, CRM and EAM programmes. We work alongside client teams to simplify complex decisions, provide objective challenge and identify practical options tailored to each organisation's needs.

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1. Service overview

Our Service Optimisation and Right Sizing service helps local authorities, mayoral combined authorities and wider public sector organisations improve value, performance and sustainability across technology and service delivery.

The service provides independent, vendor-agnostic assessment of cloud utilisation, ERP, CRM and EAM usage, operating models, licences, integrations, data storage and data legacy arrangements. We identify under-use, duplication, avoidable cost, process inefficiency and opportunities to consolidate or simplify.

Recommendations are prioritised by value, risk, effort and dependency, helping clients optimise existing investments while protecting service continuity and public value.

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2. Who the service is for

The service is designed for public sector organisations that are:

- Seeking better value from ERP, CRM or EAM
- Reducing cloud and technology costs
- Rationalising legacy data and storage
- Reviewing licences, modules and integrations
- Optimising shared services or operating models
- Addressing under-used system capability
- Planning local government reform consolidation
- Improving sustainability and service performance

3. Challenges the service addresses

- Under-used ERP, CRM or EAM functionality
- Duplicated systems, licences or integrations
- Excess cloud capacity and avoidable consumption
- Legacy data increasing storage and migration cost
- Manual processes and workarounds
- Unclear ownership of optimisation and benefits
- Operating models misaligned to demand
- Supplier recommendations not independently tested

4. Scope of the service

The precise scope is agreed with the client and may include:

Area	Examples
ERP optimisation	Modules, processes, licences, controls, reporting and adoption
CRM optimisation	Customer data, cases, channels, workflows and user adoption
EAM optimisation	Asset data, work orders, lifecycle, mobile use and integrations
Data legacy	Retention, archival, duplication, storage and migration scope
Cloud optimisation	Compute, storage, databases, networks, resilience and commitments

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Applications and licences	Portfolio duplication, utilisation, contracts and rationalisation
Operating model	Roles, demand, capacity, support and service management
Benefits and sustainability	Savings, performance, resilience, carbon and public value

5. Our approach

Our approach is collaborative, proportionate and evidence-based. It is tailored to the organisation, transformation context and decisions the engagement must support.

1. Mobilise and agree scope: Confirm services, systems, cost areas, evidence and success measures.

2. Establish the baseline: Gather utilisation, cost, performance, licence, process and data evidence.

3. Assess ERP, CRM and EAM usage: Review modules, users, workflows, integrations and benefits.

4. Assess data legacy: Review duplication, retention, archival, storage and migration implications.

5. Identify inefficiency and risk: Analyse waste, under-use, complexity, resilience and service impacts.

6. Model options: Compare optimisation, consolidation, right-sizing and rationalisation scenarios.

7. Prioritise recommendations: Rank opportunities by value, effort, risk and dependency.

8. Develop the roadmap: Provide phased actions, governance and measures for sustained improvement.

6. Assessment and delivery framework

The framework is agreed with the client and may include:

- Service outcomes and user demand
- ERP, CRM and EAM utilisation
- Data legacy cost and risk
- Cloud consumption and performance
- Licensing and commercial arrangements
- Process efficiency and automation
- Integration complexity and duplication
- Operating model capacity and capability
- Security, resilience and compliance

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- Sustainability, benefits and public value

7. Deliverables

Deliverables are tailored to the requirement and may include:

- Current-state utilisation and cost assessment
- ERP, CRM and EAM optimisation findings
- Data legacy rationalisation assessment
- Cloud and infrastructure right-sizing recommendations
- Application and licence rationalisation options
- Process and operating model improvement findings
- Cost-benefit and scenario models
- Prioritised quick wins and long-term actions
- Risk and dependency register
- Optimisation and implementation roadmap
- Governance and benefits tracking framework
- Executive summary and decision presentation

Outputs are provided in accessible, commonly used formats suitable for integration into programme governance, business cases, procurement, implementation and internal delivery processes.

8. Example cases

Context	How the service can help
ERP optimisation	Improve module use, processes, controls, licences and benefits.
CRM optimisation	Improve customer data, workflows, channels and adoption.
EAM optimisation	Improve asset data, work management and lifecycle value.
Data legacy rationalisation	Reduce duplication, storage, migration scope and retention risk.
Cloud right sizing	Align capacity, commitments and services with actual demand.
Local government reform	Identify consolidation and standardisation opportunities.

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Shared services	Optimise common platforms, roles and support models.
Operating model review	Align capacity, governance and resources to service need.

9. Public sector standards and good practice

Where relevant, the service considers applicable public sector guidance, legislation and client policies, including:

- Government Cloud First policy
- Technology Code of Practice
- NCSC cloud security guidance
- Government Data Quality Framework
- Data protection and information governance expectations
- Public sector value-for-money and sustainability principles
- Client finance, commercial and service management policies

Applicable standards and assurance requirements are agreed during mobilisation. The client retains responsibility for formal compliance, approvals, procurement and investment decisions.

10. Engagement model

The engagement is scoped according to organisational complexity, evidence availability, stakeholder participation and the breadth of systems, services and organisations involved. Delivery can be remote, on-site or hybrid and may include interviews, workshops, evidence review, analysis, co-design and executive briefings.

Timescales, team composition, deliverables and commercial arrangements are agreed for each engagement, enabling focused support or a broader organisation-wide assignment.

11. Knowledge transfer

Knowledge transfer is embedded throughout the engagement. We work alongside client teams, explain the methods used and provide reusable artefacts where appropriate. This builds internal confidence and supports sustainable ownership after the engagement.

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12. Why SOCITM Commercial

- Public sector focus across local government and combined authorities
- Independent, vendor-agnostic advice and objective challenge
- Trusted advisor and critical friend approach
- Understanding of reform, devolution and shared services
- Experience across ERP, CRM, EAM and data legacy modernisation
- Evidence-based recommendations designed for governance decisions
- Practical focus on affordability, deliverability and public value

13. Service boundaries

Service Optimisation and Right Sizing is an advisory and analytical service. Unless separately commissioned, it does not include production configuration changes, licence purchasing, contract negotiation authority, data deletion, migration execution, software development or ongoing managed optimisation.

14. Client responsibilities

- Provide timely access to relevant stakeholders and documentation
- Confirm scope, governance, decision authorities and priorities
- Provide available system, data, supplier and programme information
- Identify applicable policies, standards and assurance requirements
- Validate factual findings, assumptions and recommendations
- Retain responsibility for compliance, approvals and implementation decisions

15. Client outcomes

- Improved value from ERP, CRM and EAM investments
- Reduced cloud, licence and support waste
- Lower data legacy cost and risk
- Improved system and service performance
- Simpler applications, integrations and processes
- Better operating model alignment and capacity use
- Prioritised and evidence-based optimisation actions
- Stronger ongoing cost and benefits governance

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