Service Definition: Delivery Road Mapping

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 Delivery Road Mapping service helps local authorities, mayoral combined authorities and wider public sector organisations plan and coordinate complex transformation programmes.

Acting as a trusted advisor and critical friend, SOCITM Commercial develops strategic, delivery and implementation roadmaps supporting local government reform, devolution, ERP, CRM and EAM implementation, data legacy modernisation, shared services, cloud migration and digital transformation. We provide structured, realistic and evidence-based plans that align organisational objectives, resources, governance and delivery activities.

Our roadmaps translate strategic ambitions into practical delivery plans, helping organisations understand priorities, dependencies, risks, resource requirements, governance arrangements and expected outcomes while creating clear pathways for successful transformation.

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2. Who the service is for

The service is designed for organisations that are:

- Planning local government reform
- Delivering devolution programmes
- Establishing shared services
- Implementing ERP, CRM or EAM solutions and modernising legacy data
- Migrating services to the cloud
- Delivering digital transformation programmes
- Introducing target operating models
- Modernising legacy technologies
- Managing transformation portfolios
- Seeking better delivery governance and prioritisation

3. Challenges the service addresses

- Unclear transformation priorities
- Complex programme dependencies
- Limited delivery capacity
- Competing organisational demands
- ERP, CRM and EAM implementation complexity, including data legacy dependencies
- Uncertain resource requirements
- Governance challenges
- Weak benefits tracking
- Transformation programme risks
- Lack of a clear implementation pathway

4. Scope of the roadmap

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

Area	Examples
Transformation programmes	Digital transformation and modernisation initiatives
ERP, CRM and EAM programmes	ERP, CRM and EAM implementation, migration and optimisation, including data legacy workstreams
Cloud adoption	Migration and cloud service adoption programmes

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Organisational change	Workforce, governance and operating model change
Shared services	Service integration and consolidation
Local government reform	Transition and implementation planning
Devolution	New authority and service responsibilities
Data and technology	Platforms, integrations and data migration
Service redesign	Resident-facing and internal service improvements
Portfolio planning	Programme prioritisation and sequencing

5. Our approach

Our approach is collaborative, proportionate and evidence-based. It is tailored to the organisation's transformation context, delivery maturity and decision timetable.

1. Mobilise and agree scope: Confirm objectives, stakeholders, governance, planning horizon, expected outcomes and required outputs.

2. Understand the current state: Review strategies, programme plans, architecture outputs, capability assessments and existing commitments.

3. Define outcomes and priorities: Agree intended outcomes, benefits, strategic priorities and decision criteria.

4. Structure the roadmap: Organise delivery into logical phases, workstreams, increments, milestones and decision points.

5. Map dependencies and risks: Identify technical, organisational, commercial, procurement and workforce dependencies.

6. Model resources and capacity: Assess people, skills, funding, supplier and delivery capacity requirements.

7. Validate and refine: Test assumptions, sequencing and feasibility through collaborative workshops and critical friend challenge.

8. Support governance decisions: Present an agreed roadmap, implementation considerations and executive-level decision materials.

6. Planning framework

Roadmap components are agreed with the client and may include:

- Strategic priorities and programme outcomes
- Agile, traditional or hybrid delivery approaches
- Programme increments, releases and delivery phases
- Milestones, gateways and decision points
- Workstream sequencing and dependency management
- Resource, capacity and capability planning
- Benefits realisation and outcome measures

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- Governance, reporting and assurance activities
- Procurement, commercial and supplier dependencies
- Workforce readiness and organisational change
- Technology, data and migration readiness
- Risk, issue and contingency planning

7. Deliverables

Deliverables are tailored to the requirement and may include:

- Strategic transformation roadmap
- ERP, CRM and EAM implementation roadmap
- Local government reform transition roadmap
- Devolution programme roadmap
- Cloud migration or modernisation roadmap
- Phased delivery plan and milestone schedule
- Dependency map and critical path analysis
- Resource and capacity plan
- Benefits realisation plan
- Risk, issue and assumption register
- Governance, assurance and reporting framework
- Executive roadmap presentation and dashboard
- Reusable roadmap templates and tracking tools

Outputs are provided in accessible, commonly used formats suitable for integration into programme governance, transformation portfolios, business cases, budget planning and delivery management processes.

8. Example cases

Context	How the service can help
Local government reform	Establish phased transition, consolidation and implementation plans.
Devolution	Plan new responsibilities, operating arrangements and transformation activity.
Mayoral combined authority	Coordinate priorities, partners, dependencies and regional delivery.
ERP, CRM and EAM implementation	Define ERP, CRM, EAM and data legacy phases, dependencies, readiness and benefits.
Shared services	Plan mobilisation, integration and transition across organisations.
Cloud migration	Create sequenced migration and modernisation pathways.

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Target operating model	Plan implementation, capability development and organisational transition.
Transformation portfolio	Prioritise programmes, resources, dependencies and benefits delivery.

9. Public sector standards and good practice

Where relevant, the roadmap considers applicable public sector guidance, delivery frameworks and client policies, including:

- Government Service Standard and GOV.UK Service Manual
- Technology Code of Practice
- Agile, product-led and iterative delivery principles
- Programme and portfolio management good practice
- Government spending control and assurance requirements
- Benefits management and business case principles
- NCSC security and cloud guidance
- Accessibility and inclusive design requirements
- Data protection and information governance expectations
- Commercial, procurement and supplier management requirements

Applicable standards, assurance requirements and organisational methodologies are agreed during mobilisation. The service provides planning advice and recommendations; responsibility for formal approvals, compliance, funding and delivery decisions remains with the client and relevant governance bodies.

10. Engagement model

The engagement is scoped according to programme complexity, number of workstreams, planning maturity, evidence availability and stakeholder participation. Delivery can be remote, on-site or hybrid and may include interviews, workshops, planning sessions, evidence review, scenario modelling and executive briefings.

Timescales, team composition, deliverables and commercial arrangements are agreed for each engagement, enabling either a focused roadmap or a broader multi-programme transformation plan.

11. Knowledge transfer

Knowledge transfer is embedded throughout the engagement. We work alongside client teams, explain the roadmap method and provide reusable artefacts where appropriate. This supports internal ownership and enables the roadmap to be governed, maintained and adapted as circumstances change.

12. Why SOCITM Commercial

- Public sector focus across local government and combined authorities
- Independent, vendor-agnostic advice and objective challenge

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- Trusted advisor and critical friend approach
- Understanding of reform, devolution and shared services
- Ability to connect strategy, technology and service outcomes
- Agile, traditional and hybrid planning approaches
- Practical focus on affordability, deliverability and public value

13. Service boundaries

Delivery Road Mapping is an advisory and planning service focused on roadmap development, programme structuring, sequencing, resource modelling, dependency management and benefits planning. Unless separately commissioned, it does not include programme execution, day-to-day project management, technical implementation, ERP, CRM or EAM deployment, data migration, software development or managed services.

This distinction enables the roadmap to remain independent and allows subsequent programme management, implementation and technical delivery support to be commissioned through an appropriate route.

14. Client responsibilities

- Provide timely access to relevant stakeholders and documentation
- Share existing strategies, plans, commitments and governance requirements
- Confirm strategic priorities, outcomes and decision authorities
- Participate in roadmap workshops and validation sessions
- Provide available budget, capacity and resource information
- Review and validate assumptions, sequencing and priorities
- Retain responsibility for approvals, funding and delivery decisions

15. Client outcomes

- Clear and agreed delivery priorities
- Realistic, sequenced and achievable programme plans
- Improved transformation and implementation readiness
- Better visibility of resources, dependencies and constraints
- Reduced programme and transition risk
- Stronger governance and executive oversight
- Improved stakeholder and partner alignment
- Clear links between activity, outcomes and benefits
- Greater confidence moving from strategy to implementation

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