# Service Definition: Mobilisation Coordination

## 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 Project Management and Governance service helps local authorities, mayoral combined authorities and wider public sector organisations establish effective oversight and control for complex change.

SOCITM Commercial provides proportionate project, programme and governance support for local government reform, devolution, shared services, ERP, CRM and EAM implementation, data legacy modernisation, cloud migration and digital transformation.

Using Agile, PRINCE2, MSP and hybrid approaches where appropriate, we connect plans, resources, risks, finances, dependencies, benefits and decisions to provide clear accountability and reliable delivery information.

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## 2. Who the service is for

The service is designed for public sector organisations that are:

- Managing local government reform or devolution
- Implementing ERP, CRM or EAM platforms
- Delivering data legacy migration or modernisation
- Establishing shared services
- Coordinating multi-supplier transformation
- Strengthening programme governance and assurance
- Recovering programmes with delivery challenges
- Improving benefits, risk and financial control

## 3. Challenges the service addresses

- Unclear accountability and decision rights
- Poor visibility of delivery performance
- ERP, CRM or EAM implementation risk
- Data legacy dependencies and migration risk
- Weak control of scope, resources and finances
- Fragmented supplier and workstream governance
- Benefits not connected to delivery activity
- Inconsistent reporting, assurance and escalation

## 4. Scope of the service

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

| Area | Examples |
|---|---|
| **Governance design** | Boards, forums, roles, terms of reference and escalation |
| **Integrated planning** | Workstreams, milestones, resources, dependencies and critical paths |
| **Business systems** | ERP, CRM and EAM implementation governance and controls |
| **Data legacy** | Migration, archival, quality, ownership and dependency governance |
| **Risk and assurance** | Risks, issues, assumptions, decisions and delivery confidence |

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| | |
|---|---|
| **Financial control** | Budgets, forecasts, change control and value for money |
| **Benefits** | Ownership, measures, dependencies and realisation tracking |
| **Reporting** | Dashboards, highlight reports, decisions and executive insight |
| | |

## 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 assess:** Confirm outcomes, maturity, constraints and governance needs.

**2. Design proportionate governance:** Establish roles, forums, controls and escalation routes.

**3. Integrate delivery plans:** Align ERP, CRM, EAM, data legacy and wider workstreams.

**4. Establish controls:** Implement risk, issue, change, finance and decision processes.

**5. Manage dependencies:** Coordinate suppliers, services, data and organisational change.

**6. Track outcomes and benefits:** Connect delivery progress with intended public value.

**7. Provide assurance and challenge:** Offer independent critical friend review and decision support.

**8. Transfer ownership:** Embed reusable tools, routines and internal capability.

## 6. Assessment and delivery framework

The framework is agreed with the client and may include:

- Strategic alignment and programme outcomes
- Governance and accountable decision-making
- ERP, CRM and EAM delivery control
- Data legacy migration and quality governance
- Integrated planning and dependency management
- Risk, issue and assurance management
- Financial and commercial control

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- Benefits and outcome measurement
- Supplier and stakeholder management
- Transparency, reporting and public accountability

## 7. Deliverables

Deliverables are tailored to the requirement and may include:

- Project or programme governance framework
- Integrated delivery plan and milestone map
- ERP, CRM and EAM governance controls
- Data legacy governance and migration controls
- RACI and decision-rights framework
- Risk, issue, assumption and decision registers
- Change control and configuration approach
- Financial and resource reporting framework
- Benefits realisation plan and tracker
- Executive dashboards and highlight reports
- Assurance and gateway review materials
- Reusable templates and governance handbook

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 |
|---|---|
| **Local government reform** | Coordinate transition, dependencies and accountable decisions. |
| **Devolution** | Govern multi-partner programmes and new responsibilities. |
| **ERP implementation** | Control scope, supplier, data, process and benefits delivery. |
| **CRM implementation** | Govern customer, channel, workflow and adoption workstreams. |
| **EAM implementation** | Coordinate asset, field, data and integration delivery. |

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|---|---|
| **Data legacy modernisation** | Govern quality, migration, archival, retention and retirement. |
| **Shared services** | Manage cross-authority plans, dependencies and benefits. |
| **Programme recovery** | Re-establish priorities, controls, reporting and confidence. |

## 9. Public sector standards and good practice

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

- PRINCE2, MSP, Agile and hybrid delivery principles
- Government Service Standard and GOV.UK Service Manual
- Technology Code of Practice
- Government business case and assurance principles
- NCSC security and cloud guidance
- Public sector commercial and supplier management requirements
- Data protection and information governance expectations

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

Project Management and Governance can be commissioned as advisory framework design, assurance or active delivery support. The precise boundary is agreed during mobilisation. Unless included in scope, it does not provide technical implementation, software development, system configuration, data migration execution, contract authority or managed services.

## 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

- Clear governance and accountable decision-making
- Improved ERP, CRM and EAM delivery confidence
- Stronger control of data legacy dependencies
- Better visibility of plans, risks and finances
- Earlier escalation and resolution of delivery issues
- Improved supplier and stakeholder alignment
- Clear links between delivery and benefits
- Reusable governance capability within client teams

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## Contact us

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