Service Definition: Engagement and Communication Planning

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 Enterprise Architecture service helps local authorities, mayoral combined authorities and wider public sector organisations align business, service, application, data, integration, technology and operating model decisions.

Acting as a trusted advisor and critical friend, SOCITM Commercial develops independent, vendor-agnostic current-state and target-state architecture supporting local government reform, devolution, shared services, ERP, CRM and EAM implementation, data legacy modernisation, cloud adoption and digital transformation.

We create coherent architectural blueprints, principles and transition pathways that improve interoperability, reduce duplication, manage technical debt and connect technology investment with service outcomes and public value.

2. Who the service is for

The service is designed for public sector organisations that are:

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- Planning local government reform or devolution
- Designing shared services or common platforms
- Implementing or replacing ERP, CRM or EAM
- Modernising legacy applications and data
- Developing cloud or digital strategies
- Rationalising complex application estates
- Improving integration and interoperability
- Establishing architecture governance and standards
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3. Challenges the service addresses

- Fragmented systems and duplicated capability
- Unclear ERP, CRM and EAM target architecture
- Legacy applications and data restricting change
- Complex point-to-point integrations
- Inconsistent standards and design decisions
- Poor visibility of dependencies and technical debt
- Supplier-led rather than outcome-led architecture
- Lack of an agreed transition architecture

4. Scope of the service

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

Area	Examples
Business architecture	Capabilities, services, processes, outcomes and operating models
Application architecture	ERP, CRM, EAM, line-of-business systems and rationalisation
Data architecture	Master data, customer data, asset data, legacy data and analytics
Integration architecture	APIs, events, interfaces, identity and interoperability
Technology architecture	Cloud, infrastructure, networks, platforms and end-user technology
Security architecture	Identity, access, resilience, privacy and assurance

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Transition architecture	Sequencing, dependencies, migration states and roadmaps
Architecture governance	Principles, standards, decision rights and assurance

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 outcomes, domains, stakeholders, governance and required artefacts.

2. Discover the current state: Map capabilities, ERP, CRM, EAM, applications, data, interfaces and infrastructure.

3. Define requirements and principles: Agree strategic, service, security, data and technology needs.

4. Develop target architecture: Create coherent business, application, data, integration and technology views.

5. Assess options and gaps: Compare current and target states, including legacy constraints.

6. Design transition states: Sequence ERP, CRM, EAM, data legacy and platform change.

7. Validate and assure: Test architecture with business, service, security and delivery stakeholders.

8. Recommend and roadmap: Provide priorities, governance and implementation considerations.

6. Assessment and delivery framework

The framework is agreed with the client and may include:

- Strategic and service alignment
- ERP, CRM and EAM capability fit
- Data legacy reduction and migration needs
- Open standards and interoperability
- Security, privacy and resilience
- Scalability and adaptability
- Whole-life cost and public value
- Portability and supplier independence
- Delivery feasibility and transition risk
- Sustainability and technical debt reduction

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7. Deliverables

Deliverables are tailored to the requirement and may include:

- Current-state architecture assessment
- Target enterprise architecture blueprint
- Business capability and service maps
- ERP, CRM and EAM architecture views
- Application portfolio and rationalisation recommendations
- Data legacy and transition architecture
- Data flow, integration and dependency models
- Technology and cloud architecture views
- Architecture principles and standards
- Transition states and implementation roadmap
- Architecture governance and assurance 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 use cases

Context	How the service can help
Local government reform	Design target architecture for new or 3odernizati authorities.
Mayoral combined authority	Align partner systems, data and regional capabilities.
ERP transformation	Define corporate systems, data and integration architecture.
CRM transformation	Create customer, channel, case and workflow architecture.
EAM transformation	Align asset data, systems, mobile working and integrations.
Data legacy 3odernization	Plan consolidation, migration, archiving and retirement.
Shared services	Design common capabilities, platforms and governance.

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Cloud adoption	Define target cloud architecture and transition pathways.

9. Public sector standards and good practice

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

- Technology Code of Practice
- Government Service Standard and GOV.UK Service Manual
- NCSC security and cloud guidance
- Data and AI Ethics Framework
- Government Data Quality Framework
- Open standards and interoperability principles
- Accessibility and inclusive design requirements

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.

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

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- 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

Enterprise Architecture is an advisory and design service. Unless separately commissioned, it does not include detailed solution build, software development, platform configuration, data migration execution, product licensing, procurement management 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

- Coherent target architecture aligned to service outcomes
- Clear ERP, CRM and EAM architectural direction
- Reduced duplication and technical debt
- Practical data legacy modernisation pathways
- Improved interoperability across systems and partners
- Stronger procurement and investment decisions
- Clear transition priorities and dependencies
- Sustainable architecture governance and internal capability

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Contact us

For further information about this service or to discuss your requirements, please contact:

Email: Hello@socitm.net
Website: www.socitm.net

Legal and publication details

SOCITM Commercial Ltd

Registered company number: 14547420

Registered office: 2 Shenley Grove, Stafford, ST17 9PT, United Kingdom

VAT number: 456 1707 86

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