Service Definition: Function and Service Optimisation Skills Training

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.

---

1. Service overview

Our Function and Service Optimisation Skills Training service builds practical internal capability across local authorities, mayoral combined authorities and wider public sector organisations.

The service develops the skills needed to optimise cloud platforms, ERP, CRM and EAM usage, digital services, operating processes and data legacy arrangements. Training is tailored to organisational priorities, roles, systems and transformation context.

By combining public sector scenarios, practical tools and reusable methods, we help teams improve value, performance, adoption, data quality, sustainability and continuous improvement while reducing unnecessary supplier dependency.

© 2026 SOCITM Commercial Ltd. All rights reserved

2. Who the service is for

The service is designed for public sector organisations that are:

- Seeking greater value from ERP, CRM or EAM investments
- Improving cloud cost and performance management
- Building continuous improvement capability
- Modernising or governing legacy data
- Preparing teams for local government reform
- Developing shared service capability
- Supporting system adoption and benefits realisation
- Reducing reliance on external optimisation support

3. Challenges the service addresses

- Under-used ERP, CRM or EAM functionality
- Inconsistent processes and workarounds
- Poor data quality and legacy data practices
- Limited cloud cost and performance visibility
- Skills gaps across operational and digital teams
- Weak ownership of benefits and optimisation
- Supplier dependency for routine improvements
- Lack of a repeatable improvement method

4. Scope of the service

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

Area	Examples
ERP optimisation	Process, configuration, reporting, controls and benefits
CRM optimisation	Customer data, case management, workflows and channel adoption
EAM optimisation	Asset data, lifecycle, work management and mobile use
Data legacy	Quality, classification, retention, archival and migration readiness
Cloud optimisation	Cost, performance, resilience, storage and sustainability

© 2026 SOCITM Commercial Ltd. All rights reserved

Service improvement	Process mapping, demand, waste and user outcomes
Continuous improvement	Measures, governance, backlogs and experimentation
Capability transfer	Role-based learning, coaching and reusable tools

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. **Assess learning needs:** Understand roles, systems, maturity and optimisation priorities.
2. **Define learning outcomes:** Agree practical capabilities and measures of success.
3. **Design tailored content:** Create role-based modules using client scenarios and systems.
4. **Deliver interactive learning:** Use workshops, exercises, demonstrations and case studies.
5. **Apply to live priorities:** Connect learning to ERP, CRM, EAM, cloud and data legacy needs.
6. **Support action planning:** Translate learning into realistic improvement backlogs.
7. **Evaluate learning:** Capture feedback, confidence and capability development.
8. **Embed reuse:** Provide materials and tools for ongoing internal use.

6. Assessment and delivery framework

The framework is agreed with the client and may include:

- Role and capability requirements
- ERP, CRM and EAM adoption maturity
- Data quality and legacy practices
- Cloud cost and performance management
- Process and service improvement
- Benefits ownership and measurement
- Accessibility and inclusive learning
- Knowledge transfer and internal reuse
- Sustainability and public value

© 2026 SOCITM Commercial Ltd. All rights reserved

- Continuous improvement governance

7. Deliverables

Deliverables are tailored to the requirement and may include:

- Training needs assessment
- Tailored learning plan and module design
- ERP, CRM and EAM optimisation modules
- Data legacy and data quality training
- Cloud cost and performance training
- Service improvement workshops
- Practical exercises and public sector case studies
- Optimisation checklists and templates
- Participant action plans
- Feedback and capability findings
- Reusable internal training pack
- Follow-up coaching or review options

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
ERP optimisation	Build skills to improve processes, controls, reporting and benefits.
CRM optimisation	Improve customer data, workflows, adoption and service outcomes.
EAM optimisation	Strengthen asset data, work management and lifecycle practices.
Data legacy modernisation	Build capability in quality, retention, archival and migration.
Cloud optimisation	Improve cost awareness, performance and sustainable use.
Local government reform	Prepare teams to standardise and improve new services.

© 2026 SOCITM Commercial Ltd. All rights reserved

Shared services	Develop common methods and cross-authority capability.
Continuous improvement	Embed repeatable service optimisation practices.

9. Public sector standards and good practice

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

- Government Service Standard and GOV.UK Service Manual
- Technology Code of Practice
- Government Digital and Data Profession Capability Framework
- Accessibility and inclusive learning requirements
- Data protection and information governance expectations
- Client learning, development and security 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.

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

© 2026 SOCITM Commercial Ltd. All rights reserved

- 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

This is a training and capability-building service. Unless separately commissioned, it does not include formal accreditation, production system configuration, data remediation, managed optimisation, platform administration or implementation delivery.

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 internal optimisation capability
- Greater value from ERP, CRM and EAM investments
- Better data legacy and quality practices
- Reduced avoidable cloud and system waste
- Improved service performance and adoption
- Stronger benefits ownership and measurement
- Reduced supplier dependency
- Sustainable continuous improvement capability

© 2026 SOCITM Commercial Ltd. All rights reserved

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

© 2026 SOCITM Commercial Ltd. All rights reserved.

© 2026 SOCITM Commercial Ltd. All rights reserved