Service Definition

Investment Platform Implementation & Transformation

1. Service overview

This service supports public sector bodies, non-departmental public bodies, charities and not-for-profit organisations, including LGPS pools, delivering investment platform implementation, transformation and associated business change initiatives, with a focus on operational resilience, transparency, Value for Money and sustainable service outcomes.

Strata provides delivery support across enterprise and private market investment platforms, including industry-standard solutions such as Aladdin and eFront, covering planning, sourcing, implementation, migration, remediation and integration with supporting data platforms.

Delivery includes the management of business change associated with platform implementation, including user engagement, training, user acceptance testing and adoption support.

The service is suitable for organisations undertaking new platform implementation, replacement of legacy systems, operating model change or post-implementation stabilisation, where secure delivery, strong governance and effective oversight are required.

2. Scope of the service

This service may include the following activities:

- Aladdin Risk and Aladdin Enterprise investment platform implementation
- Private markets platform implementation, including eFront
- Middle-office outsourcing support, including Aladdin and eFront providers
- Aladdin Accounting implementation
- Aladdin Data Cloud enablement, including Snowflake-based architectures
- Cloud data platform implementation supporting investment systems
- Migration from and decommissioning of legacy investment platforms
- eFront Back-to-Standard and Whole Portfolio Solution (WPS) implementation
- Platform configuration and end-to-end implementation
- Business change and stakeholder engagement support
- Change impact assessment and readiness planning
- User acceptance testing (UAT) coordination and support
- Training delivery and knowledge and skills transfer to client teams
- Cutover planning and post-go-live stabilisation support

Delivery planning, governance and implementation assurance
Services are delivered end-to-end or as targeted delivery support aligned to client governance and assurance requirements.

3. What is not included

This service does not include:

- Software licensing or resale of third-party platforms
- Acting as system owner or investment decision maker
- Ongoing managed service support unless separately contracted
- Legal, tax or regulatory advisory services
- Custody, fund administration or investment management services

4. Service delivery approach

Delivery is aligned to client governance, regulatory and assurance frameworks.

Engagements are typically delivered through structured phases, including mobilisation, design, build, testing, migration and go-live.

Delivery is informed by Strata's ongoing engagement with industry platforms, vendors and regulatory developments, enabling practical insight into emerging capabilities and evolving best practice to be reflected in delivery decisions where relevant.

Our delivery approach aligns with established public sector digital and service design principles, emphasising user-centricity, iterative learning and governance maturity consistent with Government Digital Service (GDS) expectations where relevant.

Strata works alongside client teams, vendors and third-party providers, providing delivery leadership, coordination and specialist implementation capability where required.

5. Service levels and support

Support during delivery is provided through agreed engagement models, including named delivery leads and structured governance forums.

Service levels, escalation paths and reporting arrangements are agreed at engagement initiation and documented within the delivery governance model.

6. Onboarding and offboarding

Onboarding includes mobilisation, confirmation of scope, governance setup, delivery planning, confirmation of delivery assumptions, stakeholder management and alignment.

Offboarding includes structured handover of deliverables, documentation, knowledge transfer and closure reporting aligned to client requirements.

7. Data protection and security

Strata operates in line with UK data protection legislation and client security requirements. Access to client data is limited to authorised personnel, supported by role-based access controls, audit logging and defined approval processes.

8. Dependencies and client responsibilities

Clients are responsible for:
- Providing timely access to stakeholders, systems and documentation
- Appointing accountable business and technical owners
- Making timely delivery decisions within agreed governance forums
- Ensuring vendor and third-party cooperation where applicable

9. Service constraints

This service provides implementation and transformation delivery support only.

Strata does not act as a software vendor or system owner. Final accountability for platform decisions remains with the contracting authority.

10. Exit management

At service completion, Strata supports a managed and controlled exit including:
- Handover of documentation and deliverables
- Knowledge transfer to client or third-party teams
- Support for transition to BAU or managed services where applicable.