



## Service Definition

# Investment Platform Optimisation & Ongoing Support

## 1. Service overview

This service supports public sector bodies, non-departmental public bodies, charities and not-for-profit organisations including LGPS pools optimising, stabilising and supporting investment platforms following implementation or major change, with a focus on operational resilience, transparency, Value for Money and sustainable service outcomes.

Strata provides post-implementation optimisation, remediation and ongoing support services across enterprise and private market investment platforms, including industry-standard solutions such as Aladdin, eFront and associated data platforms including Snowflake. The service focuses on improving operational efficiency, user adoption, platform performance and long-term sustainability.

Delivery includes the management of business change associated with investment platform optimisation and ongoing support.

The service is suitable for organisations requiring post-go-live support, remediation, optimisation or transition into steady-state operations across their investment technology landscape where secure delivery, strong governance and effective oversight are required.

## 2. Scope of the service

This service may include the following activities:

- Investment platform health checks and diagnostics
- Operational alpha and efficiency reviews (focusing on process efficiency, cost reduction and service performance improvements) and benchmarking where possible
- Cost efficiency assessments, user adoption, manual workflows vs business case
- Post-implementation stabilisation and support
- Post-go-live enhancement and continuous improvement
- Platform optimisation across enterprise and private market platforms
- BAU transition support and service handover planning
- Service performance monitoring and stabilisation post go-live
- Operational Risk review, including review of incidents, workflow and control assessments
- Managed services for Aladdin
- Managed services for eFront

Services may be delivered as time-bound optimisation engagements or as ongoing support and managed service arrangements.





### 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
- Custody, fund administration or investment management services
- Legal, tax or regulatory advisory services
- Platform implementation unless separately contracted

### 4. Service delivery approach

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

Engagements typically begin with assessment and prioritisation, followed by structured remediation, optimisation or support activities.

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 and platform vendors to resolve issues, implement enhancements and embed improved operational practices.

### 5. Service levels and support

Support is provided through agreed engagement models, including named technical leads and platform specialists.

Service scope, reporting arrangements and governance forums are agreed at mobilisation and aligned to client operational requirements.

### 6. Onboarding and offboarding

Onboarding includes scope confirmation, platform access setup, issue backlog review and governance alignment.

Offboarding includes structured handover, documentation, knowledge transfer and transition to client or third-party support teams.

### 7. Data protection and security

Strata operates in line with UK data protection legislation and client security requirements.

Access to client systems and data is restricted to authorised personnel and governed by defined access controls and audit processes.





## 8. Dependencies and client responsibilities

Clients are responsible for:

- Providing access to platforms, environments and documentation
- Prioritising remediation and optimisation activities
- Approving enhancements and operational changes
- Ensuring cooperation from platform vendors where required

## 9. Service constraints

This service provides optimisation, remediation and support services only.

Strata does not act as system owner or assume accountability for platform operations unless separately contracted.

## 10. Exit management

At service completion, Strata supports a managed and controlled exit including:

- Handover of documentation, configurations and knowledge
- Transition to BAU or alternative managed service arrangements
- Closure reporting aligned to client requirements

