

Welford SM

Welford Service Management (WSM)

Service Definition



ISO/IEC 27001:2022
Compliant

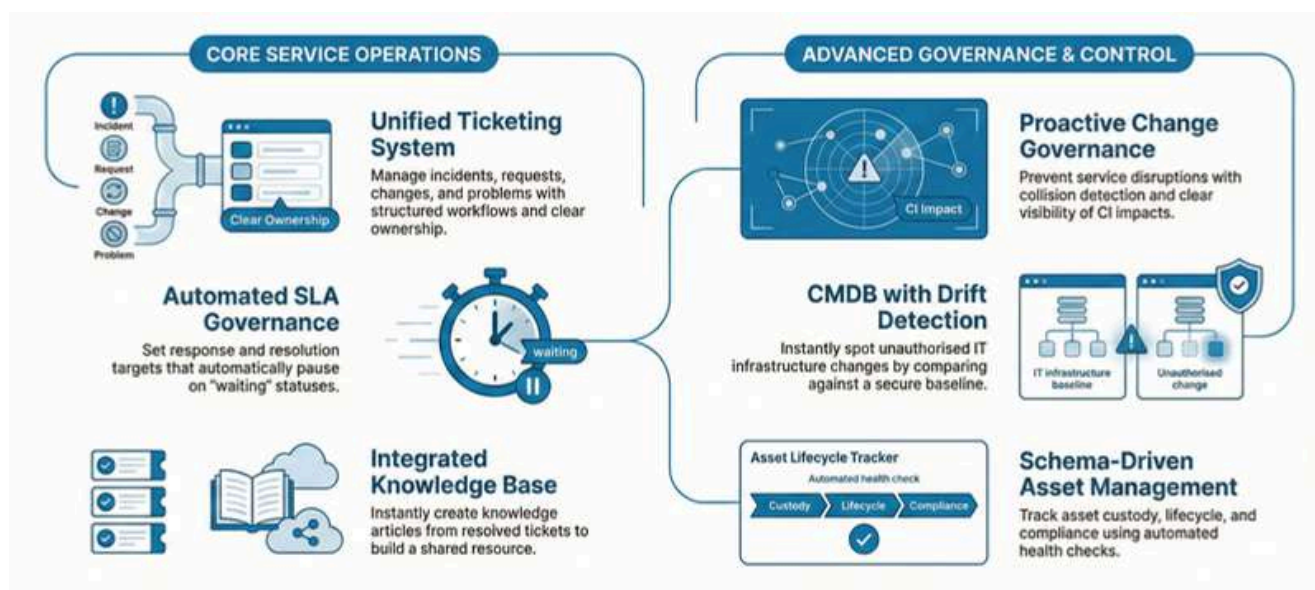
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1. Service summary

Welford WSM is an enterprise-grade Service Management platform that supports end-to-end IT service operations across incident, service request, change and problem management. It provides structured workflows, configurable approvals, SLA governance (response and resolution), notifications, automation rules and audit-ready activity timelines. WSM includes a CMDB-lite capability with CI relationships, baselines and drift detection to support change impact governance, and an Asset Management module with schema-driven asset types, custody history and compliance health checks.

WSM is designed to be practical to adopt: it supports portal-initiated ticketing as well as email ingestion, and can be extended with monitoring-event ingestion and external integrations. All key actions are recorded as evidence (who did what, when, and why) to support operational control, audit readiness and continuous improvement.



2. Intended audience and typical use cases

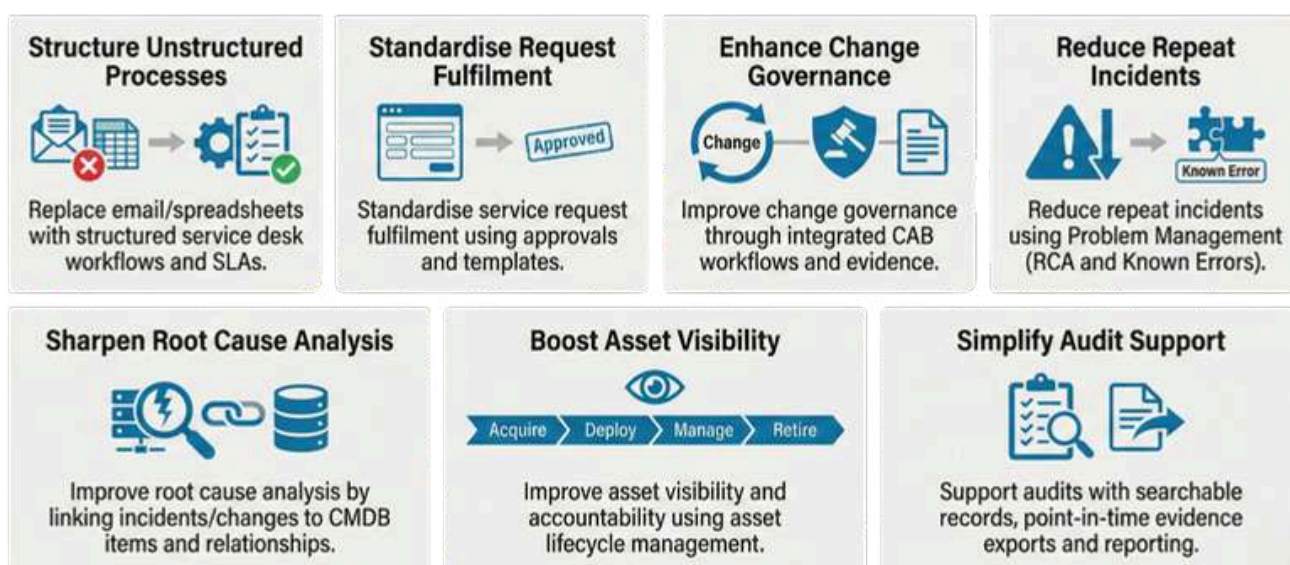
2.1. Intended audience

WSM is designed for organisations that want to improve service delivery and resilience with consistent workflows, accountability and evidence. It is suitable for:



2.2. Typical use cases

WSM supports common ITSM and operational governance scenarios, including:



3. Service scope and delivery model

3.1. SaaS delivery (Lot 2b – default)

WSM is delivered as a SaaS service accessed via supported web browsers and APIs over HTTPS (TLS 1.2+). Standard users do not need to install client software to use the web interface.

Tenant isolation: Each customer is provided a dedicated instance/tenant (and can be deployed with enhanced isolation options by agreement, e.g., dedicated environment/subscription), as confirmed in the Order Form/Call-Off Contract.



3.2. Integrations and automation (scope-dependent)

WSM can integrate with buyer environments and toolchains. Integration scope depends on:

- ✓ Target system capability (APIs/email integration)
- ✓ Buyer permissions and security policies
- ✓ Agreed onboarding scope and configuration



3.3. Optional buyer-controlled deployment (outside Lot 2b SaaS)



If required, WSM can be deployed into a buyer-controlled environment (private cloud/on-premises).

This option is agreed separately and is not part of the standard Lot 2b SaaS delivery.

3.4. Optional managed service (operational support)

WSM can be provided with an optional managed service to operate the platform day-to-day (administration, workflow updates, reporting packs, CAB support, and integration monitoring), reducing reliance on scarce specialist resources.



4. Functional capabilities

4.1 Service Desk and ITSM workflows



4.1.1 Incident management

WSM supports structured incident workflows for triage, assignment, escalation and resolution.



Ticket creation via portal and/or email ingestion



Categorisation, prioritisation and routing (rules-based where configured)



Assignment, escalation and SLA tracking



Comments, attachments and full ticket history/audit trail



Standard resolution templates and knowledge linkage (where configured)



4.1.2. Service request management and catalogue

WSM supports request fulfilment with consistent workflows and approvals.



Service catalogue items (configurable)



Request forms/fields and validation



Approvals and evidence capture for governed requests



Status tracking and requester communications



Repeatable fulfilment using templates and tasks (where configured)



4.1.3. SLA/OLA management and performance tracking

WSM provides service performance controls and reporting.



SLA/OLA definitions per service/category/priority (where configured)



Breach alerts and escalation workflows



Workload, backlog and SLA performance dashboards



Reporting for trend analysis and operational improvement

4.2 Change Management with integrated CAB



4.2.1 Change workflows

WSM supports change governance for controlled, auditable change execution.

-  Standard/normal/emergency change workflows (where configured)
-  Risk and impact capture (aligned to buyer governance model)
-  Approval routing and evidence capture
-  Implementation tasks, scheduling, and post-implementation review (where configured)



4.2.2. Integrated CAB

WSM supports CAB governance as part of the change workflow.

-  CAB membership/roles and approval steps (configurable)
-  CAB decision logging and evidence (approve/reject/conditions)
-  Change records linked to services, assets and CIs (where configured)
-  Audit-ready reporting for change governance

4.3 Problem Management



4.3.1 Problem lifecycle and root cause analysis

WSM supports investigation and prevention of recurring issues.

-  Problem records linked to related incidents/changes
-  Root cause analysis capture and evidence
-  Corrective actions/tasks tracking (where configured)



4.3.2 Known errors and knowledge linkage

WSM supports operational learning and repeat resolution.

-  Known Error records (where configured)
-  Workarounds and remediation guidance linked to tickets
-  Knowledge base linkage for consistent resolution

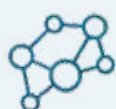
4.4 Integrated CMDB (Configuration Management)



4.4.1 Configuration items (CIs), ownership and attributes

WSM supports a CMDB-lite / CMDB capability depending on buyer scope.

- CI records with classification, environment, ownership, and attributes
- CI lifecycle status and history (where configured)
- CI linkages to incidents, problems and changes for traceability

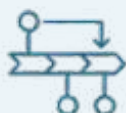


4.4.2 Relationships and impact visibility

WSM supports relationships to improve operational visibility.

- CI relationship modelling (where configured)
 - Change/incident records linked to impacted CIs
 - Improved impact understanding and root cause analysis
- Scope note:** Depth of CI relationship modelling depends on buyer requirements and onboarding configuration.

4.5 Asset Management



4.5.1 Asset lifecycle controls

WSM supports asset tracking and accountability.

- Asset register and ownership/assignment
- Lifecycle status, audit history and operational notes
- Link assets to tickets/changes for evidence and troubleshooting



4.5.2 Asset and CMDB alignment (where configured)

WSM supports operational learning and repeat resolution.

- Align assets and CIs to services/owners for governance reporting
- Support audits through searchable records and exports

4.6 Knowledge management

WSM includes knowledge features to reduce repeat work and improve consistency.

-  Knowledge base / documentation pages (where configured)
-  Link knowledge articles to tickets, problems and changes
-  Support operational SOPs and repeatable resolution processes



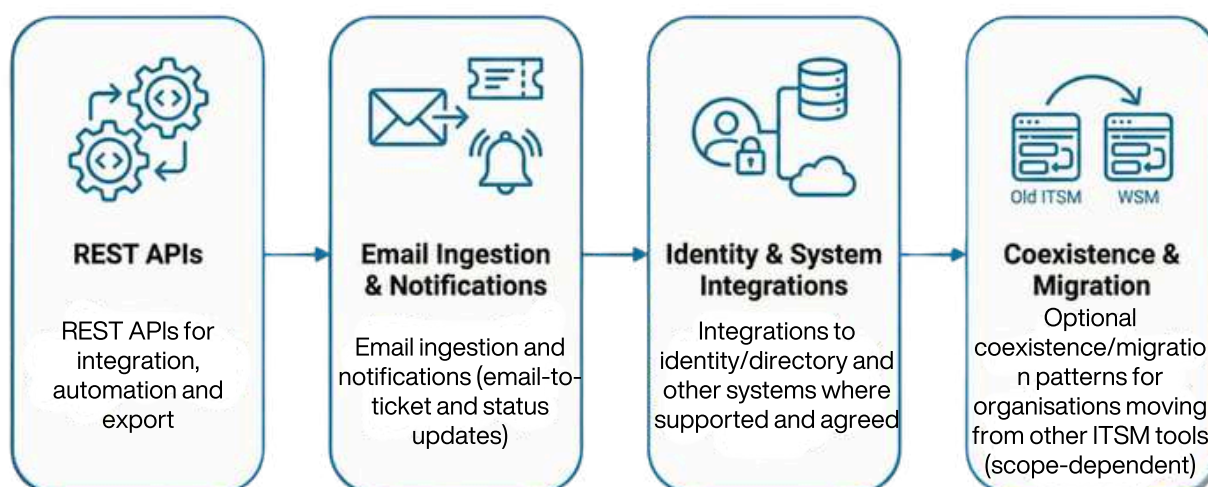
4.6.1 Reporting, audit and evidence

WSM is designed to provide operational reporting and audit-ready evidence.

-  Audit trails for requester actions, agent actions, approvals and admin changes
-  Dashboards for backlog, workload, SLA performance, and trends
-  Exports for audits and investigations (CSV/JSON; PDF reports where available)
-  Evidence linking approvals to fulfilment actions and outcomes

4.7 Integrations and APIs

WSM supports integration to reduce manual effort and align with enterprise toolchains.



5. Security and governance (high level)

WSM security controls are operated within the supplier's ISO/IEC 27001-certified ISMS, including:



Role-based access control (RBAC) and least privilege



Secure administrative access and separation of duties (where configured)



Logging and monitoring of security-relevant events



Vulnerability management and secure change control



Incident response procedures and post-incident corrective actions (CAPA)



Encryption in transit (TLS 1.2+) and protection of data at rest using cloud platform controls

6. Availability, resilience and maintenance (high level)

WSM is delivered on resilient cloud infrastructure designed to support continuity of service. We operate monitoring, backup and recovery procedures, and we communicate planned maintenance in advance where practicable. Availability targets and any remedies are agreed contractually.

- ✓ Resilient hosting with monitoring, backups and recovery procedures
- ✓ Planned maintenance notified in advance where practicable
- ✓ Higher availability/resilience options available by agreement (e.g., enhanced isolation/redundancy)

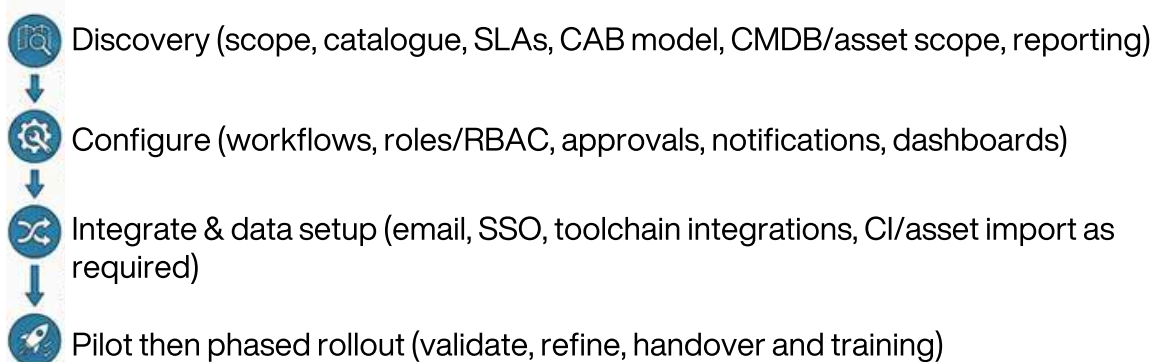
7. Service management and support

Support is provided through standard channels with optional enhanced coverage for buyers that require extended hours or priority phone response. Incident communications are structured to support operational assurance and audit requirements.

- ✓ Channels: ticketing/email (standard), phone for priority incidents (optional)
- ✓ Hours: UK business hours (standard); optional 08:00–20:00 weekdays and optional 24x7 P1 (scope-defined)
- ✓ Incident communications: updates during response and written closure report for significant incidents

8. Onboarding and adoption

Onboarding is delivered in phased steps to configure workflows, governance, CMDB/asset scope, and reporting, then validate in a pilot before rollout.



9. Implementation, consulting and managed service (optional)

Welford can deliver end-to-end implementation and, if required, operate WSM as a managed service to reduce reliance on specialist resources.

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- ✓ Project management, workflow/CAB model design, configuration and integrations
 - ✓ CMDB/asset modelling guidance and import support
 - ✓ Optional managed service: day-to-day administration, CAB support, reporting cadence, integration monitoring
 - ✓ Scope and pricing are agreed in the Order Form/Call-Off Contract (or commercial order for non-G-Cloud).
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10. Data handling, export and end-of-contract

WSM supports data portability through standard exports and a defined offboarding process.

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- ✓ Export via UI and/or API in CSV/JSON (PDF reports where available)
 - ✓ Optional final export package on request (supplier-assisted by agreement)
 - ✓ End of contract: export → disable access → secure deletion after export confirmation
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11. Constraints and buyer responsibilities

Some capabilities depend on buyer configuration choices and agreed scope; integrations depend on target system capability and buyer permissions.



- ✓ Constraints: SLA/CAB configuration, CMDB relationship depth, integration scope

- ✓ Buyer responsibilities: nominate admins/service owners, provide integration access/connectivity, agree operating model (SLAs/CAB/problem), provide timely approvals



12. Summary of differentiators

WSM combines an enterprise service desk with governance, evidence, and configuration context to support operational and cyber resilience.



ITSM Service Desk with structured workflows, SLAs and audit trails



Change Management with integrated CAB and evidence



Problem Management (RCA/Known Errors) to reduce repeat incidents



Integrated CMDB + Asset Management for traceability and impact visibility



Optional managed service to address skills/resource constraints (e.g., ServiceNow engineering gaps)



Dedicated tenant approach with optional enhanced isolation; optional buyer-controlled/on-prem deployment (outside Lot 2b SaaS scope)

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