Portfolio Management
G-Cloud 15

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1 Service Overview

Our Portfolio Management Service provides experienced project and programme managers with the core skills to provide services that support the centralised management of one or more portfolios, which includes identifying, prioritising, authorising and managing, the time, resources, skills, and budgets necessary to accomplish all interrelated tasks, as well as the confidence and communication capability to create a centralised visibility to help identify the fastest, cheapest, or most suitable approach to deliver projects and programs and other related work, to achieve specific strategic business objectives. Capgemini's service offering incorporates the design/review and mobilisation of robust portfolio management governance, processes and procedures including Cloud based projects and programmes.

2 Business Need

To support the management of Portfolios, creating a reliable system within which clients can consistently prioritise and manage their projects and programs:

- Ensuring that the overall schedule of approved projects is affordable and achievable from both a delivery and quality perspective.
- Prioritising resources to maximise outcomes.
- Minimising Risk across delivery, cost, and benefits realisation
- Maximising Benefits gained in the shortest reasonable timescales.

Providing clear and transparent visibility of portfolios to monitor and control programmes relating to:

- Programme Delivery
- Budget Management
- Risk & Issue Management
- Benefits management

As a result, enabling the following outcomes:

- programmes that deliver outcomes and measurable benefit.
- Achieving benefits of a portfolio of cloud service while keeping control.
- Portfolios that effectively manage competing priorities and related spend.
- Enabling accountability for client budgets.
- Manage the balance of resources v demands v risks quickly and effectively on a consistent basis.
- Manage dependencies on clients' programme plans across the portfolio.
- Engaging standard monitoring and control tools to provide a correct and comprehensive picture of programme resources, spend and budgets across the client's portfolio.

3 Our Approach

3.1.1 Portfolio Management Service Approach

The services provided will be aligned to the client's requirements and the services purchased. Typically, Capgemini would take a "top down" approach to deploying Portfolio Management services for a client. divided into three key stages:

- Portfolio Development
- Portfolio Review
- Portfolio Management

3.1.2 Portfolio Development

This stage is about setting / understanding the strategic objectives of the business, accordingly, developing a set of prioritisation criteria and using AI models to assess existing and planned projects and programmes across the portfolios of the business, and then actually assessing those projects and programmes to produce a client-prioritised schedule. The key steps are.

1. Determine objectives and design parameters.
2. Develop initial programme and project list.
3. Develop prioritisaton criteria.
4. Prioritise programmes and projects.

3.1.3 Portfolio Review

This stage covers reviewing the projects and programmes, incorporating a high-level re-estimation of both budget and resource estimates, culminating in an exercise with the client to consider the rationalisation of the prioritised projects and programmes both within and across all Portfolios. The key steps involved in this stage are.

1. Review good industry practices business model.
2. Update budget and resource estimates.
3. Reconcile top-down / bottom-up.
4. Rationalise programmes and projects.

3.1.4 Portfolio Management

This final stage covers the ongoing operational aspects to embed Portfolio Management.

The key steps involved are.

1. Develop on-going management process.
2. Provide tools and methods training.
3. Assess where AI can provide efficiency improvements

The ongoing customer Portfolio Management process will be agreed with each client and may include such areas as.

- Agreement of Portfolio Management Governance boards, meetings, etc.
- Setting roles and responsibilities.
- Embedding tools and processes.
- Embedding key reporting and metrics.
- Incorporating quality initiatives such as programme health checks, project audits etc.

Where portfolio management is already in operation the framework above can be used to rapidly review and evolve existing processes and portfolio structures and where AI can be used to make improvements .

3.1.5 Benefits

The benefits of implementing the Portfolio Management service will depend on the services purchased and may include some or all the following.

- Create an effective process across a clients' business to enable it to assess and prioritise all prospective new projects and programmes so that the client can ensure that.
  - Benefit is gained in the shortest reasonable timescales.
  - The overall schedule of approved projects is collectively affordable.
  - The overall schedule of approved projects is achievable from a delivery and quality perspective.
  - Assurance that all customer programmes are focussed on delivering benefit (that is measurable).
  - Effective client management of competing priorities and uncontrolled spending.
  - Clear client accountability for all programme budgets.
  - Creates a clear view of performance and risks across the whole client programme delivery landscape.
  - Effective client management of performance and risk across the whole programme delivery landscape.
  - The effective client balancing of resource v demand v risk for all projects and programmes within the portfolio.
  - Enabling clients to manage their programme plans "across the board" through all changes.
  - Enabling clients to form an accurate and comprehensive picture of their programme resources, spend and budgets.
  - The service supports and helps to enable Capgemini's Cloud offerings.

4 Buyer Responsibilities

Please refer to the Supplier Terms listed with this service on the Platform. These may contain additional Buyer obligations/costs the Buyer is subject to that are not identified anywhere else in the Supplier's Application or on the Platform.

If these responsibilities do not match your expectations, then please contact us in order that we can explore options to vary our approach.

5 Service Management

This service can be delivered as a defined project, with agreed processes, outputs, and deliverables, or on a day rate basis.

6 Protection of Data

This service is based on a security classification of 'Official', however should you have a requirement for a different security classification that you would like us to consider, please contact us to discuss.

7 On-boarding and Off-boarding

Prior to the execution of the Order, the Supplier and the Buyer will agree the scope of the

exit plan for the Services and a timescale for delivering an exit plan to ensure continuity of service.

Capgemini shall undertake on-boarding and off-boarding activities agreed within the Order Form and an exit plan in line with the Call-Off Contract terms which will be charged for in accordance with the Pricing section for this service.

8 Skills and Knowledge Transfer

Capgemini recognises that skills and knowledge transfer is a critical element in the provision of G Cloud services to public sector clients. Where possible and applicable, this forms part of the delivery plan for the service agreed at the start of the engagement. Our consultants and engineers are experienced in providing skills and knowledge transfer for major private and public sector clients.

Where appropriate, we may use a standard approach, tailored to topic, skills-gap and individual, to ensure consistency and effectiveness. The approach, Capgemini's Assess-Plan-Implement framework, has been used repeatedly by our teams to structure the work involved in transferring skills and creating new teams capable of driving and sustaining change long after the end of the formal programme. The framework can be applied throughout a project to understand knowledge transfer objectives, plan training delivery methods and materials, and deliver and evaluate success.

9 Partnerships/Alliances

This section is intentionally left blank.

10 Vendor Accreditations/Awards

2025 WORLD'S MOST ETHICAL COMPANIES® ETHISPHERE 13-TIME HONOREE

For the 13th year in a row, Capgemini has been recognised as one of the World's Most Ethical Companies® by the Ethisphere® Institute. This is an acknowledgement of our ethical culture that makes us an employer of choice and responsible player in the eyes of our clients, shareholders, and the wider community.

Programme Leadership Accreditation

Aligned with the Project Management Body of Knowledge (PMBoK®), ISO, and Prince2, Capgemini has its own Certification for project professionals which assesses a person's competencies by reviewing their delivery experience, formal training completed, and validating the skills acquired to date.

Sustainability, Diversity, and Inclusion Awards

- CDP A List recognition - Global environmental impact non-profit CDP again positioned us in its leadership tier for our approach to climate change in 2022.
- 2023 Ecovadis Platinum Rating - We maintained a platinum rating, recognising us as a responsible and sustainable business in the top 1% of companies assessed.
- Bloomberg Gender-Equality Index - We were recognised for our commitment to supporting gender diversity with a position in the 2023 Bloomberg Gender-Equality Index.
- Ranked 2nd in the inclusive top 50 UK employers 2022/23 list.
- Great Place to Work - We were certified as a Great Place to Work® in 2023, reflecting our employees' experience of working at Capgemini in the UK.
- UK Best Workplaces for Women – In 2023, we were listed as a Best Workplace for Women by Great Place to Work®. This listing is based on responses from our team to an anonymous survey about their employee experience.

- UK Best Workplaces for Wellbeing – In 2023, we are also listed by Great Place to Work® as a Best Workplace for Wellbeing.
- Defence Employer Recognition Scheme – In 2023, we were recognised by the Armed Forces Covenant with Gold in their Defence Employer Recognition Scheme, for our commitment to supporting veterans and reservists.
- edie Awards 2023 - We won edie's Social Sustainability, Diversity & Inclusion Award in 2023, for our work with CodeYourFuture to offer socially excluded individuals' access to tech careers.
- Better Society Awards - Our collaboration with CodeYourFuture to offer digital skills training won a Better Society Award in 2022. The awards celebrate efforts by commercial organisations to create a better society.
- Stonewall Silver Global Employer – In 2022, we were rated with Silver Global Employer status by Stonewall, reflecting Capgemini UK's acceptance without exception for everyone who identifies as LGBT+.
- Social Mobility Top 75 Employer Index - Capgemini UK was listed in Social Mobility Foundation's 2022 ranking of the top 75 UK employers that have taken the most action to improve social mobility in the workplace.
- Supporting Returners - Capgemini UK was shortlisted in WM People's 2022 Top Employer Awards as an employer that has demonstrated stand-out initiatives to support individuals returning to the workplace after a career break.
- Disability Confident certified - We hold a Disability Confident Employer Badge, which recognises our commitment to supporting team members with disabilities.

11 Sub-contractors

Capgemini UK may use the following subcontractors to deliver this service:

- Capgemini Technology Services India Limited.

12 Business Continuity and Disaster Recovery

No disaster recovery plan is provided as part of these Services.

13 Pricing

This service is priced in accordance with the SFIA Rate Card attached. Capgemini can also provide offshore resources at reduced rates where appropriate. Projects can be priced either on a Time & Materials or Fixed Price basis.

All prices are in GBP and exclude VAT.

14 Ordering and Invoicing

Please refer to the Supplier Terms for this service.

We would be pleased to arrange a call or meeting to discuss your requirements of our service in more detail.

15 Termination Terms

Please refer to the Supplier Terms for this service.

16 Further Information

For more information about this or any of our G-Cloud services, please contact our Public Sector Team.

Phone: 0370 904 4858

Email: publicsector.opps.uk@capgemini.com including the following information:

1. The name of this service.
2. The name of your organisation.
3. Your name and contact details.
4. A brief description of your business situation.
5. Your preferred timescales for starting the work.

About Capgemini

Capgemini is a global business and technology transformation partner, helping organizations to accelerate their dual transition to a digital and sustainable world, while creating tangible impact for enterprises and society. It is a responsible and diverse group of 340,000 team members in more than 50 countries. With its strong over 55-year heritage, Capgemini is trusted by its clients to unlock the value of technology to address the entire breadth of their business needs. It delivers end-to-end services and solutions leveraging strengths from strategy and design to engineering, all fueled by its market leading capabilities in AI, generative AI, cloud and data, combined with its deep industry expertise and partner ecosystem. The Group reported 2024 global revenues of €22.1 billion.

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