

Portfolio management for cloud-based digital services

Portfolio management helps maximise return on investment in cloud-based digital technology and strategic change by effectively managing and prioritising the work portfolio. We introduce streamlined processes to objectively evaluate changes against user needs and desired innovation, to assess the risks and benefits across the portfolio before investment and execution.

Portfolio management is recommended for any public sector organisation about to embark on cloud technology adoption and usage, or looking to improve their current internal capability and competency to meet government Digital by Default service standards in the management of their transition to cloud-based services.

Equal Experts applies solid product and lean thinking to portfolio management. Strong governance of budget, technology and people is required for the successful incubation of ideas and innovation, and a high level of autonomy is established once a project is underway. We set clear expectations on governance, outcomes, periodic reporting and financial control.

We can either augment an existing team with specific skills and expertise on a co-sourced basis or take full responsibility for establishing and running the capability to manage the portfolio of investments.

Features

- Ensures that delivery is high quality and fit for purpose
- Guides teams on their use of appropriate delivery practices
- Helps teams grow as required, through planning capacity
- Ensures teams are ready to take live users on board
- Helps teams conduct appropriate levels of testing and validation
- Ensures a consistent, timely and open flow of communication
- Ensures that useful metrics are captured and distributed
- Helps teams produce and update estimates for key milestones
- Helps teams identify and resolve dependencies
- Provides an escalation point for the swift resolution of issues

Benefits

- Provides delivery teams with the required space and resources
- Guides teams on their use of organisational processes
- Helps teams grow through developing/maintaining a resource pipeline
- Manages supplier relationships for resources and products
- Works with teams and stakeholders to ensure effective communication
- Ensures useful metrics are captured and distributed appropriately
- Works with teams and wider organisation to streamline release processes
- Helps teams identify and resolve dependencies
- Provides an escalation point for the swift resolution of issues

Our approach to portfolio management

Our consultants are all highly experienced in the modern software delivery practices required for the successful delivery of high-quality digital products and services that meet the real needs of users. Our collaborative approach is also highly effective in transferring knowledge of new ways of working to team members to help build internal competency and capability in this area.

Our approach allows teams a high level of control over team structure, stakeholder engagement and delivery approaches, with strong governance on outcomes and internal reporting. It is underpinned by clear principles about value, fit for purpose, security and execution planning (i.e. how to exit from the investment planning or incubation phase).

We believe this provides our customers with the ability to effectively manage project initiation, and the ability to scale to support many projects without becoming exposed to too many risks in terms of funding, technology or individual project failures.

Our approach comprises four key phases in our portfolio management funnel:

1. Opportunities and challenges
2. Project definition/team formation
3. Test and validate
4. Implementation planning

Opportunities and challenges

The top of the funnel is where opportunities and challenges for investigation are identified between the primary groups of stakeholders, including technology and business strategy. This involves input from a broad range of stakeholders across the customer organisation, including strategy people, R&D engineers & tech people, product people, users and SMEs.

The output will be a short document with a statement of the problem or vision, some context, key SMEs, and stakeholders, and some sense of relative priority and the technical value delivered. The steering group then meets to decide on which of these make it through to the next stage of project definition.

Project definition

The project definition phase must establish the key outcomes for the project as it moves through the portfolio management funnel. Consensus with stakeholders is crucial to ensure successful incubation. Desired deliverables, expressed in terms of business outcomes, should be listed. What questions do we want to answer? What would we need to know to proceed to the next phase?

An experienced product owner will prove useful to work with stakeholders and SMEs to help define these. An effort must be made to ensure that measures for these outcomes are identified that can be used to show project viability. The question will be asked in the implementation planning phase as to whether or not to proceed. It must be clear from the outset what indicators will be used to determine the answer to this question. Failure to do so will result in projects that continue without a clear focus or direction, and which will almost certainly consume vast resources for little (if any) outcome.

Test and validate

In this phase, a small team will address the questions posed in the project definition phase. We favour an approach backed up by evidence. Through quantitative and qualitative research, product owners/business analysts, user researchers and interaction designers can define requirements and answer questions posed in the project definition phase.

Some of the questions will be technical in nature, and having experienced software developers and architects with broad industry experience will enable an evaluation of the market and emerging technology trends. Wherever possible, working prototypes that prove the technical correctness of both the solution and the proposed build process/tooling will be encouraged.

The project team is expected to report back to the steering board regularly, updating on progress, discovery and risks to the investment.

Implementation planning

This phase addresses the end of incubation and preparing for further approval of investment to move to implementation. This might include recommendations to stop investigations, early discussions with potential delivery partners and seeding of implementation teams, key technical and procurement issues, and any other concerns or opportunities.

Outputs from portfolio management, and the implementation planning phase in particular, are expected to feed into the architecture and technology strategy, and the strategic vision and scoping for delivery that inform the business case and decision-making as to whether to proceed to Implementation. Inception techniques, e.g. epic level backlogs and effort estimation, team composition and release planning, may be called on during the implementation planning process (and portfolio management as a whole) to various degrees of detail.

We work with our customers to agree on the level of fidelity required when establishing an execution path for the successful and agreed incubated opportunity/challenge - this is likely to vary depending on project specifics such as perceived complexity and risk.

The level of detail required in implementation planning artefacts is generally lower than is typical for Inception artefacts. Even so, there is still likely to be a period of detailed investigation and analysis of product scope required of any delivery team as it moves into Implementation.

Governance

A key to successful innovation and investment is the right level of governance. This should be sufficient to ensure that strategic, hard challenges are addressed by the portfolio management approach, since simpler problems can be addressed locally. It should also have high expectations in terms of deadlines, budget and appropriate solutions. In exchange, it should offer teams significant autonomy, protection from interference and access to the right stakeholders and people networks.

Governance should also include lightweight PMO functions to ensure budgets are managed correctly, and projects do not languish for want of the correct financial, procurement or HR support.

Examples of portfolio management in action

Equal Experts has helped a number of our client organisations, such as Telefónica/O2 and HMRC, to establish and run effective portfolio management processes. We provided a proven means to capture, qualify, evaluate, prioritise and allocate project ideas within the delivery and investment portfolio.

As well as using responsible innovation techniques to safely introduce new technologies (e.g. NoSQL datastores), we have helped to drive ongoing prioritisation of the pipeline of work, managed in partnership with our customers' delivery leadership, and often including representatives from multiple delivery partners. The process provides a way to improve the flow of work through delivery and optimise innovation and the business value delivered.

Our portfolio management service has helped to define and agree the overall workflow – stages, the inputs and outputs for each stage, and decision and assessment/evaluation criteria to push ideas through the stages (or discard them).

Our goals for portfolio management assignments are typically to:

- provide context for project execution;
- force the emergence of a project vision, and to enable the sharing of that vision;
- mitigate technical and organisational risk, through cross-referenced verification and validation;
- provide a baseline of assumptions and assertions at project inception for progress tracking and project performance review.

Services

We have four core UK-based teams that provide expertise and advice to the organisation, our clients and our partners:

Data and AI

The Data and AI service helps clients make better use of data and create powerful AI solutions that improve and transform any business. We use our deep expertise in data engineering to improve the quality of data that flows through the organisation, providing better insights into customers and operations. Applying our expertise in MLOps, Generative AI, AI in the SDLC and algorithms, we help upskill client teams, automate key services and create new ones.

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Design and Product

The Design and Product service helps clients increase adoption and user satisfaction by designing exceptional digital products and services. We use our expertise in user-centred design and product management to discover and solve the most valuable problems, aligned to a client's digital strategy. We help to create delightful customer experiences that deliver real business value, increased user engagement, better brand reputation and additional revenue.

Technology Strategy

Our Technical Strategy service helps teams to confidently navigate the technology landscape and make decisions that will sustain long-term value. Our expertise covers all aspects of technology strategy, including architectural choices, operating model changes and the adoption of emerging technologies. Using our extensive industry and technology experience, we help to plan the practical steps clients need to be ready for the future.

Modernisation and Platforms

Our Modernisation and Platforms service helps to accelerate time-to-value and reduce total cost of ownership, while scaling digital products and systems. Using modern engineering practices, we help to build and run cloud-native services and improve heritage systems. We bring deep expertise in cloud architectures, secure delivery, "you build it, you run it", and platform engineering on AWS, Azure and GCP clouds.

Team

Our core culture and business model prioritise providing value and doing what is best for all our stakeholders, particularly our clients, rather than maximising short-term profits and shareholder returns. Our founders sold the business to an Employee-Owned Trust (EOT) in May 2024 to secure the long-term future of our collaborative approach, highlighting this commitment. The EOT trustees include the founders and representatives of our employees, Associates and clients, ensuring the interests of all stakeholders are considered and balanced in our operations.

Equal Experts is a worldwide network of technology experts who are dedicated to driving innovation. We have Business Units in the UK (London and Manchester), USA, South Africa, Germany, the Netherlands, Australia and India. Our resourcing model is based on a core of permanent senior consultants and a supply chain of 4,000+ carefully selected, expert, independent SME consultants - our Associate network. On a typical engagement,

we pass ~£2 in every £3 of our contract income directly to this network, creating opportunities for entrepreneurship and helping new SMEs to grow.

90% of our consultants have more than 12 years of experience (average more than 18 years) in the development, delivery, operation and maintenance of digital services using agile methods. Many have significantly more and, in some cases, are global influencers, authors and presenters. Their maturity and pragmatism mean they are highly collaborative, happy to transfer knowledge and keen to help clients build internal capability.

We have grown organically, mostly through personal referrals, prioritising quality, experience and cultural fit above all else. After a rigorous selection process, experts are added to our network, whether we need them immediately or in the future.

We select the most suitable people for any contract role from this large pool, not just from a bench of off-charge employees. Our model is resilient and efficient; we form small expert teams, reducing cost and risk for our clients, while achieving outcomes faster than less experienced teams. Our experts train and upskill the whole supply chain, including client staff and those of other suppliers. We have delivered many public and private sector systems (e.g., for HMRC, HMPO, Defra, DWP and MoJ), including CNI, over the past 17+ years using this model. Our approach is data-driven, user-focused and sustainable, allowing us to deliver results quickly and efficiently, using small teams of real experts.

Our standard working model for teams is hybrid remote/on-site, with a core generally based close to client offices, minimising travel costs and environmental impact. This ensures they can be on-site for workshops, meetings and onboarding activities, and can work collaboratively with client team members, stakeholders and other suppliers. In the words of one client, *“your consultants truly leave their Equal Experts badges at the door”*.

Our focus on senior talent means that all our consultants have the skills and experience required to thrive in dynamic, challenging client environments. It means we can focus on work that adds real value, rather than micro-managing more junior consultants. Our non-hierarchical structure also allows us to operate with lower overheads. For our teams, this creates a mature, pragmatic and innovative working environment, where they can implement the best solutions of their already distinguished careers. And for our clients, it translates to better services, delivered faster and at lower overall cost. We were ranked 2nd in Glassdoor’s UK Best Places to Work 2025, up from 4th in 2024, and 15th in Newsweek’s Most Loved Workplaces 2022.

For more information and case studies, please visit <https://www.equalexperts.com/> or contact us at solutions@equalexperts.com.

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Roles

Collectively, our consultants have the multi-disciplinary experience and expertise needed for successful transformation to cloud-first delivery, live service maintenance and new operating models. Our network gives us fast and flexible access to the DDaT skills our clients need. We have specialists in all areas required for digital success, including:

- Delivery managers
- Change managers
- Product managers
- Engagement managers
- Strategic advisors
- Security specialists
- Data scientists
- Data engineers
- Data architects
- Technical leads
- Technical architects
- DevOps consultants
- Developers
- Testers
- Business and performance analysts
- Accessibility experts
- Service designers
- User experience designers
- Content designers
- User researchers

When a client needs specialists or niche skills, we can rapidly and confidently engage with other organisations in our established ecosystem of proven partners. EE interviews each partner consultant to ensure a high level of knowledge and cultural fit before we assign them to clients.

Public sector clients

We're proud to be one of the top suppliers to the public sector via the G-Cloud and DOS frameworks. Our services are also available through RM6190 Technology Services 4, RM6195 Big Data and Analytics (the only supplier on all 6 capabilities), RM6335 DALAS (Lot 2a) and DPS Frameworks including RM3764 Cyber Security 3, RM6173 Automation

Marketplace, RM6094 Spark, RM6200 Artificial Intelligence and RM6235 Space-Enabled and Geospatial Services.

The Equal Experts approach has a successful track record of delivery across the private and public sectors. Some recent award-winning deliveries include:

- HMPO's passport renewal service,
 - ranked #1 public service with a score of 81.2/100 in the July 2025 ICS customer satisfaction survey.
 - Winner of Public Sector Project of the Year and Development Team of the Year at the UK IT Industry Awards 2024.
- HMRC's Data Platform Services Core Engineering Platform, winners of Computing DevOps Excellence Awards 2025 Best Implementation of DevSecOps.
- John Lewis & Partners Best Implementation of DevSecOps at the DevOps Excellence Industry Awards 2023

We know what it takes to implement and support cloud-based applications within complex public sector organisations and across large multi-vendor programmes. We understand and adhere to the GDS digital service standards for delivering solutions and handling and securing data within critical national systems. We have experience in consulting, deploying and supporting security-accredited solutions and have passed numerous GDS assessments. Many of our consultants hold current SC clearance (some have DV) as they have previously worked with public sector clients.

Equal Experts has helped implement digital services to government digital service standards (including passing many formal GDS service standard assessments) for:

- His Majesty's Revenue and Customs (HMRC)
- Department for Environment, Food & Rural Affairs (DEFRA)
- The Home Office and His Majesty's Passport Office (HMPO)
- Ministry of Justice (MoJ), His Majesty's Prisons and Probations Service (HMPPS) and His Majesty's Courts and Tribunals Service (HMCTS)
- Department for Work and Pensions (DWP)
- Department of Health and Social Care (DHSC)
- Department for Business, Energy & Industrial Strategy (BEIS)
- Border Force
- Department for Education (DfE)
- Registers of Scotland
- Office for National Statistics (ONS)
- Intellectual Property Office (IPO)
- States of Guernsey

- Cabinet Office
- Government Digital Service (GDS)
- Valuation Office Agency (VOA)

Planning

To build detailed knowledge of the context and domain for any project, an initial phase of planning, definition and knowledge transfer will generally take place at the start of an engagement.

We have found that this takes place most effectively through a short time-bound inception to develop a shared understanding and agreement on vision and objectives across a broad stakeholder group. This covers the business, technical and user aspects of the project and the outputs may include user personas and scenarios, key user journeys, as-is and desired business processes, a prioritised backlog of user stories, technical constraints and vision, and a release roadmap and plan. The techniques and principles applied are also used on an ongoing basis throughout the course of delivery, to ensure the solutions developed are fit for purpose and meet real and changing user needs.

This initial inception phase can be contracted separately if required.

Setup and migration

In addition to ongoing development and operation of live cloud-based services, we can help with the initial set up and migration as part of a transition to cloud. We look for opportunities to automate processes (for example, test, deploy) that will yield real benefit and high ROI. Our approach helps to address integration, dependencies and risk early. We capture actionable metrics to measure and manage progress towards meeting the agreed success criteria and KPIs identified for building and operating the service. The highly collaborative, interactive processes we follow foster continual learning and improvement of services. They help to establish and evolve the overarching service design, management processes and the team capabilities.

We can ensure projects hit the ground running through our experience in designing, configuring and setup of many continuous delivery and automated cloud deployment environments. These techniques allow software to be repeatably and reliably deployed and tested through each stage into production on the cloud. We have substantial experience when it comes to the tooling required for continuous delivery and automated software deployment, greatly facilitating the software set up, build and migration process, which increases programme productivity and reduces project risk and cost.

Quality assurance and performance testing

We hold ISO9001:2015 Quality Management System certification. All our consultants have extensive experience in both manual and automated testing, including performance testing, continuous integration and delivery into production environments at scale. With all clients, we actively encourage the adoption of robust and meaningful automated test coverage, delivery and test techniques, to reduce risk and safely increase delivery velocity. We are happy to work with a client's existing quality management system (QMS) where appropriate.

Security services

We hold ISO27001:2022 Information Security Management System, Cyber Essentials and Cyber Essentials Plus certifications.

We can provide the following security services if required:

- Security strategy
- Security risk management
- Security design
- Security incident management
- Security audit services

Training

For every client, we aim to transfer and embed knowledge of technology and process innovation. Our consultants have the expertise, skills and enthusiasm to help transfer knowledge of new technologies and ways of working to our clients' team members, upskilling staff and helping to build their internal delivery competence and capability. This improves internal competencies and builds long-term sustainable capability, as clients migrate to modern cloud-based products and services. We tailor particular practices to address specific organisational constraints – we recognise that every organisation is different and there is no “one size to fit all”.

We tend not to offer classroom-based training as our consultants are happy to share their knowledge throughout a project. They take responsibility for helping individual client team members adopt new practices and ways of working.

Ongoing support

Our operational philosophy is “you build it, you run it”. The delivery team responsible for the development of a live service usually also takes responsibility for its operation. We have found that development teams which support their own products are motivated to deliver higher quality, more robust and maintainable code.

When a service is live with real users, we expect the delivery team to provide 2nd line (infrastructure, in conjunction with hosting support agreements) and 3rd line (applications) support during business hours. We can agree on an appropriate model for 24/7 on-call coverage if required - see our G-Cloud On-Call Support offering for details. We typically establish an on-call rota with delivery team members assigned weekly.

Our experience is that digital services are never really finished and that it is important to retain some level of investment to allow the addition of new features as the needs of customers (both internal and external) change. Our design of the end-to-end service can include establishing Service Level Agreements for ongoing service evolution and operational support (ensuring agreed levels of service availability).

User support

We provide an engagement manager on all G-Cloud engagements with responsibility for ensuring clients objectives are met and for addressing any issues with service delivery. Our engagement managers act as an escalation point and can be reached via phone or email to respond to issues beyond the control of the team providing the service. Engagement management is included within our service pricing.

When a service is live with real users, we expect the delivery team to provide 2nd-line (infrastructure, in conjunction with hosting support agreements) and 3rd-line (applications) support during business hours, within the agreed service cost. We can agree on an appropriate model for 24/7 on-call coverage if required - see our G-Cloud On-Call Support offering for details. We typically establish an on-call rota with delivery team members assigned weekly.

Social Value, the Environment and CSR

Our values and ethos extend beyond our organisation and people, and we take our corporate social responsibility seriously. We are committed to working with all our clients to share our knowledge and learnings, and contribute to their CSR goals, e.g. we will

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facilitate discussions with their designated digital sustainability leads, to collaborate on environmental policy goals, discuss current practices for greening software and agree enhancements aligned with industry policies, like the Greening Government Strategy.

We willingly collaborate closely with our clients, other suppliers, competitors and the wider ecosystem to discuss, share and test innovative environmental and social value ideas and initiatives, to improve sustainable practices and create added value throughout any contract.

We will follow our proven social value methodologies for any G-Cloud 15 contract, aligned with the UK's Public Services (Social Value) Act 2012, PPN002 (PA2023) and the Social Value Model, and the UN Sustainable Development Goals, to actively create additional opportunities to develop, measure and improve social value for our client and their entire supply chain. In a recent [Government Transformation Magazine interview](#), Mike Potter, ex-UK Gov CDO recalled his HMRC experience partnering with us for transformative results. *"We didn't just buy their capability - we bought their culture,"* he said. *"Cultural alignment is key. When you pick partners who share your values and ways of working, you find areas of mutual advantage."*

We review, update and publish our Carbon Reduction Plan, Modern Slavery and EDI statements annually, are a Disability Confident employer, a member of the Business Disability Forum and a participant in the Government Digital Sustainability Alliance (GDSA). Our commitment to providing a fulfilling workplace for everyone is reflected in Glassdoor's Best Places to Work in the UK, voted for by our staff, ranking us 4th in 2024, 2nd in 2025.

We complete the [EcoVadis](#) assessment tool, which evaluates performance across four dimensions: Environment, Labour and Human Rights, Ethics and Sustainable Procurement. We complete the assessment, create an improvement plan and review and update it annually. We willingly share the results with clients and use their feedback and learnings to influence our improvement plans.

Examples of other social value initiatives for clients include:

HMRC Joint Value Initiatives: we work closely with HMRC to organise and fund JVs, e.g.:

- [School visits](#) to encourage children to pursue STEM careers & find future data engineers,
- Data Engineering Academy - supporting HMRC to onboard and upskill new starters and develop their technical expertise through bootcamps and placements on EE projects,

- Hosting the [Women in Tech & Leadership Conference 2025](#) in collaboration with HMRC's Women in Tech Network.

Hace: We co-funded a [project](#) to develop an AI-based data analysis tool to objectively quantify a company's Child Labour performance.

Médecins Sans Frontières (MSF): We staffed a pro bono project to build the [Malaria Anticipation Project \(MAP\)](#), deployed in Lankien, South Sudan and being planned for Anka, Nigeria.

John Lewis: We shifted to lower-footprint GCP cloud data centres in Switzerland to meet JL's environmental sustainability goals.

Government: We are an active member of the Government Digital Sustainability Alliance ([See more details here](#)) and are actively working with Defra to implement exemplar projects such as:

- Implementing Green coding Standards ([See Version 1 Github](#)) in our teams working with Defra to help support learnings for wider Government.
- Working with Defra and our partner [Heata](#) to develop an innovative decentralised cloud compute project. The aim is to reduce the carbon footprint of cloud workloads by 80% and heat farmers' domestic water tanks to save them money.