

Inception for cloud-based digital services

Inception is a pre-delivery phase to support a successful transition to the cloud by aligning a diverse stakeholder group on vision, objectives, scope and the plan for digital products and services. We investigate business, security, policy and performance requirements, explore technical, process and integration risks, and clarify user needs.

Inception is recommended for any public sector organisation embarking on cloud technology adoption and usage, with the consequent need to deploy new cloud-based digital products and services as part of managing their transition.

Inception is designed for organisations seeking to kickstart a new programme of work as part of their transition, and looking to start off on the best foot – with a fully informed, capable and motivated delivery team. In establishing answers to challenging questions early on, it helps to de-risk delivery – and ensure that what is being built is really what is required.

Our teams have in-depth, hands-on experience and expertise in utilising mature, proven analysis, engagement, facilitation and alignment techniques. They employ these across relevant areas to help establish the criteria for success of the service and meet the Government Digital Service standards in delivery. These techniques include:

- objective and goal setting
- business and process modelling
- stakeholder mapping and engagement
- requirements elicitation and analysis
- scope definition and prioritisation
- service and user experience design
- in-depth analysis of policies and laws

Features

- Lean process, designed to deliver high-quality outcomes within weeks
- Small multi-disciplinary team of experienced senior consultants
- Highly collaborative with diverse stakeholder involvement from business to IT
- Identifies business rationale, project vision, objectives, KPIs and business-case validation
- Outlines high-level solution design via lean, actionable artefacts
- Facilitates early technical discovery

- Identifies key project risks, dependencies and assumptions
- Determines scope and initial prioritised backlog (master story list)
- Defines delivery approach, mobilisation and team set up
- Formulates initial release plan with milestones and high-level estimates

Benefits

- Provides high-quality, actionable outcomes
- Safeguards ROI by validating business case assumptions at earliest stage
- De-risks through early risk analysis and technical feasibility assessments
- Allows informed decision-making via lean upfront analysis and planning
- High degree of alignment across diverse set of project stakeholders
- Improves dependency management across client and third-party organisations
- Improves gateway compliance and governance
- Increases business value through active prioritisation of product backlog
- Provides solid foundations for subsequent project delivery
- Helps compliance with Government Digital Service Digital by Default standards

Our approach to inception

Inception at Equal Experts is a short (but intense) timeboxed period of analysis, planning and preparation. The aim is to develop the shared understanding and agreement required to confidently move into the implementation of a cloud-based digital service. Inception forms the basis of a detailed, lean (“just enough”) analysis and planning exercise, with the express goal of facilitating an effective start and execution of the next phase.

This service offering is ideally placed to help public sector organisations meet Government Digital Service standards. Inception activities build on initial high-level research, analysis and planning activities, but drill down to the next level of detail in order to enable delivery.

With Inception, the intent is not to plan every element of an entire implementation (or even discuss detailed scope, beyond specific, tangible delivery deadlines). Rather, we aim to understand the items that are important for the next stage, as well as high-risk items that could become a problem later. We do this by looking at the problem space in terms of:

- **Breadth:** We ‘paint’ the as-is and to-be domain in broad brushstrokes across business, user, process and technology. We focus on desirability (are we doing the right thing), feasibility (can we solve the problem and what is the best way) and viability (does this meet business goals).

- Depth: Based on the broad understanding and insights gained, we prioritise high-value, high-risk items and focus on these with further analysis. Normally, this covers a mix of key features, technical areas and process aspects that we believe will benefit from further attention.

Our goal is to have sufficient information at the end of Inception to manage the next stage successfully and be able to communicate this easily within and outside the team. While it is a key goal to create solid foundations and address risks early, it is also a goal to avoid engaging in activities that, in time, will prove to be irrelevant or that close options too early in the process.

Inception is led by a multi-disciplinary core team – with roles typically including delivery management, technical leadership/architecture, user experience design and research, and business analysis.

The specific client stakeholders whose involvement is required for Inception are determined once we have full visibility of the client product and organisation structure, but we aim to drive this out in advance of the Inception to ensure effective participation by stakeholder groups. The client roles we typically like to have involved are:

- Stakeholders and project/programme managers
- Product owners/managers or other SMEs
- Existing delivery team members (BA, Dev, QA)
- Existing operations (both business operations and technical operations)
- Product specific people (policy, commercial, sales teams, account managers)
- Internal users or user experts (Help Desk/support staff/trainers)

The analysis tasks that take place tend to fall into one of the following categories:

- Workshops and wide discussion groups
- Presentations/briefings/demos/knowledge share from the client to the Inception team
- “Tear downs” of documentation, existing systems, code artefacts and data
- Small group interviews, to drill down into the outputs from the above sessions
- Consolidation sessions (with just the Inception team)

Alongside these analysis tasks, the team may also start doing some technical bootstrapping:

- Ensure access, account provisioning, etc, are all set up and that the process is documented for future new joiners
- Create source control repositories, set up continuous integration, build monitors, demo environments, etc, if required
- Depending on time, start implementing a “Walking Skeleton” – a ‘feature-free’ thread of technology from end to end that provides the basis for all future stories (“adding meat to the bones”!)

Outcomes of inception

We typically expect to produce some or all of the following deliverables during Inception:

- A shared understanding of the service, its vision, mission objectives and goals
- A high-level view of the feasibility of the team being able to address the specific business goals within the given project constraints
- List of key issues, assumptions, risks and dependencies
- Highlighting of any data/areas that we think are required but not currently available or sufficiently clear
- User personas and scenarios
- Visualisation of the overall as-is and to-be user experience and solution, be this via experience maps, visuals or wireframes
- A prioritised list of the broad themes or epics within the problem space, often visualised as a project roadmap
- A proposed first theme to tackle, and within that, prioritised backlog for the first iteration, with detailed stories for the first sprint
- A clear understanding of the technical estate/landscape. Where applicable and valuable, as-is and to-be architecture models. This would include migration, transition and decommissioning concerns and approaches.
- A documented route to release
- An understanding of what the day to day team working model/process will look like
- What the roles and responsibilities are
- Understanding system constraints and non-functional requirements (scale, security, SLAs, etc.)
- A curated set of collateral collected and insights generated during the Inception period (e.g. a project wiki) for subsequent alignment and communication.
- Project plan and estimate, recommended next steps.

Examples of inception in action

When a global leader in industrial publishing came to Equal Experts, we recommended a project inception to ensure both the client and our delivery team fully understood each other's approach, the business drivers of the project, and the business domain.

The inception was held over two weeks and involved all critical stakeholders and subject matter experts. We began at the high level, fully understood the business case for the project and the external drivers before diving into more in-depth sessions. After this, both sides had all the information they needed to start working (having used the learnings to sketch a working plan).

Inception is not about providing full knowledge of every detail that will be required for the whole project. It gives the delivery team just enough to get started, to explore concepts and technical approaches, with the same understanding and expectations between the client organisation and Equal Experts.

It can be a flexible process; in this instance, the first week was held at the client's headquarters in London, followed by a week of in-depth activities with their technical and product teams in Memphis, USA.

The single biggest factor underlying project problems is an incomplete or inaccurate understanding on either or both sides of the client-supplier relationship. Project inception avoids this by setting the tone for the open, frank, and goal-oriented communication that successful projects are built on.

One of the approaches we employed in this particular Inception was to discuss the problem and the solution separately – after all, only by having a thorough understanding and definition of the problem can an effective solution be designed.

The following is a snapshot of how this inception was run:

- Day 1 - Introductions to the management team and descriptions of high-level approaches. Covering ways of working, logistics and practicalities, roles and responsibilities, high-level project timelines, and a discussion of the business problem and existing products
- Day 2 - The domain firehose - the client is asked to present as much as possible about the business domain. Product demos, market information, competitor

analysis... a wealth of information to saturate the EE team in the business problem, their customers, terminology, and teams.

- Day 3 - Constraints - understand the limits of the problem and solution domains - broken into sessions focusing on diverse aspects such as: PMO processes, technical delivery, product and user experience.
- Day 4 - Impact Mapping - this workshop allows us to map the entire chain of value, capturing how all project activities support the central goal (which supports the business case for the project). This informs the overall shape of the project, aligns the team and stakeholders, and allows for effective prioritisation. The outcome of the session is a map capturing the why, who, how, and what of the project – demonstrating how all the activities will contribute to the overall goal of the business, and aligning expectations across EE and the client.
- Day 5 - Consolidation, technical exploration, discussion of characteristics, features and discriminators of the product.
- Day 6 - A recap; introductions to the product team, ways of working, etc. as on Day 1
- Day 7 - Dives into existing tech infrastructure, data, content, and processes - mapping and capturing constraints – broken into sessions covering the top three products - two today, one tomorrow.
- Day 8 - AM: Third product dive. PM: Service mapping - choosing one representative user and one key product journey, a User Journey Map was created, capturing the activities of the user, the features of the product, and the key 'back office' service processes supporting them.
- Day 9 - AM: Service mapping continued. PM: Service map used to drive the first few sprints of backlog user stories, and a first draft of a sprint planning map.
- Day 10 - Consolidation, discussion, Q&A, and wrap-up.

Following this, the outcomes of the entire two weeks were played back in a presentation to the client, including senior stakeholders.

That's inception: a 'just enough' fact-finding mission that puts us, and our client's project, in the best possible starting place.

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.

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.

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

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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 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.

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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.