

Cloud services for health providers (NHS), digitally enabled care & better patient outcomes

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Introduction

At Clarasys we call ourselves the Experience Consultancy, and since our founding in 2011, we have focused on delivering high-value, end-to-end experiences that put people at the centre. We have cross-capability, cross-industry expertise that includes extensive work in customer and employee experience transformation, people and change management, sustainability consulting, service design, process improvement consulting, business and technology transformations, data governance and driving digital adoption. We are deep experts in public sector work with demonstrable experience across a breadth of service areas, cloud-based applications, and project roles including launching citizen-facing services, delivering on our client's most complex policy initiatives, leading organisations' transformations to increase efficiency, and introducing new ways of working whilst upskilling civil servants teams in parallel.

We have 10+ years' experience and have filled 1,000+ projects, programmes, and product engagement roles across an array of government departments, agencies and public bodies including the Home Office, the Department for Transport, the Ministry of Justice (including His Majesty's Courts and Tribunals Service and His Majesty's Prison and Probation Service), the Department for Business and Trade and the Department of Health and Social Care (including NHS, the UK Health Security Agency, and Public Health England). Clarasys is proud that over 40% of the work we did in 2025 was in the public sector. We are deeply experienced working with Home Affairs and Justice functions in particular, with 60+ consultants having worked with the Home Office since 2021, and 50+ working with the Ministry of Justice since 2016. Across our suite of UK government engagements, we have earned a 100% positive customer satisfaction, leading to a total government net promoter score of 93%.

In addition to our government experience, Clarasys brings a wealth of expertise and insights from our work within multiple private sector industries, including Healthcare, Financial & Professional Services, Retail, Media & Information Services, as well as our extensive track record delivering for not-for-profit organisations.

We embed Agile approaches into everything we do, partnering with you to deliver sustainable solutions and rapid delivery of value. Our teams prioritise people-centric approaches and testing with real users, analyse problems in the context in which they occur, avoid standardised, one-size fits all answers, and prioritise customer and employee experiences in our approach. Above all, we are highly collaborative in our approach. Our chief aim is to empower our clients for sustained success without us, beyond just the timeline of our engagement.

As an employee-owned business, Clarasys prides itself on doing business differently. We do not have sales targets, instead we focus on prioritising the health and wellbeing of our employees, clients and teams we work with. We pride ourselves on continually seeking and responding to client and employee feedback, in order to deliver the best value, rather

than the most profit. We champion Diversity, Equity, and Inclusion in our work and in our culture, an approach which was recognised in the 2023 British Diversity Awards.

Our work, people, and organisational culture have all been recently recognised by leading business awards and rankings. Clarasys has been voted gold in one category (Public and Social Sector), silver in two categories, and bronze in eleven additional categories listed in the Financial Times UK Leading Management Consultants 2025 report. In 2022 and 2024, we were ranked high in the Sunday Times “Best Places to Work”. We were also voted as the one of the Best Mid-Sized Company to Work For in London and in the UK.

Service Overview

Clarasys provides award-winning patient experience services across the healthcare ecosystem (NHS & Foundation Trusts, health departments and public bodies). We deliver better patient and staff outcomes, improved workforce efficiency alongside enhanced citizen-facing services. We apply user-centred design, NHS service standard (including agile) and innovative methods (AI tools, co-design/co-production).

Key propositions

- Target Operating Model
- Service Design
- Product Management
- Programme/Project Management
- User Research
- Digital Transformation
- Business Case Development
- Change Management, Training, Communications & Engagement
- Business Process Improvement
- Delivery Management
- Data Governance
- Portfolio Management
- Patient and Clinician Experience

Target Operating Model

Our industry-leading Operating Model design, build and implementation approach enables better civil servants experiences, drives greater departmental benefits and efficiencies alongside delivering excellent citizen-facing services.

At Clarasys we have extensive experience in supporting public sector organisations to design, test, and implement new operating models. Our projects span from bringing online consultations onto the NHS app, digitising antenatal and newborn screening journeys, working with health trusts to achieve operational efficiencies and meet Key Performance Indicators (KPIs), setting up new public-facing services and redesigning organisation-wide operating models. We understand the complexities facing public sector organisations who want to transform their operating model and have experience in managing challenging budget pressures, compliance and legal constraints, in particular where unions need to be engaged and the civil service recruitment process.

As the Corporate Rebels UK partner (a group dedicated to making workplaces innovative and forward thinking), we have experience helping organisations move towards more progressive ways of working, whilst also improving their culture which leads to increased innovation and higher employee satisfaction.

Our approach

Our industry-leading Target Operating Model (TOM) design and implementation approach, is informed by 10+ years of experience and 50+ engagements supporting design, build, implementation and successful adoption of new models and ways of working across health and social care (including NHS Trusts, health providers), central government, not-for-profit, and private sectors.

We know that no two organisations are the same. So we will always take time to understand clients' specific goals and timelines, and tailor our approach to meet their unique needs.

Our **Target Operating Model design approach** consists of 6 key steps:

- 1. Rapid assessment of the current state:** Our as-is assessment phase is where we will identify the current challenges with your existing operating model (if any), the root causes of those challenges. This will create a set of problem statements that we will use to co-design and develop areas of opportunity to improve the organisation. We will apply a user-centred lens to understand how you compare to other leading government organisations from the UK, globally and from the private sector including healthcare providers.

At a UK organisation specialising in international culture and education opportunities, we collected data from over 100+ countries within weeks of starting to do a rapid maturity assessment of their current operating model. This meant we could focus on to-be discussions much quicker, and ensured the new TOM addressed the root causes of their current challenges. It also ensured we got engagement from front line teams from the very beginning, and they were bought into the need to change.

- 2. Identifying the target state vision & outcomes you want to achieve:** Either building off your existing strategy, or helping to define your target vision first through co-design workshops, we will align the areas of opportunity (opportunity statements) identified in the as-is analysis to your future vision. We will also clarify the target benefits from the new TOM, and the metrics to measure these. These are typically focused on cost reduction, agility, end-user experience, and employee experience targets.

At the National Society for the Prevention of Cruelty to Children (NSPCC) we ran a series of design workshops, with a cross-section of the leadership team and frontline staff, to create the new vision for their child services department. We then identified the desired benefits and associated KPIs the new TOM needed to deliver. This prioritised our focus for the next phase, and identified the areas they needed to change most from their current state.

- 3. Creating, testing & iterating high-level design options:** After identifying the areas of opportunity (opportunity statements), we will co-design high-level options for a target operating model across the foundational pillars of people-culture, process-governance, technology-data. These options will articulate how the Target Operating Model solves the problem statements identified. We will do this through a rapid design sprint with leadership, and roadshows with frontline staff to ensure buy-in.

At St John's Ambulance, this approach enabled the steering committee to make an informed decision on the direction of the TOM, without waiting a long time for a detailed business case to be created. This was crucial in getting senior stakeholders bought into the transformation early in the project.

- 4. Detailed to-be design & impact assessment on the chosen option:** Once we have worked closely with you to agree the high-level direction of the TOM, we will do more detailed design across the following operating model areas; organisational design, process management, technology and data, governance structures, performance metrics, and sourcing and locations. Our co-design approach ensures that both employee and end-user feedback is heard, resulting in the proposed way forward being based on the needs and experiences of those who will directly interact with the new operating model. It is also key to agree on what level of detail is needed in this phase, versus the implementation phase post-business case.

At an organisation specialising in international cultural and educational, we created a redesigned organisation structure with enough detail for a rigorous and compelling business case, and we achieved quicker results by deciding to define new job descriptions after the business case. We shaped our approach by analysing the organisation structure and then answering the most critical questions and demonstrating value early, such as the fundamental structural challenges with the potential to delay the development of their strategy. As such this meant the British Council was able to secure funding earlier to redesign their organisation structure.

5. Cost benefits analysis and roadmapping how you transition to your target state:
As we start to get greater detail of the design, we will work with your teams to identify the following;

- a. The cost versus benefits of making the changes over your business case period
- b. The change readiness of the organisation and employees for the changes
- c. The time it will take to make certain changes and transition to the target state
- d. The technical complexity of associated technology changes
- e. What other changes are going on in the organisation which could impact this

We will then co-create an agile implementation roadmap that details the sequences of the implementation and key dependencies. We will focus on the areas that bring the biggest organisation and end-user experience benefits first and areas that have the least impact to change afterward.

His Majesty's Prison and Probation Service (HMPPS) Electronic Monitoring service, sought to move from an outsourced operating model to a tower based operating model. We created the to-be TOM which enabled them to hit their objectives of replacing existing technology, introducing new capabilities and building a scalable platform to support future capabilities.

6. Making the case for change via a business case & setting you up for success:
Using our extensive experience of using the Five Case Model to deliver a strategic outline case, outline business case and full business cases, we will work with your teams to create a robust and engaging business case. Creating a core working group to provide rapid feedback on iterations, and engaging key stakeholders from Commercial and HR early is key to ensuring you get sign-off first time.

For His Majesty's Prison and Probation Services (HMPPS), we supported large high profile business case creations for national services such as the Electronic Monitoring programme and Commissioned Rehabilitative Services. HMPPS benefited from our support, submitting successful business cases in an area of

significant ministerial interest. These critical programs benefited from Clarasys' agile approach to business case development and understanding of success factors, as well as the methodological rigour needed to prove viability, benefit, and return on investment.

Running in parallel, and underpinning our operating model approach is our industry-leading change management approach. Our team will create an overarching change and communications strategy, tailored to the needs of specific teams and individuals, which will form a key part of the implementation roadmap.

Case Study

St John's Ambulance brought us in to help design and build a new front office operating model to break down traditional silos. They envisioned it improving their healthcare go to market approach, the customer experience they deliver and to enable operational efficiency.

To better understand their challenges, we undertook a deep dive into their current ways of working including a maturity assessment against their marketing, sales, service, fundraising and customer experience capabilities. This identified a set of pain points and high priority opportunities which informed the target operating model design. We then facilitated a series of design workshops to define a new organisation and capability structure. Through detailed working sessions the team then defined new roles and responsibilities, process architecture, a Responsible Accountable Consulted and Informed (RACI) matrix, governance forums, high level technology, data requirements and outsourcing needs. In parallel, the team calculated and developed a business case and a 12 month implementation roadmap. This was supported by a change impact assessment, a change approach and comms plan.

As a result of our work, the client successfully integrated new ways of working across the front office and fundraising teams. This enabled a coordinated go to market approach, improved quality and timeliness in the design and delivery of customer and donor experiences. Cost of operations was lowered by ~20% as a result of reduced duplication of activities across the business and increased opportunities to generate revenue by maximising capability and capacity of the sales team.

Service Design

We shape the service experience citizens want by innovating on their current pain points and challenges and designing targeted user-centric solutions that deliver value quickly and sustainably.

Clarasys are the 'Experience Consultancy' and we see Service Design being at the heart of effective 'experience design'. Our tried and tested approach has been used for over 100 engagements, including 14 central government departments such as His Majesty's Prison and Probation Services (HMPPS), National Health Service and the Home Office. Our experience spans enabling operational enhancements to existing services, re-procuring a service, and creating a new service in response to a change in law and government initiatives. Clarasys will work with you to scope and shape solutions across varying Service Design needs.

Our repeatable approach can be used for:

- Providing a team to lead the creation and delivery of a Service Design (such as designing a service for procurement)
- Providing Service Designers as part of a multidisciplinary team (such as iteratively building a citizen-facing digital service)

Our expertise links policy, strategy, technology, and people to deliver innovative and exceptional citizen-facing services. Our purpose led approach ensures an innovative lens is applied to all aspects of the service, such as sustainability, taking circular economy principles into consideration to create social value as well as user value.

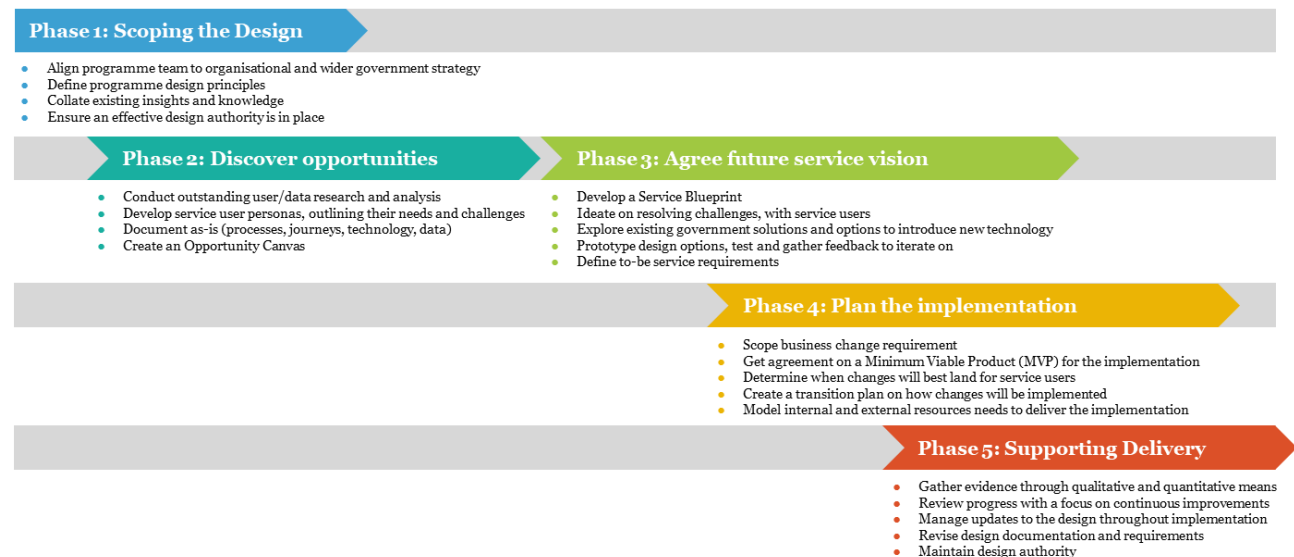
Our Service Design combines principles from various disciplines, including Design Thinking, User-Centred Design, Systems Thinking, co-design (also referred to as co-production) and User Experience (UX) to design cloud-enabled solutions that are efficient and effective whilst focusing on the user. We follow the NHS Digital service manual and leverage these techniques to design and deliver accessible services in line with the NHS Design System both in terms of digital accessibility (e.g. Web Content Accessibility Guidelines 2.2 compliant) and ensuring that services are accessible to the people that will benefit from them most. Working through Agile practices we will determine service improvement opportunities, prioritise and innovate, and then design for feasible service outcomes.

We can provide you with a Service Design roadmap with design artefacts that allows you to smoothly enact the transformation yourself and to do so, we recommend having Service Design representation within any implementation. User needs will be constantly evolving so design decisions will need refining within implementation, and Service Designers are best placed to holistically appraise and shape those changes.

Our approach

We break our approach to Service Design into five phases as seen in Figure 1:

Figure 1: Our approach to service design



1. Scoping the Design

The first phase of Service Design will be to understand your organisation's strategic vision, any overarching government initiatives (NHS Long Term Plan, Department of Health and Social Care), and look to align the programme team on the aims and objectives for the service. This supports the utilisation of appropriate design principles (NHS Design Principles) to ensure consistency in the programme.

Prior to carrying out any user engagement and detailed discovery, we rapidly understand what insights and knowledge already exists that can help tailor the focus areas for the upcoming **“Discover opportunities”** phase. We take a pragmatic approach and gather inputs for the design from engaging project sponsors, reviewing existing reports, and interviewing key stakeholders. Using these inputs, we can gauge what work has already taken place, what works well today and what can be improved. We will assess the maturity of these inputs to design and quickly identify where additional analysis will be required during discovery (see phase 2. Discovery opportunities). Having reviewed existing documentation and understanding your needs, we will develop the service design plan. This will outline the service design methodologies which will best suit your needs, often encompassing a mixed methodology approach utilising both qualitative and quantitative means.

We ensure the right level of governance to capture key decisions and drive visibility across multiple stakeholders and product teams. We will set the programme up to

clearly document decisions and empower Service Owners and Product teams to set design direction. Where more assurance is required, we will input into design authorities (setting up where necessary) to build consensus and drive transparency amongst diverse stakeholder groups and to gather input around business and technical directions. We recommend a cross-functional group involving policy, front line staff (nurses, clinicians, staff operating in different care settings), digital, representatives from operational areas, leadership and wider health ecosystem to get broad exposure and inputs to design.

At a Government Healthcare Department, there was a need to manage the changing digital expectations of participants and staff for digital screening. We analysed existing collateral to set a baseline level of insight to run a Discovery from. We identified and established an empowered stakeholder group made of commissioners, senior leadership and technical experts in the maternity space to give quick and effective direction as we moved into design.

2. Discover opportunities

To understand how a service can be improved or optimally deployed we start by developing a full understanding of the service users (e.g. Patients, Clinicians) and their needs. To understand users, we apply aspects of user-centred design and citizen experience techniques to quickly understand their needs, motivations and pain points and get a holistic view of the key outcomes they wish to achieve. To do this we will create personas of common groups to best represent them in design considerations. We will conduct additional user research and data analysis to add to your existing knowledge and documentation for these persona cohorts. We will map their service journey and experience, highlighting the moments that matter, knowledge gaps, and pain points with the service. We will understand the current state of service delivery including existing processes, technology and data involved using a mixture of workshops, interviews and shadowing techniques. We apply this information into innovative tools that can quickly map as-is and to-be states (such as Business Optix, a dynamic business capability modelling tool) showing the interrelationship of capabilities, processes, people, systems and data to help us generate early value through defining, visualising and assessing service journeys in a collaborative way.

We then apply a Design Thinking methodology to the persona groups to understand their true needs and the challenges the current service has in meeting them. We will outline your true service challenges through an Opportunity Canvas that helps walk through solution ideas, potential setbacks, strategies, challenges, and metrics. We will run Design Thinking workshops to review the Opportunity Canvas, to socialise ideas, gather feedback and agree priorities.

At NHS Trace we engaged user research teams to ensure a national service would be fit for purpose and meet user needs. We captured findings in a user story map to outline their problems and iteratively improve the service in an

agile way. Improvement options were presented and prioritised with development teams. This included alignment of existing separate services into one universal offering, leading to improved all round experiences for citizens with shorter digital journeys and increased access to vital products in the effort against Covid.

3. Agree the future state vision

We will begin to outline the type of service that you want to deliver and create a high level service blueprint. This provides a clear view of the main building blocks for the service, helping to articulate it clearly, and associate where service challenges and potential solutions exist.

Taking the defined opportunity we will ideate with your service users around resolving their challenges. We will take time to understand if there are existing solutions out there in government that could, fully or in part, fulfil our identified users' needs either through existing capability or through some element of augmentation. We will look across product registers, architectural roadmaps, and wider design authorities for visibility of such solutions. If there is an inability to leverage existing products/services, we will explore creating new services/products with an onus on adhering to the NHS service standards including making services that are clinically safe, interoperable, and support a culture of care. We will design utilising key NHS technologies (NHS login, Personal Demographics Service) as appropriate for the service.

Working in multidisciplinary teams, we will prototype what design options could look like, testing design impacts with users, gathering feedback to iterate from, and delivering business requirements addressing pain points, needs and desired outcomes. We can adopt innovative approaches that we have tested with our private sector clients such as the development of a digital twin to model system and resource impacts of certain operational and process changes.

Our approach to capturing and managing requirements across the design lifecycle is consistent with The Open Group Architecture Framework (TOGAF) and BCS Chartered Institute for IT practices and includes: gathering requirements; analysing requirements; and maintaining requirements. Through continuous engagement with agreed stakeholders and an agreed requirements taxonomy, our teams will deduplicate and check for feasibility, validating with business representatives.

We map the proposed service improvements by creating a to-be service blueprint including online and offline touchpoints. This outlines the desired customer and process journey, the supporting capabilities and technology, and any new/amended business requirements outlined against key steps. We dedicate time to thoroughly considering both the ideal user experience and potential challenges users may encounter. When necessary, we actively collaborate with internal stakeholders and

other government teams to realign around user journeys. This effort aims to increase transparency regarding the data users provide at each stage of their journey and to identify opportunities for enhancing user satisfaction. We work with the delivery teams to build a clear set of performance metrics to be able to measure success at the service moments we are looking to impact. This helps justify the design direction we are going or if we need to tweak anything along the way.

The service blueprint is the foundation of the required business architecture for the Service Design and will be the key artefact in getting approval for the design and in implementing any transformation.

A National Health Provider saw an opportunity to better address an emerging public health crisis of people engaging with their own health and physical and mental wellbeing too late to prevent long term illnesses. Clarasys analysed findings from over 80 stakeholders across Government (Public Health England, NHS Trace Digital), global health experts, and primary user research to form a clear outline of user personas, pain points, and needs. Taking these we were able to shape opportunity areas to ideate how to improve the service, which formed requirements to prototype that went on into Alpha and Beta.

4. Planning the implementation

After designing improvements to your service we will plan how they will be implemented, getting agreement on what an appropriate Minimum Viable Product (MVP) is to work towards. We will take account of priorities, dependencies, resource constraints and budgets to give realistic timelines and milestones to work towards. For example we will look at any competing initiatives your service users are having to account for and work with you to determine the level of change they can manage and what is of most value for the organisation to deliver and when. We can model resources to highlight the capacity required from your internal resources and any external support to supplement them and this will include scoping and identifying the need for business change to ensure this is effective.

To enable you to effectively lead implementation without us, we will build transition materials explaining the design artefacts built during previous phases. A plan will be provided to those that will be responsible for enacting the design. We will also conduct detailed handover and upskilling meetings around the to-be design and background behind design decisions. This will give the implementation team the best context to realise the solution and create the anticipated value for service users.

His Majesty's Prison & Probation Service (HMPPS) had brought in a large consultancy to run the implementation of their new Electronic Monitoring service after Clarasys had completed the design phase. There was a large risk of legacy design knowledge leaving the programme as Clarasys's contract ended. To mitigate this, on top of our design activity, we ran upskilling sessions

on the current design for civil servants and incoming implementation consultants. We collated and logged all design documentation and provided a narrative to each as to how it formed the design due for implementation. We also scenario planned and outlined the ways we would mitigate certain issues arising during implementation, preparing implementation consultants to look out for early signs of potential issues. This gave HMPPS' EM leaders and the programme confidence that design knowledge and experience was completely transferred.

5. Supporting Delivery

As design moves into implementation and the service goes live, our Service Design consultants will support delivery teams to work through future changes to the design as more users are onboarded to the service. By having a Service Design mindset embedded within the enduring multi-disciplinary teams (beyond the initial discovery and design), we will likely unearth new challenges and perspectives. This will provide further feedback and insights to refine your service, ensuring it continues to deliver value for money, reduce operational complexity to support it and meet user needs.

Case Study

NHS Trace had the challenge to meet the nation's rising demand for test kits in managing the outbreak of the COVID-19 pandemic.

Clarasys supported the scaling and stabilisation of the supply chain part of the service. Taking a user-centred approach we uncovered pain points for users within delivery teams relating to how they were able to manage the service, scaling its technology to meet demand. We ideated around this challenge and designed a new product capability for the service to better triage, shape, and prioritise additional demand for test kits. We built and iterated this capability, testing its impact as it transitioned into the service.

Our approach led to the rapid scaling of the service and produced a National Audit Office (NAO) and a Medicine & Healthcare products Regulatory Agency (MHRA) compliant product. We built out a cross-team 12-month technology roadmap to further enhance the service over time with clearly defined costs, priorities and management strategies that took the service to delivering 5 million test kits per day.

Product Management

We transform government digital services and optimise patient, citizen and staff experiences with our expert Product Management approach. We deliver end-to-end cloud-based solutions (from discovery through to live and retirement) and embed accessibility, efficiency, compliance, user-centricity throughout.

We have 10+ years of experience in Product Management across the public and private sectors and have a team of 90+ trained Product Managers (80+ of whom are Certified Scrum Product Owner trained). We have supplied 75+ Product Managers to support 50+ digital products and services within the Home Office, NHS Test & Trace, His Majesty's Prison and Probation Services (HMPPS), and the Ministry of Justice. Our experience covers all elements of the product lifecycle - from discovery, alpha, beta through to live and retirement, whilst adhering to Government Digital Service (GDS), NHS service standard, and Central Digital and Data Office (CDDO) standards for accessibility and service assessments. We have also created and implemented product management training programmes to further enhance in-house product capabilities and encourage more product-centric ways of working.

Through our extensive experience, we understand product delivery challenges in health and social care digital delivery, including the importance of spending reviews and the annual funding cycles whilst also prioritising user experience enhancements. We also help our clients look to the future of the product's development, with a focus on AI innovations such as Generative AI, its government applications alongside CDDO and Department for Science, Information and Technology (DSIT) policies that govern its use. We have trained 20+ Home Office product managers on using AI for product development.

Our consultants undergo training in the latest Product Management methodologies, technology tooling (i.e. Roadmunk for roadmaps, Jira for backlogs and Power BI for reporting) as well as cloud technologies for building product solutions (i.e. Amazon Web Services, low-code or no-code solutions).

Our product community continually undertakes emerging technology research and actively employs horizon scanning techniques to stay ahead of market trends. We also ensure our consultants are informed about innovations and new advances in the market by attending practitioner led events. One of the ways we share this knowledge amongst our consultants is through hosting 'lunch and learn' sessions on specific technology developments.

Our approach

Our tried and tested product management approach enables us to build high quality products from inception, support the turnaround of underperforming products and

successfully transition projects into products. We are responsible for ensuring that the product is delivering value for the organisation (i.e. providing value for money for citizens, removing risk, addressing compliance/regulatory needs) and for its users (i.e. citizens, patients). Our end-to-end approach is user-centred, underpinned by data and clear Key Performance Indicators (KPIs) throughout. Our iterative approach involves the Discovery, Alpha, Beta, Live and Retirement phases as shown in Figure 2.

Figure 2: Our approach to product management



1. Discovery

The first phase focuses on gaining a deep understanding of the user needs and what a product, if required, would be aiming to solve for the user. Our product managers conduct a series of interviews, surveys, workshops and focus groups using Design Thinking to gain visibility of the current state and create problem statements. In addition the product managers also:

- Understand current user challenges and organisational requirements
- Define the overall vision and KPIs for measuring success
- Identify initial opportunities that are worth exploring in the next phase that address the user challenges

In 2019 we ran a discovery for the NHS to design online consultations for patients on the NHS app. We applied a user-centred design methodology and research techniques such as: interviews, quantitative surveys, affinity mapping and job shadowing to develop the problem space. This research informed a new end-to-end service design, including to-be user journeys by persona, and prioritised user needs. All our work followed industry standards (GDS, GOV.UK Designs) and enabled the creation of a prototype for a Proof of Concept that was tested with members of the public. This research and service design helped us create the prioritised roadmap and Minimum Viable Product (MVP) for Alpha.

2. Alpha

The second phase focuses on testing and prioritising features using prototypes to understand the best solution to solve the problem identified in discovery. The product

manager creates a service overview framework that measures the success and performance of a product as well as user engagement. The product ideas are captured in a product backlog and fleshed out into a product roadmap with prioritised features based on user needs and creation of minimum viable product (MVP).

At the Home Office, we worked closely with Asylum decision makers to design a replacement for a digital interviewing product. Utilising our user-centred design (UCD) expertise, we conducted extensive research to understand user pain points with the current system to design a prototype which was more aligned with their needs. Subsequently, through rounds of usability testing, we iterated the designs based on feedback that led to building a product which received a System Usability Score (SUS) that was a score over 80 indicating that users felt it met their needs and would recommend it to their friend.

3. Beta

The third phase is about building and scaling solutions in a controlled environment. The product manager works closely with cross functional teams to build and iterate the prioritised product features. As we scale from private beta to public beta, we continue to engage the key stakeholders and incorporate feedback in an agile approach. We will continue to gather feedback early and make enhancements to the product until its launch.

Working on NHS's mobile application in 2019 we managed the product through its Beta release. We created and managed the application's cutover and phased implementation plan, factoring in cross-supplier and technical dependencies and delivered key communication activities to a diverse set of impacted end-users. We also coordinated go-live support (hypercare) to over 7000 practices across NHS England, to validate key user and technical journeys. Increasing collaboration between NHS Digital, NHS England and suppliers was key to achieving a successful go-live in tight timeframes.

4. Live

The fourth phase is where we will continue to provide support and continuous improvement through the go-live preparation and product launch phase. We will engage with users post go live to track engagement with the new product or service. We achieve the above outcome by gathering customer feedback and iterating the product and service. We also carry out decommissioning activities when the product or service no longer meets its purpose and monitor products through its lifecycle.

Lastly we ensure appropriate upskilling and handover to Business as Usual (BAU), for you to successfully continue on the journey.

At a UK Healthcare charity, we were involved in the delivery and launch of an online gym booking tool for 25 gyms following an acquisition. We performed a series of workshops as well as document analysis to understand user journeys. We then executed a series of prototype tests with acquired staff. We iterated based on their feedback to meet their needs where possible, whilst aligning to a UK Healthcare charity agreed best practice process. We delivered a solution that was fit for purpose, with all 25 sites going live on time. Satisfaction levels have since increased to levels in line with existing sites.

5. Retirement

The last phase is where we treat the services that eventually retire with the same level of care in the way we built the service due to process or policy change making the product redundant. We achieve the above outcome by leading cross departmental collaboration to gain buy in on the retirement decision and engage with stakeholders to implement change.

At the UK Visa & Asylum department's Biometric Residence Permit Fulfilment (BRPF), there was a concern about whether to discontinue the product since it had no apparent long-term plan beyond its immediate features. We developed a strategic plan for the product's long-term future, which indicated that the product should be phased out after 2024. We also established a new in-house multidisciplinary team with diverse skills to operate in an Agile manner, integrating developer, testing, and portfolio resources into a single team. As a result, we enabled UK Visa & Asylum to phase out an outdated and costly external technology, costing approximately £2m per annum to operate, with a less expensive and more manageable in-house technology.

Case Study

As part of the national Covid response, NHS Test and Trace was tasked with creating the digital Test & Trace platform. The physical products existed, but there was no service to get the product to UK citizens. There were limited insights, designs, user needs, roadmaps and solutions - while there was an urgent need to build a modular and scalable service that could evolve with the changing needs of devolved administrations and new scenarios.

We formalised the service strategy by introducing product roadmaps, user story maps and iterative service designs to show how the underlying service would evolve. We undertook user research to ensure the service would be fit for purpose and meet user needs. We captured these improvements in a user story map to iteratively improve the service in an agile way. We worked with senior stakeholders to advise on the best options to take the service forward with maximal impact while working with and in the delivery teams to ensure the service delivered the desired outcomes

We successfully launched the service on time with a shorter digital journey, with an improved all round experience for citizens. This enabled the increase of access to vital products to all UK citizens in the effort against Covid. Devolved Administrations and multiple use cases were brought onboard to use the service in a modular way, reducing time to implement changes. The team supported the alignment of existing separate services into one universal offering.

Programme & Project Management

Our flexible programme and project approach enables the efficient delivery of complex health and social care policy outcomes, effective mobilisation and implementation of large scale cloud-based agile transformations and the successful delivery of critical national infrastructure.

Clarasys has supported over 250 programmes and projects. We provide frameworks, processes, and tools for planning, organising and controlling projects and programmes to ensure successful outcomes in dynamic and complex environments, whilst also complying with government assurance processes and healthcare standards (e.g. NHS Service Standard). We understand that every organisation and project is different and therefore the right approach varies. This is why all Clarasys consultants receive training in:

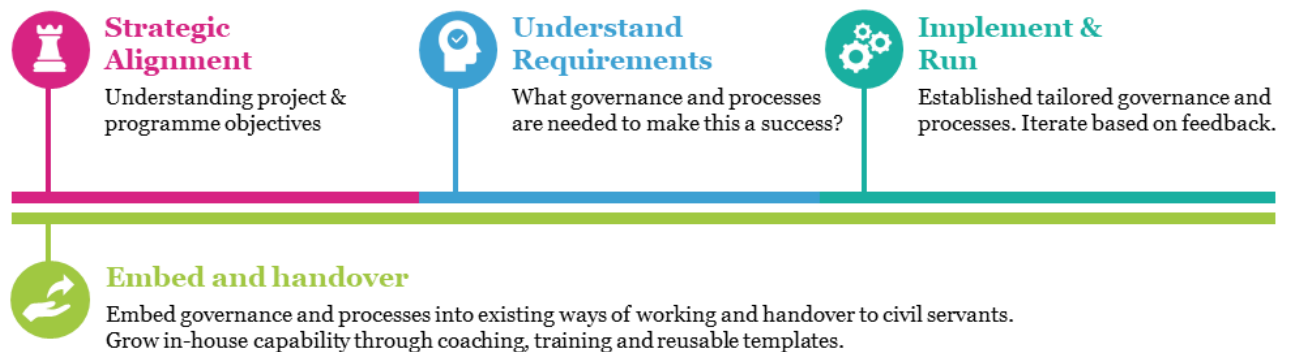
- a. **Traditional project management** where each phase must be completed before moving to the next. Our project managers use this method where there is a need to work within structured governance models or on capital projects, with more defined delivery timelines, funding cycles and funding reviews.
- b. **Agile project management** where planning is undertaken iteratively and there is a greater emphasis on flexibility, collaboration, and adapting to change. Our project managers use this method where requirements are likely to change or evolve during the project lifecycle and the team needs to be able to respond quickly to experimentation and feedback.
- c. **Hybrid project management** where organisations are currently working with a blend of both traditional and agile methods or are wanting to shift to more agile ways of working.
- d. **Programme management** where there is a need to coordinate multiple projects, initiatives, and activities that are aligned with the organisation's goals and objectives.

In addition to the above training, over a third of our consultants have formal training in Certified Scrum Methodology, PRINCE2, APM, PMQ, Scaled Agile Framework (SAFe) and Large Scale Scrum (LeSS). Alongside managing projects and programmes, we have experience building in-house capabilities for organisations in line with the technical and behavioural competencies outlined in the Project Delivery Capability Framework.

Our approach

Whilst the following stages of our approach are applied to all programmes and projects, we will work with you to understand the needs of your organisation and tailor this in order to create the right structures, processes, ways of working and documentation.

Figure 3: Our approach to project and programme management



1. Strategic alignment

The first phase begins with aligning the programme or project with the organisation's strategic objectives (including the perspective of people, process and the planet). Our project/programme managers host workshops and focus groups with key stakeholders to understand their vision, scope and what success looks like for the programme or project. In more traditional/hybrid projects, we would also review any business cases and create/review project initiation documents (if needed).

At St John's Ambulance, in the first week of our engagement we held 3 full day workshops with leadership to understand the main drivers of undertaking a digital transformation programme. We also had 1-1 interviews with heads of departments to elicit existing information on the challenges they faced with their current systems. These sessions helped increase visibility of where the key priority areas of the programme were and how we should sequence the various projects accordingly.

2. Understand requirements

Once alignment is achieved, the project/programme manager brings together all the teams involved in making it a success and hosts a kickoff session and planning exercise. These sessions include sponsors, suppliers, change representatives, business architects and key stakeholders to identify all the initial activities, dependencies and milestones for the project/programme as well as the required capabilities, structures and channels to ensure a smooth delivery. These structures and activities will differ depending on the working environment. In an agile

environment we would look to understand the Minimum Viable Product for delivery, the key milestones that will need to be delivered and the sequence they would need to be delivered in to release additional rounds of funding. In a more traditional approach we would develop a detailed project or programme plan to understand the critical path and build a work breakdown structure to clarify the underlying project scope and objectives.

As part of our work with the government's health service to provide a contract tracing service in response to the COVID-19 pandemic, we spent the first week of the programme running sessions with policy, healthcare professionals, and operational teams. The objective was to evaluate the 280 policy changes in 2021 to understand the parameters of the programme and how we would prioritise key milestones to have maximum impact as quickly as possible. This insight also highlighted the need for strict governance processes to maintain scope and protect the capacity of the team.

3. Implement and run governance structures

Based on the insights from the above two phases, our project/programme managers establish and run tailored governance processes that prioritise visibility, collaboration, integrated planning and continuous improvement. Depending on the needs of the project or programme, the following processes may be established:

- Risk, issue and dependency management
- Project plan, milestones creation and tracking
- Budget and cost management
- Controls and approval routes appropriate to each stage of the project to monitor project progress and compliance
- Capability tracking and planning
- Measurement of value and benefits
- Stakeholder engagement and communication

If operating in an agile or hybrid environment, common processes and tools such as Scrum and Kanban as well as daily standups, sprint planning sessions, demos and retrospectives will be set up to ensure learnings are being regularly incorporated.

For more traditional teams and organisations, the project/programme managers may set up weekly reporting sessions, stage gate approvals and project boards to ensure transparency and manage change requests. A project status report will be maintained weekly to track progress and highlight key blockers and dependencies. A Responsible, Accountable, Consulted, and Informed (RACI) matrix will likely be

established to ensure everyone understands governance approvals, sign offs and how decisions are made.

The project/programme managers will also establish robust mechanisms for monitoring progress as well as risks to ensure we identify, escalate and mitigate any that may impact key objectives. We understand that teams need to deliver in hybrid environments, so will maximise the use of existing tools that organisations use (such as Teams, Slack, Jira, Office 365) to drive collaborative and structured ways of working.

We also recognise the importance of ensuring health and social care requirements can be effectively managed within our governance processes. For example, responses to freedom of information requests, the need to comply with public law, and the secure and effective data management of patient electronic health records. Addressing these requirements early enables scrutiny at the right level at the right time, allows any conflicts with stakeholder interests to be resolved and enables access to expert advice and best practice, such as legal, accounting, policy and economist expertise.

4. Embed and handover

We understand that the need for project and programme management is likely to be a constant for lots of healthcare organisations and therefore prioritise building in-house capabilities that set you up for future success. Throughout the above approach, our project/programme managers provide opportunities for knowledge sharing, on-the-job coaching and training sessions. They also create communities of practice for those interested in building project/programme managers skills to help foster an environment of exchanging ideas, sharing what's worked well and opportunities for improvement. For close down of a project or programme, our project/programme managers create handover documentation to ensure all frameworks, templates and examples are available in the future.

When working with a UK healthcare provider, it was evident that internal teams needed to be able to manage projects in a constantly evolving environment with multiple vendors and change requests in the long run. As such, the Clarasys team prioritised coaching sessions focused on demand management across the 20+ products and 3 suppliers. Internal teams gradually took over coordinating current and upcoming capacity demands as well as communication to senior stakeholders to ensure greater visibility of delivery priorities and capacity.

Case Study

A UK Healthcare charity had a business critical system that handled all bookings and contract management for private and corporate customers that needed to be replaced. They had tried to deliver the programme for 5 years but were struggling with multiple resets and technology changes which caused a lack of trust in the project, blurred scope and eroded relationships. Clarasys was brought in to recover the programme and implement and run new structured governance processes.

Upon commencing we performed a rapid diagnostic to assess the project state, root cause, and organisational needs. This was done by observing ways of working, reviewing existing documentation and processes and having 1-1s with those impacted by the programme. The outputs from this were prioritised with the first action being implementing a regular cadence of meetings with technology vendors. This regular collaboration increased visibility of the activities, dependencies and risks which was then fed through a robust governance model which included change request processes, risk management and capacity tracking.

Benefits were realised within 4 weeks of the project going live: weekly revenue was up by 20% due to the better system, data cleanse, and user training. In order to ensure long term sustainable continuous improvement and enhancement of the system to suit user needs, we set up a product owner community made up of individuals across the business who could own and shape the development of the tool. This team is still in place and continues to build upon the high quality initial system with new features and adaptations to meet the evolving needs of the business.

User Research

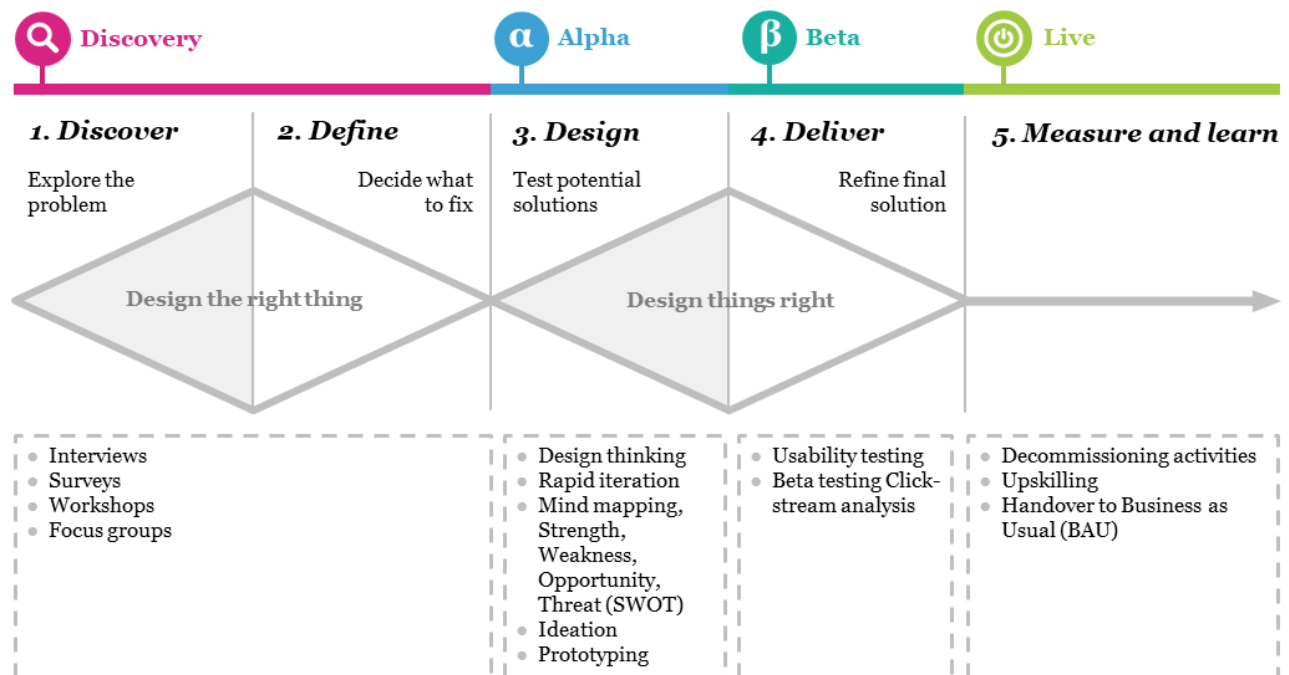
Our user research approach embeds a user-centred approach from day one, improving citizen-facing services, building better internal products and ensuring central government projects and programmes can meet their users' needs effectively.

User research (UR) at Clarasys forms a fundamental part of how we build products and services as well as how we deliver projects and programmes. We have 60+ consultants trained in UR techniques and 10+ years of experience conducting UR across government, including at His Majesty's Prison & Probation Service (HMPPS), Department for Business & Trade and the National Health Service (NHS).

We tailor our UR approach based on your needs. We work with senior leaders to embed user-centricity within their organisations to support the development of citizen-facing service and cloud-based digital solutions. We can also provide user researchers within multi-disciplinary teams as part of a flexible resourcing model which can scale up and down given your demands. We take a pragmatic approach (outlined below - see Figure 4) from our years of UR experience that covers usability, functionality, sentiment and competitive analysis, underpinned by our core principles of collaboration and co-creation with users. This provides a comprehensive understanding of users' needs, behaviours, and preferences. Additionally, it fosters a culture of continuous engagement, using feedback to drive action and iterative improvements to the service, programme or internal initiative itself.

We understand the importance of research ethics and government guidelines (such as Government Digital Service (GDS) best practice and the NHS Service Standards) and have deep expertise in conducting research and delivering actionable inclusive user insights for complex health and social care policy areas to deliver better patient outcomes.

Figure 4: Our approach to User Research



Our approach

We apply techniques such as the double diamond approach (discover, define, design and deliver), agile methodology, and a blend of qualitative and quantitative research methods to ensure a holistic understanding of user needs, identification of crucial insights, trends and patterns. The result is actionable research insights that will inform slices of value throughout.

NB: A 'slice' could be horizontal relating to one element of the user journey, or horizontal relating to a specific end-to-end scenario which is then run through the double diamond.

1. Discover

A key challenge in discovery is knowing when the user research is complete in order to progress to the next stage. To do this, during discovery we gather user insights, pain points and behaviours to gain a clear understanding of the problem. We create a tailored research plan that balances breadth and depth to cover the key user groups (vulnerable populations, hard to reach groups, charities representing people with particular health needs) and accessibility which enables us to inform early designs earlier on in the process. When selecting participants to speak to, we carefully consider the right balance (i.e. primary research versus secondary research) in context of the overall product or service objectives. Our approach has research ethics embedded throughout and combines a range of interviews, surveys, focus groups, research analytics, user journey mapping, ethnographic and technographic research.

Public Health England needed to address an emerging public health crisis of people engaging with their own health and wellbeing too late to prevent long term illnesses. Over a 10-week discovery we led a user and evidence-led approach, engaging with over 90 stakeholders across Government departments and global health experts with 6 interviews and over 50 survey results to develop a detailed understanding of what a digital wellness and prevention offer could look like. This helped the client to achieve a clear understanding of existing health services and industry leading case studies based on up to date research, and the most pragmatic and impactful starting point to take the service forward.

2. Define

In this phase, we use insights from discovery to define a clear problem or opportunity statement (or multiple statements) to ensure we are solving the right problem for the right users.

We took this approach with a £1billion international information services client who wanted to improve overall market share and make it easier for customers to know the different products they offered. We analysed insights from 120+ customer interviews to validate assumptions and hypotheses, refined these through feedback and defined 30+ actionable opportunity statements which identified new and existing revenue streams. This resulted in a deep understanding of their users' priorities and contributed to future growth.

3. Design

We generate potential solutions to the problem or opportunity via innovative ideas generation techniques such as Design Thinking, rapid iteration, mind mapping, interactive ideation sessions and prototyping. Using agile principles, we iteratively test these ideas with users through techniques such as user forums, work shadowing, A/B testing and workshops where we walk through proposed changes to the customer journeys considering impacts to different stakeholders. We are forward thinking in our design approach, always looking to incorporate future trends affecting the user research discipline such as applying artificial intelligence tools to accelerate data gathering, exploring how Digital Twin and simulations can test designs more efficiently and considering the impact that immersive experiences are having on citizen expectations of government services.

As part of our work with the NHS, we were asked to design a testing solution, which catered for 100+ requirements at pace. Our user researchers presented scenario based roadmaps and designs to Policy teams, GDS and clinical stakeholders in a series of interactive workshops. Their feedback was captured into a backlog of future improvements which would deliver desired outcomes. We also created a framework (based on customer impact) to prioritise

improvements with decision makers and ensure the maximum benefit was realised as early as possible.

4. Deliver

During delivery, we continue to refine, test and scale the solution to ensure it meets user needs by gathering feedback continuously throughout. We use methods such as usability testing, beta testing and click-stream analysis to validate the effectiveness of the product or service before it is fully released to all users. This is especially important when delivering complex services with multiple customer journeys and large transaction volumes.

The NHS needed to develop their application to be able to manage and attend online consultations. During the design phase, we worked with a development team to develop functionality that achieved the ideal end-to-end customer journey, derived from multiple prototypes that were generated and tested through 10+ rounds of usability testing with 250+ members of the public. This ensured the final design catered for a wide range of users with varying levels of technical abilities when the application was launched to 30+ million users.

5. Measure and learn

We will continue to foster a user-centred approach to the product or service post-launch by listening to users on an ongoing basis.

We will set up and embed listening strategies that gather user feedback, capturing their overall experience of interacting with the product or service. We will also utilise performance data from the launched product to drive continuous improvement. For example, we use pain points and service desk tickets to constantly look at how the product can better meet evolving user needs. Our approach aims to enable the continuous improvement of the service over time, even after the handover of the product and service to business as usual (if it is not maintained by the product team who initiated the discovery work).

The Home Office asked us to help them use their diverse customer experience (CX) data more effectively. We embedded performance frameworks through sprint planning & roadmapping that ensured CX data was a consistent input into prioritisation, and evolved the product team by recruiting performance analysts and organising around tactical & strategic feature fixes. We measured performance KPIs to improve our CX understanding and used playbacks & dashboards to understand the performance data & utilised it to drive improvements in CX (reducing failure demand). As a result, we increased the number of weekly improvements by 150% across 125+ visa application routes for 850K users.

Case Study

During the COVID-19 pandemic, the government's healthcare department was tasked with providing a service and physical products to support the national response (Test & Trace). There was an urgent need to build a modular and scalable service fundamentally designed to fulfil the needs of UK citizens, however there had not been sufficient consideration of the needs of the various stakeholders who needed the physical product. The so-far limited investment in user insights, designs, needs assessments, roadmaps, and solutions meant that Clarasys was brought in to design and launch a service that could effectively serve the needs of the UK population.

Despite short timelines due to operating in a crisis environment, we engaged in extensive user research to ensure our designed services would best serve stakeholders despite being in a complex and rapidly changing environment. We engaged over 7 main stakeholder groups during the Discover phase, understanding the needs across a disparate and fragmented stakeholder landscape and during which we produced user story maps that were used as a basis to build our product roadmaps and iterative service design. We also ensured the needs of vulnerable and hard to reach populations were adequately provided for as a core requirement of the solution. Throughout Define, Design, and Deliver we continued to champion user-centric design, ensuring that we were maintaining rigour through numerous iterations, improvement cycles, and changing government requirements as the health crisis rapidly developed. By working in an agile manner, we were able to incorporate insights from evolving user needs through multiple iterations of our designed service.

We worked with senior stakeholders to advise on the best options to take the service forward with maximal impact. We worked with and in the delivery teams to ensure the service delivered the desired outcomes, ensuring that the insights gained through our user research were reflected throughout the service. This resulted in shorter digital journeys, an improved all round experience for citizens and the successful, on time launch of national services.

Digital Transformation

Our user-centred digital transformation approach enables citizen and operational benefits to be delivered efficiently and sustainably. Our experts help you drive organisational alignment around the why behind change (vision and strategy), the tools required (capabilities, structures and processes) and embed continuous measurement throughout (outcomes and metrics) to achieve the right outcomes

In delivering 80+ digital transformation projects across the last 14 years, we have perfected how to take your vision of an improved digital journey and cloud environment from discovery through to delivery and adoption. We have the full set of capabilities to enable us to deliver your transformation end to end with expertise in User Research, Service Design, delivery management, government procurement, and change management. This is all underpinned by our deep knowledge of relevant technology platforms to explore and how to best implement them.

We manage government transformations adhering to the NHS Digital Service Manual and NHS Service Standard. We leverage these to design and deliver accessible transformations in line with the NHS Design System both in terms of digital accessibility (e.g. Web Content Accessibility Guidelines 2.2 compliant) and ensuring that products and services are accessible to the people that will benefit from them most. We run our transformations through Agile methods and integrate government best practice Discovery, Alpha, Beta and Live phasing into our approach for digital delivery. We partner with our clients and any digital assessors to collaboratively realise the best outcomes for citizens, evidenced in passing 11 digital service assessments.

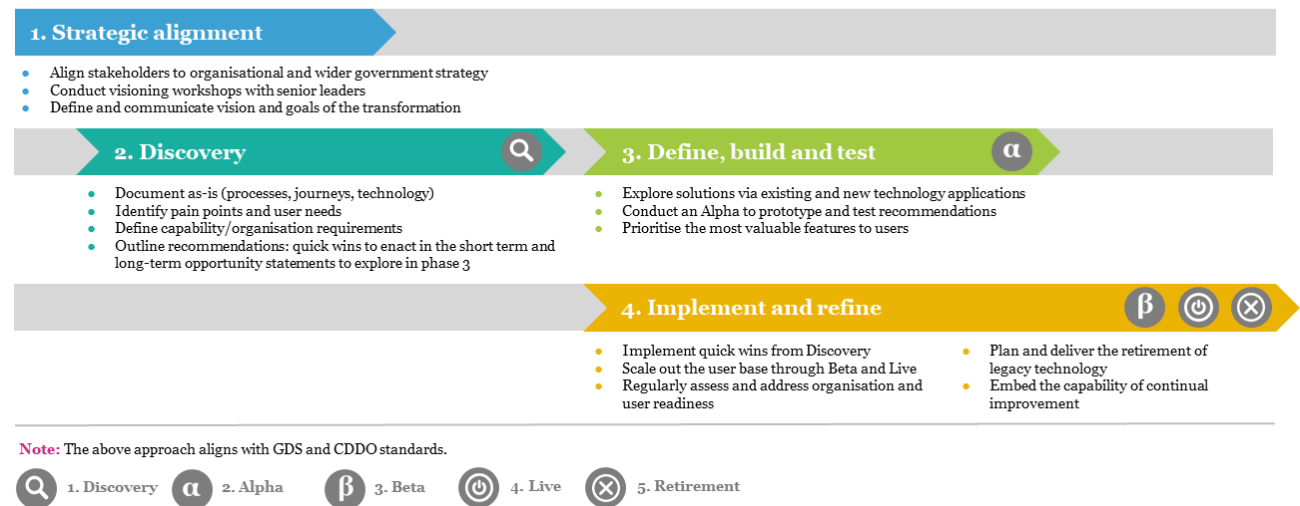
Our approach

We believe that the most effective transformations are not a one-off exercise. The capability for continuous, sustainable improvement should be embedded to allow organisations to adapt their digital offerings to changing policy pressures and market demands. To realise this our digital transformation approach leverages our user-centred design, Agile, and change methodologies. They enable us to solve the right problem for the right users in a way they are ready for, while establishing how to continuously improve and deliver value to the organisation. We partner with your end-users to develop, prototype, and test creative solutions early on, balancing user's digital and human interactions to align with their preferences, behaviours, and accessibility needs, ensuring the digital transformation delivers meaningful outcomes.

Our four-phase approach delivers your digital transformation end to end. As the digital solution that best aligns to your strategy matures we adopt the Agile delivery phases (see

our Product Management offering - page 13 for further information) to ensure the transformation is user-centred, iterative, and scales effectively.

Figure 5: Our approach to Digital Transformation



1. Strategic Alignment

From day 1, we will align to your organisational strategy. We will take into account organisational priorities and wider government ambitions (NHS Long Term Plan, Integrated Care Systems), understanding the interdependencies between your organisation, the services you deliver and who you interact with. We will hold visioning workshops with your senior leaders to understand where you are trying to get to and what good looks like for you (i.e. an agreed view of what exceptional citizen experience looks like). We drive towards the key outcome of being able to clearly define and communicate the overarching vision and goals of the programme. We will work with you to identify key decisions and measures required early on, with the aim to get these agreed and documented with the right stakeholders in the most efficient way. Building consensus and driving alignment across impacted stakeholder groups on what direction we are heading and how we will track progress along the way to know if we have been successful is critical.

We will centre our vision and goal setting around the components of our 'Digital Dimensions Wheel' as shown in Figure 6. These dimensions look at your Structure, Process, People, Technology, and Information to help holistically assess the opportunities for transformation with your senior leaders. It enables us to assess the maturity of your organisation to begin a transformation and acts as a design tool to determine what needs to change in each dimension to realise the transformation.

At the Commissioned Rehabilitative Services (CRS) Programme we ensured we were aligned with the departmental strategy by extensively researching current departmental strategies, as well as engaging policy strategy early in the

programme, ensuring that as we defined the aims and objectives for the programme, they supported the aims of the both specific directorate strategies like the Rehabilitation Strategy but also supported more organisation wide aims in the His Majesty's Prison & Probation Service (HMPPS) business strategy. When sharing our programme aims and objectives, we ensured that there was traceability between each objective and a relevant strategy.

Figure 6: Digital Dimensions Wheel



2. Discovery

Running in parallel with our Strategic Alignment phase we conduct a Discovery phase to comprehensively assess the current landscape of the organisation and outline challenges, pain points and user needs in line with the wheel's five digital dimensions. We will feed initial findings into Phase 1 visioning workshops to bring to life the latest user journey experiences to senior leaders.

On forming a cross-functional team we will initially meet with lead stakeholders and end-users to comprehensively understand the problems in each dimension that we are trying to solve. For example, whether we have the digital skills needed to successfully deliver the transformation, if there is the appetite amongst users and the

organisation to accept the change, or relevant data is available at a key stage in the journey.

We will document your as-is processes, end-user journeys and supporting technology via techniques such as process mapping workshops, shadowing, and IT capability mapping. We will also rapidly review current technology and third party spend to ensure you are getting value for money on the existing IT estate. Understanding the current state enables us to run requirements workshops with stakeholders to define clear capability requirements and business needs that tie to improving and enabling the desired user journeys and vision outlined in **Phase 1. Strategic Alignment**.

This culminates with identification and detailed documentation of the gaps between the current state and future ambition. We will provide a set of recommendations to address the gaps that are broken down in a transformation roadmap by quick wins to enact in the short term and long term opportunity statements to be tested and validated in subsequent phases.

Clarasys previously followed this approach in HMPPS's Electronic Monitoring Service, including documenting HMPPS's current state processes and pain points, translating their transformation ambitions into business requirements, and building a backlog of prioritised service improvements.

3. Define, Build, and Test

For the long-term recommendations we will work with your digital and procurement teams in defining how user needs can be addressed through developing capability in your organisation. Utilising our expertise in technology platforms we will explore rationalising and renegotiating existing applications to augment your current architecture (including NHS technologies like NHS login and the Personal Demographics Service (PDS) as appropriate). We will also identify options to bring new technology into your organisation. Where new technology is a feasible option we favour applying technology best practice (i.e. scalable off-the-shelf solutions, utilising low code no code, microservices architecture) and prioritise technology decisions aligned to your transformation goals and end-user needs. We will work with your procurement team to plan and support any market engagement required including drafting Request for Information (RFIs) and Request For Proposals (RFPs) documents.

Through our Agile delivery methodology and in line with conducting an Alpha phase, we will prototype and test our recommendations. We will explore the different solutions that can meet our user needs, gathering feedback on the features that matter most and iterating prototypes as we go.

NHSX saw an opportunity to better address an emerging public health crisis of people engaging with their own health and wellbeing too late to prevent long term illnesses. Clarasys provided our agile delivery practices to ideate and

prototype solutions to their challenge. We iterated on how web and app based tools in one place could encourage innovation, support consumer choice, and reduce future health service costs. Through the prototype we developed a backlog of improvement initiatives that we prioritised based on feedback and were able to shape an Alpha that helped NHSX realise a feasible long-term vision for wellness & prevention.

4. Implement and Refine

Our next phase covers implementing quick wins after Phase 2. Discovery and scaling out the prioritised solution features identified from Phase 3. Define, Build and Test. These activities align closely with the outcomes from a GDS Beta, Live and Retirement. We will also plan for and deliver the decommissioning of any elements of the product or service that the transformation replaces.

We utilise our user-centred design, delivery and change management skill sets within the cross functional team to build and iterate the high priority features identified. We will scale these from a Minimum Viable Product (MVP) for a smaller, controlled group of live users (Private Beta) to a service catering for more complex user journeys and higher transaction volumes (Public Beta), eliciting feedback throughout in an agile approach, making enhancements in the run up to Live. We will provide ongoing support and continuous improvement through the go-live preparation and full-scale launch (Live).

Across all phases we will regularly assess organisation and user readiness for each phase. We will build, improve and scale change capability (training, comms, networks) through each phase to ensure users adopt the transformation.

We will embed the capability of continual improvement and iteration in your organisation through establishing recurring feedback loops, governance and ensuring appropriate upskilling and handover to Business as Usual (BAU), for you to successfully continue on the journey.

For NHS Digital we managed the Beta release of their new mobile application. Our team managed the app's cutover and implementation phase including developing the overall plan, factoring in cross supplier and technical dependencies, and end-user readiness activities. We then coordinated the controlled beta phase which saw a phased roll-out to over 7,000 practices across NHS England, to validate key user and technical journeys. Increasing collaboration between NHS Digital, NHS England and supplier teams was key to achieving tight delivery timeframes.

Case Study

During the COVID-19 pandemic, the UK Health Security Agency (UKHSA) required a comprehensive national contact tracing service at a previously unprecedented scale. It needed to function within a rapidly developing context and according to the disparate needs of citizens, call centre agents, local authorities, operational, and clinical teams.

Clarasys, and our technical implementation partner Kainos, provided the business analysis, product ownership, and digital expertise which shepherded the project from a call-centre driven model through a digital transformation and towards a digital-first experience. At each stage of the transformation, we defined the scope and prioritised delivery to ensure that the most important requirements were being met, thereby increasing value to the end user. We fostered interdisciplinary teams, including policy experts, healthcare professionals, and operational staff to help empower decision making and accelerate delivery.

The end result saw Clarasys able to rapidly adapt the service within a changing policy landscape, iterate on and deliver a wide portfolio of releases, and ensure the continuous delivery of value to the end user across the end-to-end process of UR, design, delivery, and ultimately release. This led to the service facilitating over 20 million public interactions, navigating more than 280 policy changes in 2021, and managing more than 100 technology releases.

Business Case Development

We help government organisations build compelling, clear and compliant business cases that receive the required funding. Our approach reduces time taken to follow Five Case Model structure and increases the benefits delivered to end users by embedding value for money and wider stakeholder engagement and collaboration throughout.

Clarasys provide structured support in business case development in partnership with government departments, agencies and public bodies. Our tried and tested approach has supported multiple clients through the Five Case Model of the Government Green Book, by providing templates, actionable guidance and additional capacity to Senior Responsible Owners and civil service teams to accelerate the creation of all types of business case including: Strategic Outline Business Case (SOBC), Outline Business Case (OBC), Full Business Case (FBC) and Programme Business Case (PBC).

We support business cases across all phases of the Green Book process and have experience bringing a business case from PBC, SOBC to FBC, or supporting an existing business case in starting at OBC. Our structured and systematic approach to developing business cases helps government departments and agencies assess the value-added benefits of different options, prioritise investments, and allocate resources effectively to achieve desired outcomes for citizens and society as a whole. As part of the approach we support alignment and agreement for the aims and objectives for your initiative to help your team to agree on where you are going and how to get there.

Our approach

For our three step approach to business case development, we follow the Five Case Model structure whilst being flexible and iterative to the specific needs of the project or programme. We will work with you and your teams to build this over time, co-creating it with the relevant user and stakeholder input. We will always leverage existing information to assess whether the work undertaken at the earlier stages can be brought forward.

1. Strategic case definition

The first phase of building a business case is to create alignment on the strategic case for the initiative in line with government and organisational priorities.

This starts with the programme aims and objectives. In workshops with key stakeholders, we use tools such as the MOST (Mission, Objectives, Strategies, Tactics) framework to work through the case for change and define the core strategic drivers, benefits, and risks associated with the initiative and how it aligns with broader government strategies and policies.

We also use other information to shape ideas that directly address the case for change such as existing research, feedback on the current challenges, outputs from pilots or proof of concepts and pre-defined business requirements.

In this phase we work to define the inputs that will support the economic and financial cases, such as critical success factors, a long list and shortlist of options, including a preferred way forward. It is critical that the creation of the business case, occurs in tandem with the definition and design of the investment end state (e.g. service design, commercial definition).

We will also understand any initial economic and financial assumptions or constraints that will impact the strategic case and ensure that they are covered in the strategic assessment. The outcome of this is the definition of a Strategic Outline Business Case (SOBC), which we will then take through initial governance forums for feedback and input for the next phase.

Clarasys used this approach when working in the Commissioned Rehabilitative Services programme in HMPPS. We followed the Five Case Model and created the strategic case for the Programme Business Case (PBC) and Outline Business Case (OBC). We worked with programme leadership to create aims and objectives for the programme, defined the high level business needs and critical success factors for the £300m programme. We also created the benefits strategy and defined an initial set of benefits. This was then handed over to government economists to support the creation of the economic case for the service.

2. Outline Business Case definition

Using the feedback from the SOBC, we start to build out the details of the business case, expanding on the Strategic Case section as well as defining the content for the economic, financial, commercial and management cases. We carry out group and one-to-one interviews with stakeholders early on to understand the current state, which is used to define business needs and benefits.

With the inputs of the strategic case and existing landscape, including critical success factors, preferred way forward and benefits, the following analysis is conducted:

- **Economic case:** We will work with economists to assess the costs and benefits using techniques such as cost-benefit analysis (CBA) or cost-effectiveness analysis (CEA), in order to support the articulation of a preferred way forward.
- **Financial case:** We partner with government data and analysis teams and finance SMEs to understand the financial implications of the preferred way forward, including funding cycles, return on investment (ROI) and financial viability.

- **Commercial case:** We will work with commercial teams within the organisation to ensure that there is alignment across the programme and that the commercial case supports the objectives and business needs defined in the strategic case, including alignment with a procurement strategy if required.
- **Management/achievability case** including:
 - **Project plan:** showing the plan for delivery of the initiative
 - **Governance:** structure that supports the delivery of the initiative
 - **Risk assessment:** Identify and assess potential risks and uncertainties that may impact the success of the initiative.
 - **Implementation and deliverability considerations:** Our expertise in change management means that we can not only define the business case, but also supply key insights into effective governance and change strategies to help actualise the business case in alignment with your strategic goals.
 - **Contingency arrangements:** understanding means of contingency if delivery of the initiative is unsuccessful

Following completion of the OBC, we work with programme leadership to take the completed case through relevant governance forums (e.g. Gateway, Keyholder, Finance and Investment Committee). This will often include significant engagement with stakeholders both internal and external to the project or programme to ensure that they are aligned on the content of the case, that the case reflects the current status of the delivery and that any required changes are made following governance sessions.

Clarasys supported the development of a shortened Full Business Case for a National Government Department which was aimed at providing targeted programmes to reduce recidivism. We wrote a business case that articulated the main sections of the OBC and then updated the case based on feedback from the main governance forums and information relating to the preferred way forward. The business case was agreed with the appropriate boards and allowed for the service to be delivered.

3. Full business case definition

Following agreement of the OBC, we then work with the project or programme to procure the preferred technical solution, service or relevant skilled resources, including going to the external market for a procurement where required. We can support the procurement through our other capabilities such as service design, and project and programme management, or we can work with these teams to ensure that the business case is updated with the user needs, operational and technical requirements setting out what the required solution will need to deliver.

We then update the business case with the details of the solution including any commercial or contractual arrangements, as well as documenting the detailed management arrangements required to implement the agreed preferred solution. At this stage, we will also identify if any benefits identified in OBC have been realised in the current process, and ensure that ongoing and future benefits have owners and are clearly tracked. We will continue to review and refine the business case as we take it through the final round of approvals and governance.

Clarasys supported the development of His Majesty's Prison and Probation Service's (HMPPS) Electronic Monitoring (EM) Service Expansion and Future Service Programme Business Case (PBC). The business case was for £1.5b+ funding over 10 years. We led on the creation of the Strategic Case, and supported inputs in the economic, financial and management cases. During business case creation, we worked closely with in-house economists and HMPPS Finance to ensure the Economic and Financial cases were aligned to the changing service requirements, drawing on insights from policy, service design and live service data, ensuring that the business case reflected the service that we wanted to buy. The business case was accepted and agreed and was able to facilitate the successful procurement of the new EM service, allowing new suppliers to be selected and implementation of the new service to start.

Case Study

Clarasys worked with a large healthcare charity, supporting them in their organisation-wide digital transformation programme, involving ambulance operations, electronic patient registration and scheduling and rostering of medical staff and equipment. We ran visioning workshops with c-suite stakeholders to align on a vision for service, splitting the vision up into measurable objectives. Once this exercise was complete, the vision and objectives were signed off by the executive committee and board of trustees.

The team worked with programme stakeholders to elicit challenges and opportunities of the existing service through workshops and interviews with employees, services users, donors and volunteers. In support of the case for change, we discovered the need and desire for: a single view of the service user; accurate scheduling of people and equipment; patient records; high quality data and high quality data governance.

The team then defined key performance indicators and agreed how to measure success. We created and validated assumptions of impact of the transformation including delivering more for less, lower operation and tech costs. We collaborated with the charity's key healthcare partners, including the NHS, to ensure alignment on the outcomes that we wanted to achieve across the board. To determine costs, we factored in capital expenditure and operational expenditure. These inputs led to the

creation of high-level benefits and high-level costs, which enabled us to understand the best course of action to achieve our agreed objectives.

We explored the high-level benefits and high-level costs further in workshops to create and validate resource assumptions, factoring in contingencies and risks. The outcome of this allowed the programme board to proceed with the undertaking of the digital transformation, confident in the benefits they are striving for, for their stakeholders.

Change Management, Training, Communications & Engagement

Large changes require large buy-in from organisations. We are change management experts with over 600 completed change projects to date, which have enabled broad government changes using our collaborative and engagement-focused approach.

In the last 14 years, Clarasys has delivered 600+ business change projects across Government, not-for-profit organisations and private industries. All our Consultants receive in-depth change management training and we have over 20 subject matter experts accredited in advanced methods such as the Prosci ADKAR® Model and Change Management Institution. Our change consultants are highly experienced in building and delivering end-to-end digital and cloud programmes, embedding behavioural change and designing tailored communication and engagement strategies that ensure change sticks, whilst minimising the disruption to stakeholders' day to day role.

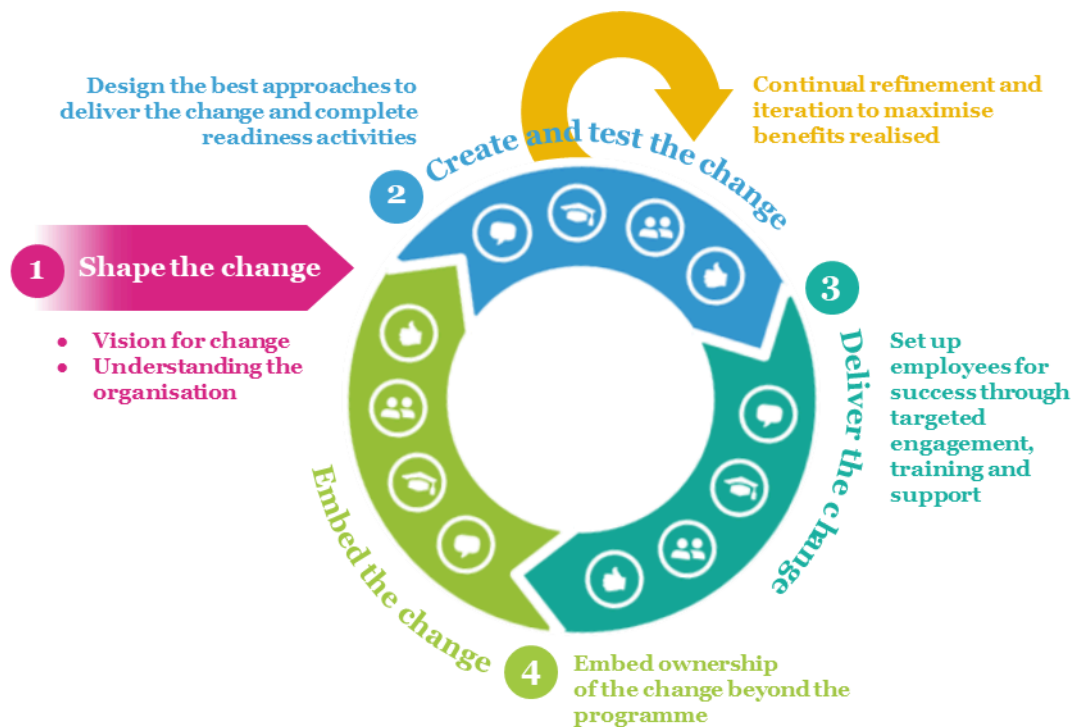
For any important change to be successfully adopted and embedded, we understand the need to ensure stakeholders feel understood, supported and prepared throughout the journey. As a result, we create and implement agile change strategies that enable us to deliver outcomes quickly and be adaptable and responsive to feedback. This also helps promote collaboration and engagement among stakeholders early which can increase buy-in and reduce resistance to change. We work closely with teams to understand and manage the impact of change upon everyone affected - from front line staff and clinicians, patients, operational teams, policy makers, partners and suppliers. We also have the ability to pull on innovative tools which gather sentiment and data-led insights into the impact of change interventions.

We also make sure we embed change knowledge and skills within your teams to set them up for future success. Our change strategies always include a handover period to account for any training, upskilling and creation of reusable materials to enhance your internal change capabilities.

Our approach

Our Clarasys change methodology and experience is grounded in industry-leading research and has helped implement lasting change at the Home Office, Ministry of Justice, Department for Environment, Food & Rural Affairs (DEFRA), His Majesty's Prison and Probation Service (HMPPS) and Public Health England.

Figure 7: Our approach to Change Management, Training and Communication & Engagement



1 Shape

The first phase of any change project is determining the overall vision and case for change (the ‘why’). This helps form a shared understanding of where the organisation currently is and what success would look like. We also establish a clear understanding of the stakeholder landscape by conducting stakeholder analysis and a change impact assessment. This evaluates the effect of the intended change across people, process and technology and helps identify priority areas of intervention to help mitigate risks and maximise the benefits.

St John’s Ambulance needed to understand and transform their internal services from a dispersed and disorganised service to customer and employee-centric. We analysed the current and future state, developed a detailed end-to-end target operating model covering all aspects from a process, people and technology perspective and created a change impact assessment and change strategy. This accompanied the design, feeding into an implementation plan that allowed the organisation to move straight into the next phase of the programme with a robust approach.

2 Create & Test

Using the above analysis, our change managers then design how best to deliver the change - including a roll out, training and engagement approach. To ensure interventions are tailored and prioritised correctly, we conduct a training needs analysis that involves understanding stakeholders current skills, knowledge and

abilities, and identifying the gaps that may prevent them being able to effectively adopt the change.

We will also work with you to establish a change network who will help mobilise support, facilitate training and sustain the change in the long term by reinforcing new behaviours, monitoring progress, and addressing any ongoing challenges or resistance.

As we develop a more detailed plan, we will work with your teams to understand;

- a. What are the preferred channels of communication, training and engagement
- b. What has worked well in the past
- c. What hasn't worked well in the past
- d. Working patterns or challenges that need to be considered as part of our approach and plan
- e. What other changes are going on in the organisation which could impact this

As part of the HMPPS Pathfinder to Improved Pre-Sentence Advice (PIPA) Programme, the team used their understanding of the stakeholder landscape to engage and prepare over fifty stakeholder groups for changes to the probation in court delivery model. Alongside this, they set up change networks of court leaders and team champions to create and test an appropriate change and training approach. The team then piloted changes to pre-court preparation, a new verification report and the introduction of the Digital tool Prepare a Case for Sentence (PACFS) in South Central courts. They used feedback from this such as appropriate times for training, requests for shadowing sessions and preferences around material accessibility to inform the change approach for the wider delivery model rollout in South Central.

3 Deliver

Based on the rollout plan and our change approach, we will kickstart targeted engagement, training and communication to set teams up for success and directly answer the question "What does this change mean for me?". Examples of how we have done this from previous projects include face to face training sessions, roadshows, leaflets, day in the life animation videos and app based FAQs available on the go. We believe in continual refinement and iteration based on feedback and the changing needs of different products, programmes and the wider political environment (e.g. Ministerial changes). Throughout delivery, we will regularly review uptake, satisfaction and operational performance and adapt our change activities to maximise their impact and effectiveness. Methods such as surveys, click through rates and gamification have proved successful in the past.

A UK Healthcare charity asked us to help make their outpatient appointment bookings and processes more customer-centric to improve the associated employee and customer experience. A key part of the success of this programme was the roll-out of training across 3 hub sites to over 250+ end users across 6 different user groups. We created a suite of training and learning support materials such as training presentations, demos and system based exercises all supported by job specific quick reference guides (QRGs) for ongoing support and reference post training. A set of 'train the trainer' sessions were also developed and all end user sessions had trainer guides developed to support trainers with any future training delivery. This ensured seamless transition to a new, more efficient outpatient bookings system.

4 Embed

We will put processes in place that not only sustain the change beyond a programme or project but also ensure ownership and continuous improvement. Through coaching and the handover of frameworks and example materials, your teams will have the confidence to deliver change with lasting and sustainable benefits in the future.

UK Healthcare charity had a heavily integrated and business-critical system that handled all bookings and contract management for private and corporate customers which needed to be replaced. After 5 years of trying to execute the project, we were brought in and successfully got the project over the line. A key part of this was embedding the change after we had gone to ensure the long-term enhancement of the system. We set up a product owner community made up of individuals across the business who could own and shape the development of the tool. The team is still in place many years later as they continue to enhance the system.

Case Study

Clarasys worked closely with a world-leading integrated healthcare organisation in the USA and supported their Human Resources team in the management of the Voluntary Employee Separation and Reduction in Force program across the Digital department. Their vision was to enhance patient care by providing coordinated and cost-efficient and transparent care. In order to achieve this goal, we designed a future state organisation that supported a \$40 million cost saving. We highlighted key activities, executed the design and approach through enhancing collaboration between DLT, HR, Finance and Legal teams. In addition, we drove senior leadership decision-making to enable technology advancement, headcount reduction, and improved organisational functions. We also led the communication and engagement, ensuring all Employee Separation Program information was accurate, timely and landing with the right stakeholders at the right time. It was critical that stakeholders were provided a range of support channels which we created for this difficult and highly emotional business transition.

Organisational design changes are incredibly difficult to manage and can create significant uncertainties, so our change strategy, management, and communications centred on transparency and a human approach. We engaged with key stakeholder groups to understand their needs, and that needs assessment informed our change approach. We identified particularly challenging areas and ensured we built early buy-in. Throughout the program, we iterated our approach to ensure that we were able to adapt to the changing needs of stakeholders and ultimately deliver the best outcome for people and business.

We leveraged our change approach to create stakeholder buy-in and understanding of the Employee Separation Program, and through that process, we were able to achieve largely voluntary separations, facilitated by our user-centric design of the program. We were able to achieve \$40m in cost savings for the organisation while minimising the overall stakeholder impact.

Business Process Improvement

We will help you to improve time to serve citizens and operational efficiency for civil servants by rapidly reviewing your processes, policies and redesigning your internal organisation using our proven approach and leading industry cloud-enabled practices, enabling you to meet your goals.

Business process improvement is a foundational capability for Clarasys. We have successfully fulfilled 1000+ business process improvement roles, including working with government organisations such as His Majesty's Prison and Probation Services (HMPPS), the Department for Transport, Public Health England and the Private sector. All of our consultants receive in-house process improvement training and we have a team of experts trained in methodologies such as Lean Six Sigma, Agile, Business Process Optimisation (BPO) and Total Quality Management (TQM).

Our success in supporting organisations to effectively improve their business process are grounded in three main principles:

1. Starting with a clear understanding of the needs of its users
2. Gaining a deep understanding of the organisation's unique needs, challenges and goals via its people (civil servants, courthouse staff, probation officers) and other relevant documentation
3. Taking a clear data-driven approach that focuses on tangible results and using insights to drive informed decision-making
4. Embrace a culture of continuous improvement where incremental changes are made systematically to enhance processes over time and employees at all levels are encouraged to contribute ideas for improvement and engage in problem-solving

Our approach

Business process improvement involves building a deep understanding of existing processes, analysing their effectiveness to deliver desired business outcomes and testing opportunities for improvement. To do this, Clarasys applies a four-step approach to all projects:

1. Prioritisation

Identify the processes within your organisation that need improvement. We can either use any existing data and insights you have gathered, or run our own tried and tested rapid discovery to help identify high-priority processes based on their impact on your operational efficiency, organisational goals and citizen experience.

In 2022, we led a discovery for a Government Healthcare Department to understand how to improve their digital services. To identify improvements in the user journey, we elicited information on existing services through surveys, focus groups, interviews and document reviews. This highlighted variances in the service (process, data, systems and users), pain points, manual process steps and other user needs.

We developed recommendations to standardise processes, improve data flows and remove manual/paper-based steps to increase efficiency, reduce costs and improve the user experience. To maximise reuse of data, and minimise rework, our findings were added to a research repository which informed a business case for Alpha.

It is also at this stage that we define measurements of success to effectively monitor the effectiveness of any potential process changes. Example metrics include, service delivery time (e.g. average time taken for citizens to complete online transactions), cost reduction (e.g. average cost to resolve complex cases), operational efficiency, (cost to run the service) time and resource allocation (e.g. occupancy rate for shared services call centres) and citizen experience.

2. As-is discovery and pain point analysis

Our consultants will utilise existing documentation, performance data and hold a series of discovery workshops to map out the current processes, and identify the priority pain points, and what is working well today. Utilising techniques such as user journey mapping, AI tools (e.g. Discy) for rapid pain point analysis and data mining techniques, we will perform root cause analysis to uncover what is causing these pain points, which need to be solved in our future designs and process changes. We will also review the technology landscape and architecture, organisational culture, and user experience to help us with the root cause analysis.

Clarasys supported Public Health England (PHE) to define a process to collect data for babies with Sickle Cell Disease and Thalassemia, as the initial programme funding was due to run out and the responsibility was to be moved to (PHE). We ran a series of interviews, workshops to understand highlights and pain points of current roles in the content of end-to-end common processes used in the programme. We also engaged with charities for advice on Sickle Cell Disease and Thalassemia cases to ensure we understood the human impact of our work.

3. To-be design and gap analysis

To design future process improvements, our consultants adopt a forward-thinking approach that leverages emerging technologies and prioritises user experience. Tools such as Digital Twin from Business Optix (BOx) allow us to create ‘mock’ environments where we can test the impact of certain decisions on your processes. We will also incorporate our in-house knowledge of emerging technologies relevant to

Home Affairs and Justice and assess their potential benefits, risks, and suitability for your business processes. These include the introduction of Generative AI tools, chatbots and predictive analytics. We will host workshops with your teams to draft a future state process that is simplified, efficient, and tailored to the requirements identified in the discovery phase. We also focus on designing processes with sustainability and scalability in mind, ensuring that improvements are not only effective in the short term but also adaptable to future needs and growth.

We helped a Public Health Agency to implement a single national IT system for its Diabetic Eye Screening programme. Initially, we identified the as-is process nationwide. Then, using user-centred design techniques we designed the to-be process, and engineered requirements to support this.

After drafting the future state processes, we will conduct a gap analysis to identify the discrepancies between current processes and desired outcomes. This analysis helps prioritise improvement initiatives by highlighting effort versus impact. This will inform the implementation plan, including scope, timelines and required resources to ensure success.

After prioritising the backlog with PHE in their Diabetic Eye Screening programme we performed a gap analysis to understand the necessary steps to reach the to-be state and resolve pain points.

4. Implementation

Having prioritised areas of improvement, the next step is to test the proposed solutions on a small scale e.g. a pilot group. This enables us to gather feedback from users and stakeholders, and the data from our agreed key performance indicators (KPIs) to iterate on the solutions.

For NHS Digital we managed the Beta release of their new mobile application. Our team managed the app's cutover and implementation phase including developing the overall plan, factoring in cross-supplier and technical dependencies, and end-user readiness activities. We then coordinated the controlled beta phase which saw a phased roll-out to over 7,000 practices across NHS England, to validate key user and technical journeys. Increasing collaboration between NHS Digital, NHS England and supplier teams was key to achieving tight delivery timeframes.

As we scale, we maintain a mindset of continuous improvement to ensure all process changes are delivering the intended value effectively. Communication is key at this stage and we ensure stakeholders are engaged throughout, receive training and support as needed, and understand their roles and responsibilities in the new processes.

Case Study

The NHS identified that there were significant pain points in the online consultation booking process that affected the customer experience and ultimately the accessibility and health outcomes they were trying to achieve. They required an online solution that integrates online consultations within an ever-changing technological environment, while creating a seamless customer experience for a wide range of stakeholders.

Clarasys was brought in to define and shape an end-to-end customer journey that would provide a significantly improved experience and deliver the desired business outcomes that we shaped alongside the NHS. We started by understanding the as-is process that the NHS was using, targeting pain points across user experience and business efficiency. Following a user-centric approach, we created a to-be model that removed inefficiencies, ensured scalability, and provided an improved user experience across a broad set of personas. Following a development period where we collaborated with an external development team to enhance functionality, we carried out 10+ rounds of usability testing, ensuring we were achieving our predicted outcomes before launching to 30m+ users on the NHS app.

Our improvements reduced pain points across the booking experience and therefore created a significant process improvement that benefited both the NHS and the end users. We were able to demonstrate tangible benefits within an 8-week engagement, as well as helping the NHS continue the improvements following our engagement by providing a detailed next-step recommendation set.

Delivery Management

We instil the collaborative culture, leadership and overall control your digital products, services and cloud programmes/projects require through effectively sizing, shaping, and managing delivery. Our delivery management experts maintain high levels of team cohesion and a constant focus on realising benefits and intended outcomes whilst delivering at pace.

In the last 14 years, Clarasys has delivered 100+ delivery management projects across Government, not-for-profit organisations and private industries. Our experience in government spans multiple departments such as His Majesty's Prison and Probation Services (HMPPS), Home Office, His Majesty's Court and Tribunal Services (HMCTS), Department for Environment, Food & Rural Affairs (DEFRA) and Department for Business, Energy and Industrial Strategy (BEIS).

Our delivery management consultants take accountability for the successful delivery of your digital products, cloud-based services, projects and programmes. Our consultants bring a range of traditional and agile certifications to drive successful delivery including Scaled Agile Framework (SAFe), Certified Scrum Master (CSM), Large Scale Scrum (LeSS) to meet your organisation's needs. We select the most appropriate delivery methods and create an environment that drives results whilst promoting continual learning processes across your project.

We form close relationships with key stakeholders, ensuring they are engaged in the delivery and governance processes of the product, service, project and programme. We always strive to establish a culture of transparency and openness and our delivery managers will achieve this by agreeing communication ways of working to ensure this is at the right level for you.

We understand that delivery success is only partly dependent on developing and executing on a clear plan. Our consultants will therefore flex and adapt their styles to your needs along the way, to respond to what we learn and to ensure the highest-value items are being worked on. This supports effective collaboration, decision-making and risk management through timely surfacing of the right information, at the right time.

Our approach

1. Define

When we start, we work with project/programme sponsors (e.g. Senior Responsible Officers), key stakeholders, and the existing project team to first define what success looks like (i.e. the vision) and project outcomes. We will define suitable timelines, milestones, reporting, dependencies, assumptions, governance, and day-to-day working patterns to enable effective delivery.

We are adept in Waterfall and hybrid agile delivery environments and flex our delivery management approach to the needs of your organisation and your delivery teams. We will work with senior leaders to embed effective delivery best practice within your organisations through coaching and upskilling. We can also provide delivery managers to your multidisciplinary teams as part of a flexible resourcing model which we can scale up and down given your demands

In the Define phase, we lead collaborative planning processes with your teams ensuring that work is prioritised with consideration of perspectives from product management, user-centred design and architecture. This creates product roadmaps and delivery plans that provide direction and clarity on how the team will deliver on a strategy. From this, we set out the Agile ceremonies that will get us to each critical point within the roadmap (sprint planning, backlog grooming, sprint demos, retrospectives). We will outline the roles, responsibilities, inputs and outputs of each session to ensure accountability and greater transparency within the project team during the delivery of the project.

Our delivery managers take responsibility for the quality of the products their teams create, ensuring that they are built to the appropriate quality for each stage of delivery (e.g. alpha, beta, live, retirement) and the team can progress smoothly through assurance processes. We will define and design how the delivery team will feed into your wider governance (project management office, product portfolio), department reporting (e.g. technical design authority, finance committees) as well as being prepared for any oversight by assurance bodies like the Central Digital and Data Office (CDDO) or Infrastructure and Projects Authority (IPA).

At NHS Digital the organisation saw an opportunity to better address an emerging public health crisis of people engaging with their own health and wellbeing too late to prevent long-term illnesses. Clarasys provided delivery management capability to create collaboration between multiple stakeholders across Healthcare to explore the issue. Through our agile delivery practices we managed the development of ideation and prototyping solutions to the challenge. We iterated on how web and app-based tools in one place could encourage innovation, support consumer choice, and reduce future health service costs. We derived roadmaps to take this concept into alpha and beta phases, which set out the long-term vision for wellness & prevention for NHSX.

2. Enable

Once the delivery team and project structure has been set up, our delivery management consultants will monitor and balance resources, budgets, competing and incoming priorities alongside key timelines. This will be done through key ceremonies linked to road mapping and sprint planning as well as regular reporting and status updates. Our delivery managers will estimate demand and ensure the right skills and capabilities are available to deliver the work. This includes managing third

parties to ensure that there are good working relationships and that all team members have a 'one-team' mindset through regular alignment and collaboration sessions.

To enable successful teams our delivery managers set outcome-based goals for each sprint to empower the delivery team to be autonomous and have a clear vision in what we are trying to achieve. They will size the effort required to reach the goals and track the velocity in which outcomes are achieved through reporting, like burndown charts.

Through open and honest retrospectives every sprint, we will create a psychologically safe environment where team members have more influence over decision-making and responsibility for their work. The goal is to get the best out of people by building an engaging and energetic atmosphere that is focussed, encouraging, and makes space for innovation.

Amongst the delivery team, we ensure motivation and momentum is maintained throughout the project to hit its outcomes. We realise this by creating feedback loops (e.g. sprint demos) for the team to demonstrate and get feedback on their work from those it will impact. Positive and constructive feedback is requested to enable an appetite for continuous improvement. To maintain momentum delivery managers will take ownership to proactively unblock delivery issues and raise and manage risks and issues on behalf of the team, allowing them to have greater focus on delivery and doing what they do well. They will also create Scrum of Scrum meetings amongst other closely related delivery teams to discuss blockers, interactions with common platforms for testing and support release management.

At NHS Trace the organisation was tasked with providing a service and physical products to support the national Covid response. Clarasys provided delivery management to support through an Agile delivery approach. We enabled the organisation by effectively shaping and sizing user stories that would improve the service. Improvement options were presented and prioritised in roadmaps with the development team. Delivery was managed across a cross-functional team through agile ceremonies to lead to improved all-around experiences for citizens with shorter digital journeys and increased access to vital products in the effort against COVID-19.

3. Embed

Throughout our delivery management, from day 1, our approach will introduce collaborative, transparent, iterative, and Minimum Viable product-driven ways of working to those that interact with it. Our consultants listen, coach and support stakeholders across all levels as a critical part of managing the project. We will create a blueprint for how to deliver in this way; sharing our knowledge and working practices within your government department, building up reusable templates so your

civil servants can collaborate and deploy the practices themselves long after we have left your organisation.

At the Home Office we worked with the central Digital, Data and Technology (DDaT) team within a cross-department transformation programme (One Home Office) to drive adoption of product and delivery management-centric ways of working across the organisation. We engaged over 100 stakeholders using show & tells, interviews and drop-in sessions to develop the organisation's capabilities. This built civil servant capability by introducing new ways of working (sprints, backlog prioritisation) and providing 1:1 coaching for key roles (e.g. delivery manager).

Case study

We led the delivery management within the Contact Tracing Advice Services during the COVID-19 pandemic. We were able to support the UK Health Security Agency (UKHSA) by providing continuous, rapid updates to its contact tracing product during the COVID-19 pandemic. UKHSA required a comprehensive national service at a previously unprecedented scale that could function within a rapidly developing context and according to the disparate needs of citizens, call centre agents, local authorities, operational, and clinical teams.

There were limited insights, designs, user needs, roadmaps and solutions - while there was an urgent need to build a modular and scalable service that could evolve with the changing needs of devolved administrations and new scenarios. Our priorities were to create adaptable solutions that delivered user needs and policy compliance. We evaluated over 280 policy changes in 2021 and met these changes with user experience and healthcare standards at the forefront of all decisions.

Through our agile delivery management we introduced rapid and iterative ways of working, deploying product roadmaps, user story maps and iterative service designs to show how the underlying service would evolve and worked with delivery teams to ensure the service delivered the desired outcomes. This led to successful, on-time launch of national services, allowing UKHSA to facilitate over 20 million public interactions through shorter digital journeys, with an improved all-round experience for citizens and consolidation of disparate services into one universal offering.

Data Governance

We live in an increasingly data-driven world where effective, proactive management and governance of data is key to organisational success. We have the experience to analyse, measure, and improve your organisational data maturity, governance and ability to turn this into actionable insights to meet business outcomes.

We have 14+ years experience delivering 130+ complex data and analytics projects across Government, not-for-profit and private sectors applying data governance principles to improve the way in which organisations gain value from their data. Our consultants undergo comprehensive training in data governance and management so that they are equipped with the tools to implement and instil data governance. Moreover, we have over 15+ data governance experts, skilled in advanced data analytics, data visualisation and business intelligence (BI) for cloud-based applications. Together, with a comprehensive understanding of the latest in AI innovations, we help to ensure proactive data governance that flexes to the evolving needs of citizens.

Our team places huge importance on data governance in healthcare settings. We appreciate the fact that 'Data saves lives' but still patient information needs protecting. We are knowledgeable on NHS England's information governance processes and standards and as a supplier the obligations we have to treat patient data with utmost integrity and protection. The same applies for how we approach government healthcare needing to manage data alongside AI, as outlined in the NHS regulations for AI and Digital Technology in Health and Social Care. We help you manage data across the right tools and technology whilst maintaining ethics and quality to a high standard for patients, clinicians, and other healthcare staff. This approach ensures our data governance strategies comply with industry standards and are customised to meet government organisation needs, promoting evidence-based policy making and enhancing public service delivery.

Our approach

Our tried and tested 3 phase data governance approach uniquely looks at how and where data assets are used, governed and managed, not only within teams but within and across government organisations.

We understand the complexity of operating across organisational boundaries and delivering successfully within existing governance and therefore build, test and embed data governance principles incrementally (targeting specific teams or stakeholders that work together to deliver a single customer journey or slice of functionality). This agile approach enables the organic growth and spread of data governance capabilities and adoption amongst civil servants.

We assess data needs against intended organisational goals and using a data governance maturity assessment, create a clear roadmap with recommendations to improve data maturity.

Throughout the data governance maturity journey, we ensure that stakeholders understand the benefits that more effective data management can drive. Using change management techniques, we aim to foster a data-driven culture among civil servants, where they understand the importance of data in decision-making and actively participate in its management.

1. Analysing your current data landscape

The first phase involves running discovery workshops with stakeholders to understand the current architecture, as-is data processes, your data ambitions and guiding principles, aligned to the National Data Strategy. This assessment, conducted by our team of skilled business and data analysts will help us understand:

- How data is gathered, stored and shared across government organisations
- Who the data is owned by
- Where common data sets are shared across government organisations
- What, if any governance principles are in place to safeguard data management such as data access and sharing controls, data privacy rules, GDPR and NCSC regulatory and compliance standards
- Existing data-related pain points
- Adherence to ethical data principles

This input is used to map out as-is processes using process mapping tools such as BusinessOptix and Visio and create a logical data model. We utilise techniques including interviews and surveys to not only understand civil servants' sentiment towards data management but to gauge the level of data literacy.

We took this comprehensive approach to data analysis at His Majesty's Prison and Probation Services (HMPPS) where we spearheaded the data collection and analysis for the HMPPS Reduce Reoffending Programme. Using data collection techniques such as workshops, job shadowing and interviews, we examined over 21 data points for 1600+ prisoners, providing HMPPS with insight of HMP Wandsworth's remand population.

2. Understand your data quality, measure your current data governance maturity and define your data maturity roadmap

Figure 8: Data governance approach



Data governance roadmap

Level 0: None	Level 1: Initial	Level 2: Managed	Level 3: Defined	Level 4: Service	Level 5: Optimized
No processes or dedicated data team	Manual processes, ad-hoc improvements	Some automation and scheduled processes	Standardised process to improve data	Strategic business goals	Governance and data driven processes
Ad hoc support to	Data support:	Data development:	Data stewardship:	Data integration:	Enterprise data mgmt
• Prioritise needs • Identify appetite for data governance • Establish high level vision	• Define vision and KPIs • Implementation plan • Define entity scope • Data standards • Create comms plan	• Create roadmap • Establish comms channel • Train on data standards • Identify tools to support quality	• Cross Department roadmap • Prioritise entities • Ongoing quality improvement • Enforce data standards	• Identify need for a new enterprise wide governance • Expand entity scope • Automated dashboards to monitor KPIs	• Establish enterprise wide management

The next phase is understanding your existing data quality. To do this, we use a data quality scorecard and apply these metrics to a sample dataset to determine its quality and understand the data cleansing efforts required. The metrics include accuracy, recency, completeness, conformity and duplication.

At St John Ambulance, we were tasked with helping them ascertain the quality of their HR data to understand whether data was a true representation of their volunteer pipeline. We conducted a thorough HR data quality assessment using our data quality scorecard and fed the output into an interactive data quality dashboard. This enabled them to identify and rectify data quality issues that would ensure the successful deployment of 25000+ volunteers for the NHS COVID vaccination programme.

We then conduct a rigorous data governance maturity assessment against five dimensions - people, standards, policies, technology and reporting. Within each dimension, there are 6 levels of maturity. Using our understanding of the as-is landscape and further interviews, each dimension is measured and mapped to the relevant maturity level. Our assessment's detailed insights highlight key maturity gaps tied to strategic risks, direct attention to areas needing targeted action and investment, and identify necessary data foundations for launching new services and initiatives. An overall maturity score is provided across all the dimensions which informs our roadmap and recommendations.

We produce a strategic roadmap that sets out the path for government organisations to raise its maturity. It includes high-level recommendations on how areas of improvement can be addressed to ensure effective, safe and secure data management.

3. Implement and monitor data governance

Using the data governance maturity assessment output, we will build a tailored governance toolkit to ensure teams are equipped with the appropriate templates needed to enforce sustainable data management.

For this toolkit, we have a set of tried and tested data governance interventions that can be applied based on the findings of our assessment. The toolkit offers governance monitoring tools like data quality dashboards, scorecards, user guides, data attribute definitions, rules and privacy policies. It aids continuous improvement with high-level KPIs to track data governance performance.

We will partner with you to design a bespoke data governance model including data ownership definition for core data roles that will drive overall data management and a data stewardship model to champion and role model data-driven mindsets. As part of our commitment to knowledge sharing and upskilling, we provide comprehensive training on data governance best practices for civil servants to improve data literacy and embed a data-driven culture.

This proved successful when we implemented data governance at HMPPS for their new electronic monitoring service, introducing GPS tags that gather sensitive offender data. Through job shadowing, interviews and workshops with stakeholders including policy teams, legal advisers, and service suppliers, we identified data requiring routine access and data requiring appropriate justification. We established principles through system controls, defining requirements, and operational processes, creating guidance and training material for stakeholders. This provided clarity across stakeholders and ensured data security for HMPPS. The operational monitoring service, developed in 6 months, securely and compliantly monitored about 2,500 individuals within the first 18 months of going live.

Case Study

St John Ambulance struggled to understand its volunteer-base, quantify costs or measure impact due to limited data operationalisation capabilities which led to uninformed decision-making and cost-inefficiencies. We were tasked with helping them to develop a sustainable, actionable data strategy and the underpinning data governance framework. We conducted interviews with 50+ stakeholders from various roles and levels to assess data maturity against Clarasys Data Strategy Dimensions: Vision & Values, People, Reporting, Technology, Governance/Processes/Policies. We converted findings into recommended programmes, aligned with digital transformation outputs, structuring them in a measurable format to elevate data maturity above market benchmarks.

We established a data governance framework which included a data ownership model, outlining holistic data roles and responsibilities, recommended governance forum structures and cadence and a data quality scoring and cleansing approach to ensure continuous data management.

This provided St John Ambulance with a comprehensive understanding of the current data landscape, future solutions architecture and based on their priority needs, the changes required to improve data maturity. The new data governance framework aided their 1700+ employees to more effectively manage over 10 million+ data records and uncover true actionable insights from high-quality data.

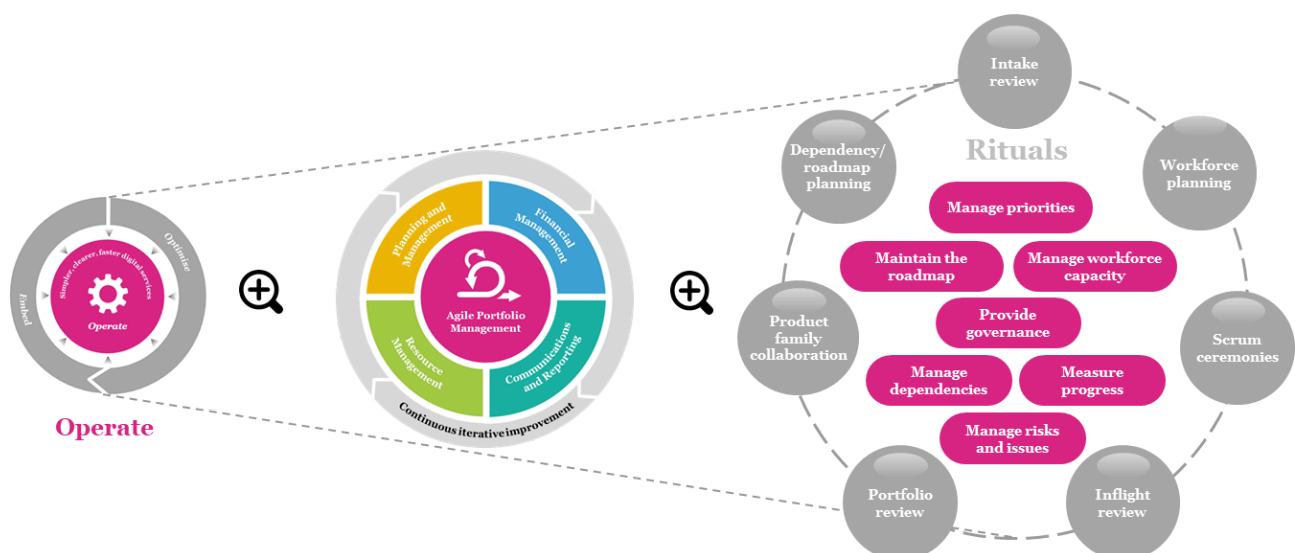
Portfolio Management

Our flexible portfolio management approach enables departments to rapidly align projects, programmes and programmes to strategic objectives and unlock value from delivery earlier.

We tailor our portfolio management approach based on your needs. We work with senior leaders to embed portfolio thinking within your organisation to ensure your organisation's resources for key programmes and products are consistently aligned to your overarching strategy and deliver the most value. We can also provide portfolio experts ranging from portfolio directors, portfolio managers, portfolio analysts and other portfolio roles to supplement your internal teams as part of a flexible resourcing model which can scale up and down given your evolving demands.

We take a pragmatic approach (outlined below - Figure 9) drawn from 10+ years of portfolio management experience across a range of public and private sector clients including the Ministry of Justice, Informa and St John's Ambulance. This includes standing up new portfolio functions, establishing new demand management processes, building consensus amongst leaders in the value of portfolios and driving greater data-led decision-making as part of prioritisation and sequencing discussions to transform delivery.

Figure 9: Our portfolio management approach



Our approach

Our portfolio management approach provides a comprehensive, organisation-wide understanding of where you are focusing your efforts, what outcomes are being delivered and when, alongside a clear view of how this will impact your stakeholders. Additionally, our approach fosters a culture of continuous engagement, using feedback from stakeholders throughout to drive action and iterative improvements to the portfolio itself.

1. Understand the challenge

Many government departments and agencies have a substantial number of policy areas to deliver on and with that, comes a series of portfolio challenges of aligning their limited resources (budgets, civil servant resource capacity and organisational focus) on achieving these. To help address this, we start by understanding the overarching vision for the organisation and the unique challenges you are facing in realising your goals. For example, some common themes include prioritising resources, driving alignment across key tranches of delivery (major projects, critical national infrastructure, citizen-facing services, digital products).

We will carry out a rapid discovery across a series of levers (including processes, people, projects, policies, information alongside leadership and culture) and work with you to agree what kind of portfolio organisation you require based on what you are aiming to achieve. For example, this could take the form of a more directive portfolio which is more hands-on with the delivery of projects (supplementing delivery team capacity) versus a more enabling portfolio function which uses key performance indicators (KPIs) and coaching to upskill sponsors and delivery teams.

As part of this rapid discovery, we will undertake a capability assessment that will look at the current state of your portfolio management function and understand the main gaps and requirements required to support your goals. If you do not have a portfolio function currently we will look at your current programme delivery set up and map against our portfolio management capability model, ensuring that we have a clear view of what you currently do. We then look to understand how this interacts with the rest of the delivery organisation, ensuring that the portfolio model we implement will support the goals of your organisation.

At the Ministry of Justice's Digital Prisons Service they needed to establish and embed a new portfolio delivery operations function for the first time. Clarasys brought in our expertise to show the art of the possible for effective portfolio management. We then worked with senior management and delivery teams through a set of visioning workshops to outline what outcomes were wanted from an effective portfolio structure and through this we collaboratively defined the foundational processes and governance to put in place to deliver on the vision and assessed the current capabilities to fulfil the portfolio structure giving MoJ an understanding of the resourcing required to move forward.

2. Design and establish effective portfolio structures

We employ an iterative approach, rapidly designing and building effective portfolio structures and processes over time to secure stakeholder buy-in by demonstrating the value of each element (i.e. demand management, portfolio operations) and iterating based on continuous stakeholder feedback. Based on the outcome of the portfolio capability assessment, we design a target portfolio management structure, including aspects like; demand management approach, prioritisation approach, robust reporting structures, and portfolio roadmap and planning approaches. We will also define an implementation plan for the target state, recognising that all changes cannot be implemented all at once. The method of delivery (agile, waterfall etc.) should be a consideration when looking at delivering a target structure. We will support you to design terms of reference and agree portfolio principles (e.g. procuring off-the-shelf technology, ensuring all products are user-centred). A key decision required will be if the portfolio will have budgetary and investment funding control, which will impact how the portfolio will interact with the rest of the organisation. Before implementing any changes, we will test these within your organisation with a representative group (i.e. user forum, service owners, senior responsible officers). This helps to gain buy-in and identify where changes need to be tweaked ahead of being scaled.

A leading business intelligence provider was struggling to manage the demand for internal change projects and programmes. There was no clear, singular pipeline of demand to allow for clear planning, resourcing and prioritisation. Clarasys helped to establish a new Demand Management process and Portfolio Management team. Working with IT, business services and commercial teams we gathered pain points of existing ways of working and collaboratively designed a new demand management process to address these pain points and gaps. This created clear visibility and enabled prioritisation of £10 million plus pipeline of strategic initiatives and through regular feedback and process iteration, reduced time for teams to ideate, design and assess the impacts of projects.

3. Implement, embed and iterate

We will work with you to implement the roadmap to move towards the defined portfolio structure. This follows the roadmap defined in Phase 2 and is specific to your organisation's readiness to adopt the new structure. When implementing, we will trial changes within a team without the portfolio in a test-and-learn phase to ensure that the change works for the organisation. We will start with the highest priority changes and then implement the rest of the target structure based on feedback from the team on how the implementation is going.

As the structure is being implemented, we will provide portfolio managers (if required) to model the way of the change. This includes driving new processes, ensuring that

the right data is being collected, and running the governance sessions in accordance with the new terms of reference (e.g. ensuring all information required for demand management is provided correctly and that the demand management session runs smoothly taking the correct approach for each item).

We will upskill your team members on the new ways of working, ensuring that the appropriate documentation is in place. We also run drop-in sessions and collect extensive feedback from affected stakeholders to ensure that the implemented ways of working and governance are effective in the environment and we continue to make incremental improvements based on feedback. To embed the new portfolio structures, we can provide portfolio managers to augment your team as part of a flexible resourcing model which can be scaled up or down given your demands, ensuring you have the right support.

Following a divestiture from Thomson Reuters, Refinitiv, had a maximum period of 24 months to deploy an independent organisation. The Data, Analytics and AI group was a newly formed team within Refinitiv with the challenge to understand the existing data landscape, agree a separation strategy for each element, and deliver the changes. Through upskilling staff and providing our own portfolio management experts we supported and managed a \$40m portfolio of digital business change projects for Refinitiv, within this newly established Data, Analytics and AI department. We applied lean portfolio management practices and established standard approaches to business case creation, prioritisation, demand management and procurement. The team mobilised projects, managed interdependencies and tracked benefits. We helped form a responsive and agile organisation to deliver a large portfolio quickly and on time, mitigating risks and issues to project delivery.

Case study

NHS Trace was tasked with providing a digital service and products to support the national Covid response. There was an urgent need to build a modular and scalable service that could evolve with the changing needs of the service. Requests came from the main service and devolved administrations such as; new scenarios, and new user needs, designs and technical solutions.

The department was struggling to manage the portfolio of product requests, as there was a lack of alignment on the target architecture resulting in inefficiencies, and no clear, singular pipeline of demand to allow for clear planning, resourcing and prioritisation.

In order to effectively manage the portfolio of digital products and services, and their respective feedback requests, we built a front-end demand management process which prioritised and filtered incoming requests for product and delivery teams to ensure that the cross-functional teams could collaboratively address pain points and gaps in a timely manner. This enabled the successful delivery of the project through creating clear visibility and prioritisation methods of strategic initiatives, as well as proactive measures to remove roadblocks from delivery of initiatives.

Patient and Clinician Experience

We design and lead patient and clinician-facing services that are accessible, usable, compliant and efficient. Our user-centred design experts use innovative tools (AI) to streamline and automate operational processes and improve how citizens can contact and engage with government services.

As a consulting firm with public sector expertise, we recognise the importance of catering to diverse citizen populations with varying needs and preferences. This is particularly key when assessing the range of engagement channels used by patients to interact with government health services and request support. We have deep experience helping organisations define customer engagement channel strategies that meet users needs and leverage the latest artificial intelligence (AI) technologies - including Natural Language Processing (NLP) and Generative AI.

Given budgetary pressures within health and social care, our solutions help organisations do more with less, improving service quality and the experience of users despite limited resources. Solutions that we facilitate the delivery of, allow for an exceptional quality of user experience, without the need to invest heavily to recruit additional permanent staff members.

Understanding evolving patient and clinician behaviours, preferences and expectations is paramount, such as the need for self-service and smooth engagement across different and emerging channels. We ensure integrated contact channels are delivered seamlessly - allowing effortless handovers between virtual assistant, phone, email and various other channels.

We recognise the need for scalability and agility in response to national events - meaning that new service types need to be quickly stood-up or existing services need to be changed quickly. We utilise tools and solutions which are more scalable and adaptable than most other AI support options on the market - making it fast, cheap and effective to evolve the service as needed.

We acknowledge the importance of regulation and compliance in the public sector, offering solutions that provide enhanced control over the interactions with users while meeting heightened service expectations.

Finally, we understand that the data security requirements when delivering citizen services are fundamental to enabling trust and ensuring that critical data is protected. Our solutions consider ISO standards and allow organisations to have full confidence that the user data has been secured.

Our approach

Our tried and tested 4 phase approach covering the lifecycle of patient and clinician experience, including initial discovery, definition and build of potential solutions with user testing and validation, followed by launch and ongoing iteration of citizen-facing services.

1. Discover

Assess the current situation and customer strategy to identify the best channel interventions and tools. We will segment and prioritise customers and use-cases, and evaluate service quality. Drawing from our experience with our private sector clients, we aim to improve the customer experience by understanding unique patient needs, optimising business scenarios, and enhancing service quality.

Existing customer interaction data will be examined, including quantitative volumetrics data detailing the volume of interactions across channels such as calls, emails, chats, and social media. Unstructured text and voice data from past interactions will also be analysed to identify customer behaviour patterns. This information can guide channel strategies, streamline processes and enhance the customer experience.

2. Define & Build

By prioritising specific channels like chatbots, social media, and email, and focusing on key interaction drivers such as frequently asked questions (FAQs), personalised recommendations, and user support, we can identify user segments that will benefit most. Pilot models combining Natural Language Processing and Generative AI will be created for live implementation, allowing for testing, iteration, and user feedback to ensure an effective, personalised user experience.

3. Launch

A launch plan for priority use cases will be established, including a timeline, final tests, and validation, in addition to incorporating user research and design. Both internal and external users will be effectively prepared through briefings, training, and communication channels. Success will be determined through set goals derived from customer and prospect experiences, considering both internal and external viewpoints. Key performance indicators will be monitored during the launch to evaluate effectiveness and make necessary adjustments. This plan is crucial for validating the use cases' impact, ensuring a successful rollout.

The launch of the new product requires diligent management and thorough preparation. This includes coordinating a large team, conducting comprehensive

research, and designing user-centric workflows. External users will gain access to new content, while internal patients' feedback will improve the system. The launch necessitates effective leadership, strategic planning, and adaptable design thinking. Existing colleagues will be trained to manage the service, with their needs identified through a business readiness assessment. They will also contribute to the development process. The project team will work closely with internal teams to equip them with the necessary skills for lasting change.

Post-launch, we plan to explore new uses for the product. We will conduct market research to identify new target demographics and adjust our marketing accordingly. By understanding diverse industry needs and gathering ongoing customer feedback, we will continuously improve our product. Our goal is a versatile product that benefits a wide range of customers, driving sustainable growth.

4. Iterate

The team will gather data from various sources like websites, chat/phone talks, and surveys to understand their target audience and market trends. This information will inform health and social care strategies, decisions on product development, marketing, health service initiatives, and more.

We will identify and prioritise future use cases crucial for product expansion, based on current implementation and projected usage. This involves business readiness assessments, iterative reviews with stakeholders, and market engagement for cost estimates. We will create an implementation plan detailing timelines, priorities, and resources. Tailored communication and training programs will ensure smooth integration of new features. We will also work with your internal teams, creating champions for the transition.

The next phase in the service's development involves identifying and prioritising new use cases through market research and customer feedback. These will be evaluated based on customer satisfaction, revenue potential, and competitive advantage. The most promising will be implemented, with a clear development roadmap. This collaborative process across teams will focus on delivering solutions that meet customer needs and drive service growth.

Case Study

iOtua, an innovative healthtech start-up, was looking to provide an AI tool that could automate the heavily manual NHS telephony appointment booking system using outbound calling and booking cloud software. Building on our specialism in customer and citizen experience, we worked with Otua to design and pilot an AI outbound call assistant that supports appointment booking and management for NHS Trusts.

Through running stakeholder workshops and process-mapping sessions, we gained an understanding of the as-is booking journey, data quality issues and the real-world pain points for patients and booking staff. This informed the design of citizen-facing conversations: clear, accessible call flows that gave patients a genuine choice of appointment slots, and built in safe routes to human support for more complex needs. The pilot was structured around citizen-experience principles such as patient-centric innovation, measurable impact, continuous learning from data and feedback, and automation with appropriate human oversight.

We shaped and supported a three-phase pilot in Glenfield Cardiology, gradually expanding booking types and volumes while protecting staff capacity, and then prepared the pathway for business-as-usual use by the bookings team.

We ensured that robust governance and deployment structures were put in place, including a repeatable six-week per-department model (Discover, Design, Deploy, Embed) and a stage-gate framework with clear exit criteria, enabling citizen-facing automation to scale safely across the Trust while staying aligned to the wider patient access and digital strategy.

Through this work, Clarasys demonstrated how experience-led service design can turn a point AI solution into a scalable citizen-facing service. By grounding design in patient needs, co-creating new ways of working with booking staff, and putting robust governance and deployment patterns around the technology, we helped Otua and the Trust deliver a more reliable, choice-led booking experience, while freeing up clinical and administrative capacity.

Capabilities

Figure 10: Our Capabilities



Experience Design

At Clarasys, we are the 'Experience Consultancy', and everything we do focuses on building towards end-to-end experiences that can delight users whether they are citizens or civil servants. Our knowledge of user research practices and service design principles, helps us to understand the end-user for a given process and assess the organisational structures that work to deliver the end-to-end experiences that will delight the user. We are experts in experience visioning and mapping exercises, and in analysing operational impacts which can all come together to maximise the value to users and create unforgettable experiences. We are trialling innovative tools in the AI research and visualisation space which will continue to enhance our experience design expertise.

Business Analysis

We are business analysis experts, who specialise in bridging the gap between business functions and technology to drive towards more effective decision-making. We are experienced across multiple methodologies and techniques including Lean Six Sigma, Agile, and Total Quality Management (TQM). We work with government organisations to map out processes, identify areas for improvements, to ensure that your organisation is operating at its optimal capacity, and civil servants have the supporting infrastructure they need. We utilise leading data visualisation and process modelling tools like BusinessOptix in order to bring our business analysis to life.

Agile Delivery

Our Agile expertise underpins everything that we do. We are experts in a wide array of techniques, including Scaled Agile Framework (SAFe), Certified Scrum Master (CSM), Large Scale Scrum (LeSS)), as well as in applying our own bespoke agile methodology to a variety of policy, operational and digital challenges faced by government organisations. We offer an iterative approach which centres on the end-user in order to produce the most impactful result for the organisation at large.

Business Architecture and Strategy

We help government agencies conquer their aspirations and navigate critical strategic, operational, and governance decisions. We are experienced in crafting the change needed to address the relationships between your business architecture, technology, and people through a multi-faceted approach including research and industry analysis, strategy development, business case definition, and architectural analysis and design.

Data Analytics and AI

We leverage cutting-edge technologies such as PowerBI, DOMO, Google Analytics and approved AI tools to generate data-driven, actionable insights that drive tangible business outcomes. Whether through governance and management or analysis and modelling, we are equipped to help your organisation make the most of the data it has so you can function optimally. Our use of AI is governed by a clear policy that ensures any data is protected by robust contractual and organisational controls, including agreements that prevent data from being used to train AI models and policies for zero-day data retention. While our teams may use other AI tools for general productivity, we strictly prohibit their use with any of your data.

We take an “AI First, Human-Led” approach to accelerate delivery, allowing our teams to focus on high-value activities while ensuring that human expertise remains central to quality and decision-making. We will begin by understanding individual and organisational needs, then integrating core tools and gradually introducing role-specific and complementary solutions as appropriate. We are experienced in coaching and upskilling government employees on leading technology solutions, including training civil servants to apply AI tools safely and effectively to enhance government services.

Consulting Excellence

As consultants, we are always looking for ways to improve, and to elevate the outcomes that we can provide. As an organisation, we engage in continual training and learnings to cultivate the problem solving, communication, leadership, and stylistic skills that underpin all of our work. This continual learning process helps us to ensure we are continually providing value to our clients, and our consultant skill sets do not remain stagnant over the course of an engagement. As an organisation, our priorities are delivering excellence and continually innovating. We prioritise transparent communications, iterative methods,

and clearly defined ways of working to ensure that we are generating the best results we can.

Sustainability

Sustainability is more than just one of our capabilities, it underpins all of our projects. Whether it is building carbon efficiency analysis into our digital product development or incorporating sustainability concepts into end-to-end supply chains, we deliver projects that focus on transforming organisations, products, and services to meet planetary and societal needs. We are experienced in defining and measuring purpose and impact, calculating and cutting carbon emissions, and building circular business models.

Clarasys also operates a certified Environmental Management System (EMS) in accordance with ISO 14001, covering the environmental aspects and impacts of our consulting activities and operations. This certification demonstrates our ongoing commitment to environmental protection, compliance with relevant obligations, and continual improvement in sustainability performance.

Domain Knowledge

Our business acumen and experience of working across government departments, agencies and public bodies enables us to deftly navigate complex governmental structures, policies, and processes. We excel in navigating intricate regulatory frameworks, implementing effective strategies and policy decisions, and delivering innovative solutions tailored to the unique needs of public institutions. Our previous engagements have sharpened both our knowledge of government operating practices and our ability to provide targeted strategies, design innovative approaches, and implement compliant frameworks to enhance core operational products and citizen-centric services.

Technology

We employ a technology-agnostic approach to assessing, designing, and evaluating services for government organisations. We are experts in solution architecture design, enterprise technology architecture design, implementing digital-first strategies and cultures, and in assessing vendors to ensure you have the right technology supporting your organisation. We are able to support civil servants across a wide array of platforms and products in alignment with the Tech Code of Practice, and are experienced in managing technology in alignment with Government Digital Service (GDS) best practice and Central Digital and Data Office (CDDO) standards. We are passionate about building sustainable products and services, and our practitioners are eager to learn and apply innovative approaches such as Low Code or No Code which can transform the processes used by civil servants and improve outcomes for citizens.

Employee Engagement

Since 2011, we have helped our clients become people-experience-led organisations to improve their employee experience, reduce churn and increase productivity, through our employee engagement approach. One of the biggest barriers to successfully doing this is understanding the root causes of employee friction, and getting the business buy-in to make real change. We help organisations overcome this through establishing a continuous loop of identifying the friction within the organisation, understanding the practices or behaviours that are causing it, designing and implementing the actions to improve this for employees, and measuring if this has been successful. This includes implementing employee engagement platforms to improve transparency and monitor employee sentiment (including partnerships with organisations such as Workvivo), and helping organisations adopt more progressive ways of working to increase autonomy and trust. We are involved with several inspiring communities that are collectively pushing employee experience thinking forward including a partnership with Corporate Rebels and chair their UK community of progressive organisations. In this, leading organisations from High Street banks to disruptive start-ups, come together to share their successes and challenges with adopting more progressive ways of working, and act as a peer group to help other organisations design experiments to address employee frictions within their own organisations.

Working with Clarasys

Clarasys prioritises a collaborative, transparent, and continuous approach towards our resourcing process which aims to ensure the government departments we work with get the right person to address the right challenge. We work quickly to bring consultants onboard to projects, with consultants typically ready to start within three days of a new sourcing request being made as shown in Figure 11. For Clarasys, resourcing is not a one-off mechanism but rather works best as a continuous process that ensures value is being provided throughout the project.

Figure 11: Our sourcing approach



In the event that we are selected to work with you under G-Cloud 15 (following the standstill period and contract award), we will work directly with the relevant contract owner, commercial team representative and other key senior stakeholders (senior responsible officer, statement of work lead) to discuss your resource needs. We do this in conjunction with our internal scheduling process to understand any role-specific requirements including in-person working requirements, location, future demand, and specialist capabilities required and adjust resourcing accordingly. To further this goal, we will host a “best-fit” meeting to identify and resource the candidate with the most appropriate profile.

Our scheduling process prioritises our commitment to deliver by maintaining continuity of consultants and ensuring that key staff are retained on this contract where possible. We have adopted internal resourcing strategies to expedite our process such as capability and certification tagging, which enable us to quickly identify which consultants fit the core needs of our clients. We also understand that team sizes and the need for specific skills and capabilities can change rapidly. We will proactively review the demand for resourcing throughout the duration of the contract to anticipate and identify the evolving needs of the programme and effectively respond when changes are required.

Ahead of the project start date, our tried and tested onboarding process will ensure our consultants have the appropriate clearance in place so they are ready to start on day one. Additionally, upon candidate confirmation, our resourcing lead will ensure the consultant

completes a bespoke booster course relevant to the work required including best practices for delivering within a clinical setting, research ethics standards, NHS digital service manual, and relevant ways of working specific to the particular organisation. During delivery we will proactively monitor quality at regular intervals using a variety of data points including and not limited to, net promoter score (NPS), customer satisfaction scores (CSAT) and statement of work (SOW) owner client feedback.

Security clearance

We pre-clear all our consultants going onto public sector and healthcare work to a minimum of BPSS clearance. Those identified as requiring higher clearance (SC, NPPV3, DV clearance etc) are able to apply for this via the client's organisation or through our external vetting procedure. Currently, we have more than 60 consultants with SC clearance across all SFIA levels. This tried and tested process enables us to accelerate the onboarding process to all our clients.

Internal Security policy

Beyond the scope of our clearances, Clarasys maintains a stringent, comprehensive, company-wide approach to our internal data security. We maintain CyberEssentials and CyberEssentials Plus compliance. Additionally, all members of our team are required to go through annual upskilling on maintaining GDPR and data protections courses.

Clarasys operates certified management systems for ISO 9001 (quality), ISO 14001 (environmental) and ISO 27001 (information security), providing a structured, independently audited framework for how we deliver work, manage our impacts and will protect your data. These certifications give assurance that we consistently meet defined requirements, manage risk and continually improve the way we run and govern projects, which in turn supports reliable, high-quality outcomes. We are also implementing an ISO 20000-1 service management system and are aiming to achieve certification by March 2026, further strengthening the reliability and consistency of our client-facing services.