

Service definition

Configuration, customisation and integration of cloud CRM systems



Introducing Great State

Digital experience for the next generation

Drawing on over two decades of public sector delivery, at Great State we understand that meaningful digital change comes from secure, scalable experiences built to perform under real-world pressure for real people.

As a proudly independent digital customer experience agency, we combine insight and understanding of audiences, with creative ambition and deep technical rigour to help government organisations have an impact and make a noticeable difference.

- **Public sector delivery:** creating secure, scalable digital products and services that perform under real-world pressure for citizens and frontline teams
- **Trusted by public sector organisations:** partnering with the Royal Navy, Ministry of Defence, British Army, London Fire Brigade and Office for Students (and more) to design, build and run mission-critical services across government frameworks
- **Experienced in GDS delivery:** programmes delivered to Government Digital Service standards (GDS) and Technology Code of Practice, operating within stringent security classifications and defence-grade environments
- **Cross discipline specialists:** across digital strategy, product innovation, experience design and engineering, from discovery and alpha through to large-scale platform builds, legacy and cloud integration, and team augmentation, we have everything covered
- **A 90-strong multidisciplinary team:** Across strategists, researchers, designers, engineers and delivery specialists using robust research, data and user testing so services succeed with purpose, not assumptions





Why Great State

Creating digital experiences that deliver measurable impact

- **For G-Cloud 15 buyers:** an experienced GDS partner that applies deep consumer insight and rigorous engineering to deliver intuitive, secure and scalable digital services that meet UK government standards, are fast to procure, and come to market at pace and scale
- **Experience-focused approach:** we design seamless end-to-end journeys, from first interaction to long-term adoption, reducing friction for users and improving satisfaction across every audience
- **One team with clients:** we embed agile ways of working, share knowledge and upskill your internal teams, leaving a lasting legacy of improved capability and high-performing digital products
- **Secure, scalable by design:** cloud architectures aligned to GDS security expectations, using leading enterprise platforms to protect sensitive data and reliably scale with public-sector demand
- **Digital experiences for the next generation:** we create digital experiences that don't just meet expectations – they exceed them, building lasting connections with the next generation





Clients usually come to us for these reasons

01

Experiences demanding *impact*

We design experiences that drive outcomes, engaging users while directly contributing to organisational goals. Every interaction is crafted to deliver both meaningful outcomes for people and measurable results for the business.

02

Robust thinking at *pace*

We apply intelligent thinking to complex challenges without slowing things down. Our thinking is based on insight so we can move from problem to solution with confidence.

03

Military grade *engineering*

Our technology solutions are built to the highest standards of security, scalability, and reliability. When clients need digital that won't let them down, they trust us to deliver with the discipline and precision of military-grade engineering.

04

Problems solved *collaboratively*

We work as one team with our clients - building a shared understanding, a single clear direction, and the right blend of skills. True collaboration is hard to achieve, but when it happens, solutions are found faster and with greater clarity.



Our clients

We have deep-rooted experience in public sector delivery, partnering with government organisations to design, build and run secure, scalable digital services that stand up to real-world pressures. Our experience spans a wider mix of sectors including public and private, culture and defence, education and energy, giving us the broad field of vision needed to spot patterns early and bring fresh, relevant thinking to every new challenge.

We use what we learn on one project to strengthen the next. By actively sharing knowledge across our multidisciplinary teams and with our clients, we ensure every partnership benefits from the best of what we have seen, tested and delivered.

Some partnerships begin with a single challenge. But most evolve into long-term relationships - built on trust, shared ambition, and a track record of meaningful results. We're proud of our long-standing client relationships.





01

Service description



Configuration, customisation and integration of cloud CRM systems

Service overview

This service provides technical discovery and consultancy, platform selection and procurement support, business process analysis, data migration, technical design, development, deployment, upgrade and on-going operational support of CRM systems in a cloud-based environment, including Microsoft Dynamics 365 and Salesforce, ensuring high levels of performance, availability, security and compliance are met.



Configuration, customisation and integration of cloud CRM systems

Detailed service description

Technical discovery

We require a detailed understanding of the physical and logical architecture of the components that support the service, reviewing all available documentation around key areas such as (but not limited to):

- Hosting infrastructure
- CMS platform
- CRM platform
- Output channels
- Third party systems / services
- Internal systems
- Databases
- Integration points

We seek to understand:

- Required compliance
- Access privileges
- Technical requirements (functional and non-functional)
- Internal IT involvement
- Known issues



Configuration, customisation and integration of cloud CRM systems

Detailed service description

CRM setup and configuration

Our team of specialist, certified CRM engineers will carry out detailed planning workshops, set-up and configure Microsoft Dynamic 365 or Salesforce Cloud, deploy the technical foundations and cloud hosting infrastructure for data collection and configure reporting to provide a comprehensive, scalable, secure CRM solution and a consolidated, centralised view of customer data to ensure personalised and consistent communications. This includes the following process:

- Project scope definition and requirements gathering
- Gap analysis and business requirements mapping
- CRM and data strategy definition
- CRM platform evaluation and procurement support
- Creation of detailed HLD and LLD documents (as appropriate) including logical and physical technical designs
- Define and implement data retention rules
- Data acquisition, aggregation and consolidation into corpus/single view of data
- Data audit and data cleansing
- Change management process definition and implementation
- Platform configuration
- Bi-directional integrations with supporting systems
- Email marketing and campaign creation and personalisation
- Project evaluation, analysis and ongoing support and optimisation



Configuration, customisation and integration of cloud CRM systems

Detailed service description

Development and systems integration

All applications and services we develop are based on industry best practices and standards, following W3C guidelines for accessibility and HTML 5 compliance.

We follow a 'lean' software and test-driven development approach, this helps to mitigate technical bottlenecks by focusing on smaller deliverables, shorter production cycles and continuous development and improvements to encourage focused and timely feedback.

We design our application to follow a SOLID object orientated architecture, establishing a clear separation of concerns, encapsulating business logic and eliminating interdependencies.

These processes ensure the code base is flexible, extensible, maintainable and testable to enable us to deliver updates quickly and efficiently in a cost-effective manner. Especially important when more significant changes to the application code base are required in the future to support the integration of new technologies, systems, services or replace legacy systems.

We utilise automated build and testing tools to ensure a well-structured and consistent release process to maintain output quality and mitigate risk of regression. In addition, we maintain daily stand-ups with the project team which are aimed at sharing knowledge, providing status updates, raising any ideas, issues and risks early, to resolve issues and prioritise the tasks for the day. This encourages the team to work in a positive, engaged and collaborative way, ensuring a collective ownership of the delivery of the project.

Regular code reviews are also carried out by peers within the team, validating against the core architecture, highlighting areas for improvement and optimisation in areas such as security, performance, compliance and ensuring code is reusable, readable and maintainable.

Secure development

Security is critical for every application we develop, and we have extensive experience of working within strict levels of compliance and stringent security testing for many clients (e.g. British Army, Royal Navy, MOD).

As part of the Technical on-boarding and design phase we will audit and document the data planned to be stored within the new application, agree what is deemed as personal identifiable, risk assess it and assign appropriate access controls and treatments to ensure that all data is encrypted, stored, transmitted (e.g. SSL) and accessed securely. This will consider the physical infrastructure, network, server configuration and application to ensure compliance against EU General Data Protection Regulations (GDPR) and PCI-DSS.

We perform web application security assessments of every release (where deemed necessary) to identify any vulnerabilities that exist on the web application. This combines industry-leading vulnerability scanning tools and manual testing to primarily target the most common threats to web applications (i.e. OWASP Top 10). As appropriate we would engage with an external agency to carry out further penetration testing against the application.



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Service features

- Supported cloud hosting providers: Azure, AWS, Google(GCP), MODCloud, D2S
- Strategic technical consultancy, planning, architecture, road mapping, implementation and support
- Specialising in Microsoft Dynamics 365 and Salesforce Cloud, Power Platform
- Data platform evaluation and procurement support and business case support
- Data cleansing, ETL data mapping and system integration
- Business Intelligence (BI) and analytics platform configuration (Power BI, Tableau)
- Database design NoSQL (Cosmos DB), SQL Server, Azure, MongoDB, MySQL
- Email campaign planning, design, build, integration, management and tracking
- Transition planning, execution, management and support from on-premise to cloud
- Data analytics and dashboards, analysis and insight gathering

Service benefits

- Information security assurance and compliance (ISO 27001, Cyber Essentials Plus)
- Alignment to Government Digital Service (GDS) Standards and assessments
- UK Technology Code of Practice, GDPR, Secure by Design compliant
- Specialist multi-discipline team experienced delivering Discovery, Alpha, Beta and Live
- Delivered by Microsoft Gold Partners with over 20 years experience
- Technical and user training, mentoring and support of CRM systems
- Consolidation and centralisation of customer data and consistency of communications
- Maximising organisational efficiency and reduce operational costs
- ISTQB-BCS Certified (ISEB), SC/BPSS cleared test analysts and infrastructure/DevOps/software engineers
- Comprehensive quality management services aligned to ISO:9001, ITIL4, ISTQB Gold



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Service outcomes

- A CRM blueprint aligning processes, data and integrations with business goals
- Stakeholder consensus on customisations, migrations and analytics
- Reduced risk via secure, GDPR-compliant transitions and testing
- Measurable uplift in engagement, efficiency and CLV via dashboards
- Clear consolidation of customer data for consistent comms
- Embedded user/training support for self-sufficiency
- Optimisation roadmap with cost/efficiency KPIs
- Phased rollout linking CRM to revenue outcomes



02

Our approach



How we work

All the work we do within the public sector aligns with the Government Digital Service Standard, ensuring that we:

- Work using agile methodologies including user-centricity and iterative development
- Understand user needs, based on thorough and ongoing research and testing
- Employ a multidisciplinary team, and we have a large pool of resource to draw from
- Work in the open, including all source code, where commercially viable
- Use open-source solutions and common platforms where possible
- Ensure effective measurement and ongoing performance analysis
- Ensure AA/AAA accessibility standards are met
- Adhere to the Technology Code of Practice
- Work using phased delivery (e.g. Discovery, Alpha, Beta, Live)

The following outlines our broad Agile delivery approach for government and public-sector projects, developed over time and fully aligned with GDS requirements. While this provides a proven framework, every project is different, so we tailor our approach to each organisation's specific needs - taking a pragmatic and flexible view of delivery that aligns with your structures, culture, budget and stakeholder environment.

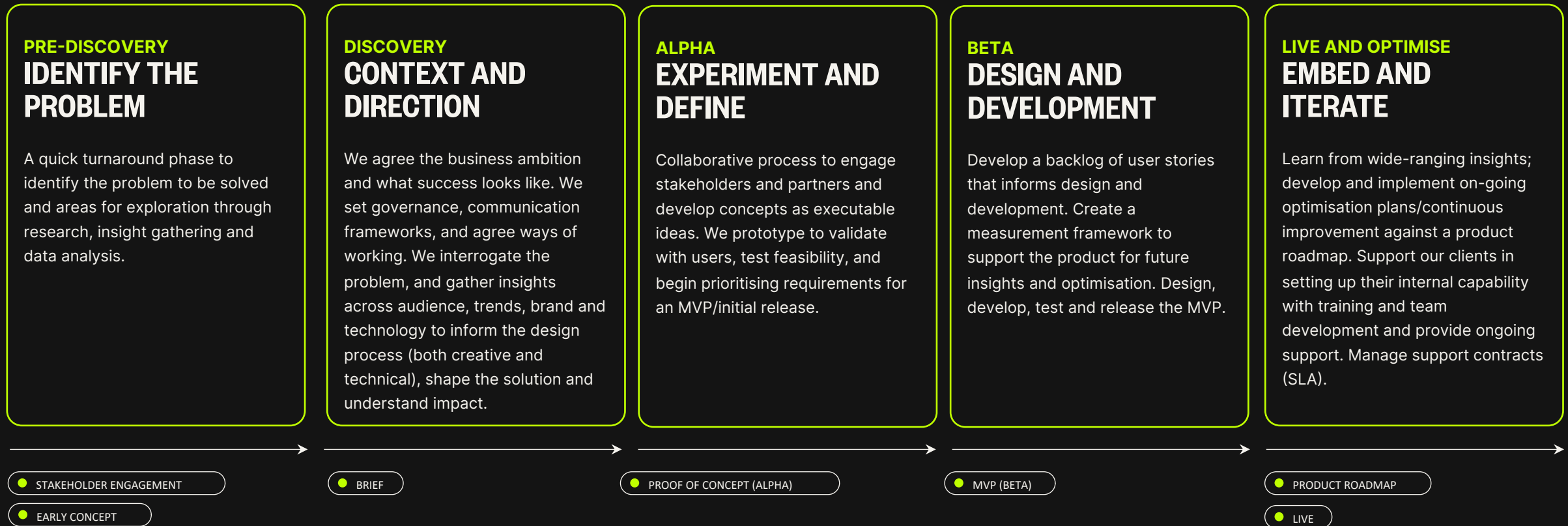
Phased delivery

Following Agile principles and in-line with the GDS service standards, every project is approached using a phased delivery methodology, unless the specific project requirements dictate otherwise.



GDS delivery framework

An agile approach





Pre-discovery

We often start with a pre-discovery – this is a quick turnaround phase to identify the problem to be solved and areas for exploration through research, insight gathering and data analysis. Often, we need to engage wider stakeholders to help shape and focus the brief (for example, technical recommendations that impact a solution used across an organisation).

The typical activities include:

- Establishing business drivers
- Identifying SMEs
- High-level technical research
- Wide user research and data analysis into problem area(s)
- High-level user journeys and opportunity maps
- Prioritisation of requirements for Discovery

Possible outputs include a business case, concepts/visuals to inform Discovery, findings and recommendations report and approach for future phases. This phase

isn't necessarily a requirement for every project and where this phase isn't undertaken separately, a number of the above activities would take place within Discovery.



Discovery

A Discovery phase helps us to better understand the problem we are trying to solve. It allows us to understand user needs, and those of the organisation – agreeing business ambition and what success looks like. We interrogate the problem, gathering insights across audience, trends, brand and technology to inform the design process, shape the solution and understand impact. To do this effectively we conduct primary user research, but it is critical to contextualise this activity with insight from the organisation, the needs of internal stakeholders, technical constraints and the wider landscape. According to the specific challenge, this activity could include workshops, policy inductions, shadowing, analytics reviews, technical audits and competitor reviews.

In addition, we set the appropriate governance, communication frameworks and regular ceremonies, and agree ways of working. This can be flexed over time but is important to have a solid foundation in place from the outset.

A Discovery phase is generally planned for two to ten weeks, depending on the scale of the project.

The first aspect of this phase would be a kick-off where we undertake a number of

set tasks designed to ensure that we are fully aligned with the project aspirations, initial requirements are validated, and project risks are documented. This would normally include:

- Immersion and review of any work to date
- Pre-discovery requirements/outputs validation
- Agreement on ways of working, governance, communication, ceremonies, co-location, project tools
- Team chemistry session
- High-level risk management
- Stakeholder mapping
- Set-up of shared tools and systems
- Planning for the remainder of Discovery, including user-research requirement



Discovery

Once the kick-off is complete, we move into the remainder of the Discovery activities, which would typically include:

- Stakeholder interviews to better understand longer-term goals and product vision
- User research: to establish user needs (including a focus on inclusivity and accessibility) and to potentially challenge organisational assumptions
- Desk research and competitor analysis (if relevant)
- Technical audit and architecture review
- High-level requirements gathering and prioritisation (if not already been established)
- Research analysis to shape insights - identifying how business outcomes will be achieved by meeting user needs, and shaping scope for an Alpha

At the end of this phase, we will understand whether the project should proceed to Alpha, the areas that we would like to focus on, how we will measure success and

the shape of the team required.



Alpha

During the Alpha phase, we will work to understand how a new product or service needs to be designed and built, based on user needs and business requirements that have been captured in the Discovery phase. If Discovery establishes the problem to be solved, then the Alpha tells us how we should solve it.

The Alpha phase has prototyping at its core. In order to understand the most effective way to achieve the business outcomes identified in the Discovery phase, we test design hypotheses through user testing and technical proof of concepts.

Working in iterations, we can design prototypes, test, analyse and rework within a week. This is a collaborative process involving Service Designers, User Researchers, Designers, Content Designers, Copywriters and Developers, and our clients, to ensure that all design outputs are shaped by user needs, are technically feasible, and achieve the desired organisational outcomes.

The prototypes that we develop are of end-to-end elements of the user journey. They will be developed with the purpose of answering a specific research question or design hypothesis. The level of fidelity of the prototype will be proportional to the value of the question that we are answering. This means prototypes could be

made from paper, lo fi design software or code.



Alpha

An Alpha will typically last between 6-12 weeks, with a week-long ‘inception’ (planning) phase to start and ending with a week-long ‘conclusion’ (write-up).

In addition to the user-research led elements of the phase, we will also: Investigate any technical requirements and run proof-of-concepts as required :

- Make final decisions as to CMS solution and cloud-based hosting, to enable Sprint-0 environmental set-up
- Validate any proposed IA, usually by using Treejack testing with users
- Understand any copy and/or content requirements
- Plan for inclusive and accessible design and assisted digital, ensuring that we have testing with users with a variety of access requirements
- Undertake a review of goals/measures of success to enable thorough analytics
- Establish data requirements

- Prioritise Beta requirements including non-functional requirements and constraints (this will provide the scope for the Beta written as user stories and acceptance criteria – in this phase this can be done to Epic level or more detailed user stories. If detailed user stories are not done in Alpha, they will be done as part of a Sprint 0 in Beta)

By the end of the Alpha phase we will know whether the product or service should proceed to Beta. We will also have determined the approach, addressing the structure, scope, technical and people requirements for Beta. Most importantly we will know how we are able to meet user needs with validated and tested end-to-end journeys.



Beta

Once we have completed a thorough Alpha phase, we move into Beta development. Usually working in Scrum, we ensure we are following the GDS requirements of iterative development, regular deployments and consistently following an Agile approach.

We typically have a two-to-four-week Sprint 0 to set up environments, finalise the backlog, run initial sprint planning and produce a level of UX/creative to feed into sprint development. We then move into two-week sprints, with a multidisciplinary team, with regular cycles of user testing, and releases.

As a standard, development will continue until there is confidence that the service can be deployed to Private or Public Beta, usually following a successful GDS assessment .



Live

Once a product or service has been set live, we work with clients to ensure that there is ongoing support in place, a plan for future optimisation and development, an ongoing testing schedule and effective measurement or agreed goals.

We learn from wide-ranging insights and develop and implement on-going optimisation plans/continuous improvement against a product roadmap. We support our clients in setting up their internal capability with training and team development and provide ongoing support.

Some of the activities we undertake once a product or service is live are:

- 360-degree data analysis, measure against KPIs and provide insight
- Develop product roadmap for continuous improvement
- Product backlog refinement and prioritisation
- Smooth transition to internal teams

- Collate/analyse user insight from Beta
- Ongoing user testing
- Multi-variant testing
- Managed services – Service Level Agreement (SLA) support
- Consultancy service



The delivery team

We believe great outcomes come from building the right teams around the right challenges. We carefully assemble multidisciplinary teams with the skills and experience needed at each stage of delivery, balancing continuity with flexibility as needs evolve. Clear roles, shared goals and well-defined ways of working ensure everyone understands how they contribute to success.

Of course, resource requirements can change as the phases progress, and we ensure the same core team remains allocated to any project through its entire lifecycle.

Typical roles:

- Delivery Manager / Scrum Master
- User Researcher/s
- UX Consultant / Service Designer
- Technical Architect
- Business Analyst
- Designer
- Content Designer

- Developer/s
- Quality Assurance
- Digital Analyst
- Data Analyst
- Data Scientist
- Data Engineer
- Product Owner/Manager

In addition, to ensure we offer the required level of support from a client relationship management perspective, we will provide a dedicated client service resource.

Just as importantly, we invest in making teams work well together. We create environments built on trust, openness and psychological safety, where issues can be raised early, ideas are encouraged and continuous improvement is part of everyday working. Strong leadership, regular feedback loops and shared ownership help maintain momentum and quality throughout delivery.

We place real value on people - not just for what they deliver, but for the culture they help create. By supporting wellbeing, encouraging development and embedding collaborative behaviours, we build stable, motivated teams who care about outcomes and take pride in delivering work that makes a genuine difference for our clients and their users.



The delivery team

Immersing ourselves in your organisation

Beyond our processes, principles and methodologies that guide how we work, we're people and we really believe that getting to know each other and building strong relationships is one of the key ingredients to a successful partnership

So, we'll go beyond the usual onboarding processes and get to know you properly. We like to get a deeper understanding of you, your brand and your business – it's important to us to build knowledge beyond the project. We believe it helps if you understand more about how us and how we think as a business, and we'll also get to know your likes and dislikes so we can understand how to support you best and how to shape the way that we work together.

We do this through prioritising time together, and this could be in a variety of ways:

- Chemistry sessions/team lunches – getting to know each other on a professional and personal level
- Thought leadership and webinar invites
- Brand and business immersion for the entire team

- Spending time in each others' offices experiencing the workplace culture - we welcome having our clients come and spend time with us, and if you do, you'll probably get to meet one of the many office dogs!

One team principle

We don't like to work for our clients, but with them. Better outcomes are achieved if the project team is made up from a mix of client and agency resource. While this is not always possible, we encourage clients to provide roles beyond the standard Product Owner and/or Service Manager. Not only does this approach ensure better alignment of project goals throughout each phase but negates the need for extensive handover and/or upskilling at the end of the contract period.

Co-location

Following Agile principles, we will actively seek co-location opportunities on projects where possible. We believe that when the team work physically together then it leads to better communication, problem solving and ultimately, outcomes. When full-time co-location isn't viable, then open working practices and communication tools such as Slack, Teams, Miro, Trello, Jira and Azure DevOps are used depending on what is right for project and client.



How we scale up

We use structured forecasting and flexible resourcing to scale quickly while maintaining continuity of service

We plan across monthly, quarterly and annual horizons to understand peaks and troughs in demand, allowing us to anticipate pressure points, balance workloads effectively and maintain a consistently high standard of delivery.

Our core team provides stability and continuity

A dedicated, multi-disciplinary team operates as an extension of the client's organisation, retaining deep knowledge of objectives, stakeholders and ways of working. This ensures accountability, consistency of decision-making, and momentum over time.

We scale intelligently as demand increases

Where additional capacity or specialist expertise is required, we draw on our wider Great State team and trusted partners. This gives us access to strategy, UX, engineering, data and delivery specialists at pace, without compromising quality, governance or ways of working.

Scaling is planned, not reactive.

Because resourcing is underpinned by forecasting, clear role definitions and established delivery frameworks, we can scale up or down smoothly in response to changing needs, while protecting delivery quality, budget control and timelines.

The result is a model that is both resilient and flexible.

Clients benefit from the continuity of a stable core team, combined with the confidence that additional capability can be introduced quickly and seamlessly as priorities evolve.



Project ceremonies and communications

Through delivering large-scale, multi-stakeholder programmes, we've learned that strong, consistent communication is often the biggest factor in whether a product or service succeeds. In complex central government environments - with multiple suppliers, internal teams and governance layers - misalignment can quickly slow progress and dilute outcomes.

Our experience has shown that the most effective way to maintain momentum and trust is through open, regular and visible collaboration. Practices such as show and tells, open working, whole-team retros and shared delivery tools create frequent opportunities to align on priorities, surface risks early and resolve issues before they escalate.

By combining these with clear governance structures and stakeholder working groups, we ensure the right people are involved at the right time, decisions are made quickly, and everyone remains focused on shared outcomes. This approach helps us reduce friction, improve quality and keep delivery moving - even across large and complex programmes.

To ensure alignment and successful delivery, there are several tools and methods that we employ, regardless of the scale of the project. These include:

- Regular show and tells
- Blogging/week notes
- Open working
- Whole-team retros
- Scrum of scrums
- Open Slack channels (or equivalent)
- Azure DevOps
- Stakeholder working groups

We ensure the appropriate level of communication and governance is in place to foster collaboration and transparency.



GDS assessment process

We understand the importance of successful GDS assessments, having taken several projects through the process, successfully passing.

We work to the principle of 'always assessment ready' and undertake regular internal sessions and retros to ensure that we are working fully in-line with GDS standards throughout the lifespan of any project.

We have worked with many government teams unfamiliar with the process and have successfully led them through assessments.

Project handover

At the conclusion of any project, we will undertake several steps to ensure that the client is able to take on further project development, and business as usual (BAU) work. This is a standard step regardless of whether Great State is providing ongoing support. Working using a 'one team' approach should reduce the requirement for a large 'end of project' handover, but the following steps will be taken regardless:

- Full systems training as required (e.g. CMS)
- Stepped upskilling and training across all relevant roles
- End of project retrospective and/or project wrap up
- Comprehensive documentation
- Provision of all project documentation, including research findings
- Access to code repositories



03

Technical and support approach



Our engineering approach

Grounded in disciplined, pragmatic delivery and a commitment to building solutions that are robust and sustainable

The way we address challenges is grounded in a disciplined and pragmatic engineering approach with a clear focus on solving real organisational challenges rather than implementing technology for its own sake.

We prioritise clarity over complexity, long-term sustainability over short-term fixes, and outcomes over outputs. This ensures decisions are made deliberately, with a clear understanding of trade-offs, risk and future impact, providing confidence at every stage.

Our approach is centred around a set of core engineering principles:

Secure and privacy by design

Security and privacy are embedded into thinking, design and delivery from the outset, not treated as an afterthought. This reduces risk, strengthens compliance, maximises your security posture, protects your data and ensures the platform is intrinsically resilient against malicious cyber attacks.

User-driven technology choices

Decisions are driven by the needs of users, both internal teams and external audiences, rather than technology trends. This results in platforms that are extremely intuitive and easy to use, easier to manage, and more effective at driving engagement and conversion.

Intentional simplicity

We favour simple, maintainable solutions to complex problems. Reducing unnecessary complexity will make the platform easier to operate, support and change, lowering long-term maintenance costs and risk.

Open standards

We advocate the use of open standards wherever possible. Open standards have similar benefits to open-source software – they have been designed collaboratively by a wide range of stakeholders, and they enable interoperability between different systems and components.

They enable us to build robust products and services that can easily be extended and integrated with other services, in a well-understood way.

Cloud-first

We design for the cloud to maximise scalability, resilience and cost efficiency. This will provide CCG with the confidence that the platform will scale automatically to handle heavy traffic in peak periods.

API-driven

All systems should be able to communicate with each other via APIs, enabling consistent and seamless integration across the wider digital ecosystem. This will further support code flexibility, reusability and maintainability.

Our goal is to establish strong technical foundations supported by a robust support and maintenance model. This enables ongoing optimisation, proactive management of technical debt, and sustained confidence in your digital estate to protect your reputation, improving conversion, and creating a platform that can evolve safely and effectively.



Platform selection

We have experience of evaluating and implementing a wide range of platforms, both open-source and enterprise level.

Open Source

Open-source software underpins a vast number of business-critical software and services around the world. It benefits from the scrutiny and rigour associated with being in the public domain, and the breadth of the ecosystem means that solutions to common problems often already exist and have been thoroughly tested in real-world use.

Enterprise

We work with enterprise software across complex, large-scale environments, supporting a wide range of user, operational, and regulatory requirements. This includes platforms such as content management systems, CRM solutions, middleware, and integration platforms, enabling us to select and implement the right mix of technologies to deliver secure, scalable, and reliable services.

Platform evaluation

Understanding and deciding which platform is the best solution for the product or service we are developing, is based on several factors:

- User needs
- Platform stability and vendor maturity and support provision
- Total cost of ownership, including licencing and ongoing operational costs
- Organisational capabilities and policies
- Integrations and interoperability
- Scalability and flexibility
- The Technology Code of Practice
- Longer-term requirements and technical roadmap
- What we have learned from any prior proof of concept work and previous experience



Evaluating the best fit

Core areas of consideration to inform a platform decision

01 02 03 04 05

User needs

- End users
- Content editors
- Technical administrators
- Platform capabilities
- Ease-of-use

Organisational needs

- Alignment to business goals and ambitions
- Commercial constraints
- Adaptability to change
- Maximising value and ROI

Technical requirements

- Interoperability
- Scalability
- Flexibility
- Alignment with internal capability

Operational process alignment

- Governance
- Workflows and approvals
- Compliance

Risk management

- Security
- Data protection
- Regulatory compliance
- Support



Cloud hosting selection

We have a cloud-first philosophy – the cloud brings with it many benefits, including:

- On-demand resources that can scale based on utilisation and need
- Resilience and redundancy
- Reduced operational overhead
- Cost effectiveness due to the economies of scale offered by cloud providers

We primarily build solutions on Azure and AWS, two of the largest cloud providers.

We consider several factors when selecting a cloud hosting provider, including:

- Whether it meets the needs of our end users
- Budget
- Availability of on-demand services that mean we don't need to reinvent the wheel
- Security considerations around storage of data and personal information

- Uptime and availability considerations

We also have extensive experience with on-premises hosting and hosting services within the Government approved cloud services (e.g. D2S, MOD Cloud).



Iterative development

Iterative development is a cornerstone of how we ensure we are delivering high-quality software that meets the needs of the end users.

We typically deliver work in sprints, following the Scrum methodology.

This means working in multi-disciplinary teams and delivering a working iteration at the end of each sprint. We hold a regular retrospective meeting at the end of each sprint to feed in what has been learned into subsequent sprints.

The multi-disciplinary nature of how we work means that we feed in learnings from user research, development, testing (user testing, performance testing, etc) such that we have a large, broad base of information to draw upon. It means decisions are informed, and we can react swiftly and pivot and adapt as needed. When combined with the last responsible moment principle, this means that we are very well-placed to deliver a working product or service that meets the requirements of the end users as those requirements evolve.

Version control

We use the industry-standard version control system, Git.

All code is stored in the version control system, and we follow the *gitflow* branching strategy, which is widely adopted in the industry.

The version control system allows us to iterate fearlessly, as we have the history of how the product has changed over time and can revert changes at any point if necessary. It also facilitates collaborative working.



Continuous integration and deployment

We use a continuous integration system, Azure DevOps, to regularly validate that our software builds correctly. This enables us to know immediately if there is a problem with any recently committed code, and act immediately to resolve it. Our systems will not allow us to deploy code that has fundamental problems.

We also use the continuous integration to run automated tests – giving us another layer of confidence around code quality. If the tests fail, the code will not be deployed.

Code that has passed our automated tests is then deployed to a series of non-production environments. As we use the same tool to perform all our deployments, we know exactly what is being deployed and can track every line of code back to an item of work. The servers are always in a known state – because our system tracks what has been deployed and to where. The system enables us to make small changes, often, which gives us a tight feedback loop – invaluable for being able to deliver working software quickly.

We advocate zero-downtime deployments – users should not need to suffer because things are happening behind the scenes. The typical pattern we employ is blue/green deployments – seamlessly swapping out application servers whilst the service continues to function as normal for end users.

Quality assurance and testing

Quality assurance and testing is an intrinsic part of our process and the responsibility of the entire project team to ensure success. Our team of ISTQB-BCS certified (ISEB) test analysts take an iterative approach to testing.

Firstly, understanding the requirements (functional and non-functional) and acceptance criteria. This is captured in a test plan with the approach, roles and responsibilities, browser/mobile device specifications, entry/exit criteria, areas of risk and assumptions.

The key areas of testing carried out by our quality assurance team covers application code, compliance performance, security and privacy. We use automated and manual executed scripts and exploratory testing, and all items found will be raised in Azure DevOps. We cycle through this process throughout the entire development lifecycle until all changes have passed.

We implement performance tools which continually monitor the solution, providing us with a granular level of metrics and the ability to troubleshoot and identify technical bottlenecks, to maintain high levels of optimisation against agreed benchmarks.



Monitoring

Automated monitoring tools will be installed and configured to provide 24/7/365 monitoring. These include:

- **Infrastructure monitoring** - monitors server resources such as CPU, RAM and disk usage
- **Application performance monitoring** - monitors code level performance of services, providing insight into areas for optimisation
- **Website level monitoring** – monitors application uptime, crash reporting, exception logs and performance of services
- **Security monitoring** - monitors security events from edge security services, including WAF, DDoS mitigation, Bot traffic logs



Business Continuity and Disaster Recovery

Great State ensures that with each solution a robust Disaster Recovery and Business Continuity Plan (BCP) for the delivered internal infrastructure and data is achieved. The overarching aim of the BCP is:

- Minimise interruptions to normal operations
- Limit the extent of corruption and damage (data and physical)
- Minimise the operational impact of the interruption
- Deliver BCP redundancy in the event of disruption to enable operations
- Provision of smooth and rapid restoration of the service

Our team of cloud hosting architects and support specialists works with our clients to define and implement a disaster recovery model to fit your requirements. Disaster Recovery is a coordinated process of restoring data, infrastructure, and systems required to support business operations.

There is no single solution that fits every client's disaster recovery requirements, and our process ensures we consider the following:

- Risk tolerance
- Acceptable amount of down-time
- Acceptable amount of data loss
- Intangibles - impact to reputation, loss of customer trust



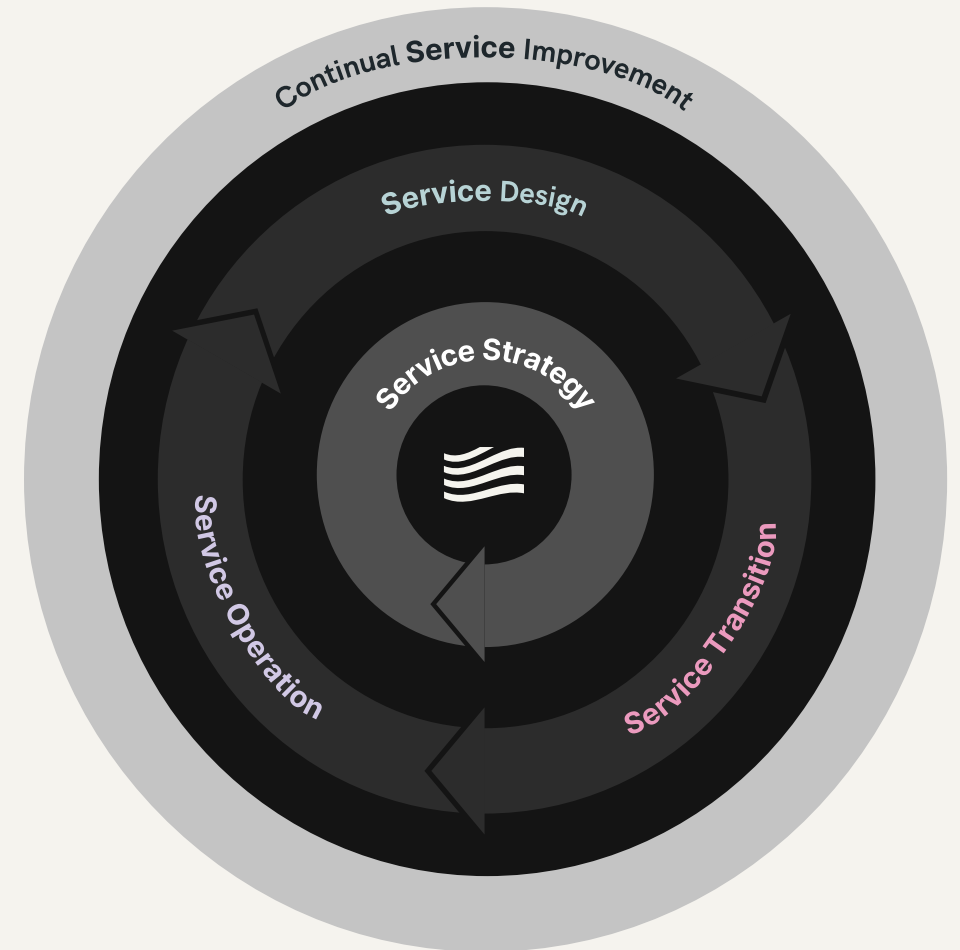
Support

After completion of work, we will provide a warranty period whereby any issues raised are resolved quickly. Following this warranty period, we can provide a Service Level Agreement to ensure that any issues which arise can continue be dealt quickly and efficiently.

This comprises of two elements; proactive monitoring - of services to identify and isolate potential problems before they become issues and Reactive response - to resolve any unforeseen problems which may arise.

Support includes the following key elements:

- Flexible hours of operation: 9-5 (UK business hours), extended or 24/7/365
- Robust, responsive incident, problem and change management
- Service request fulfilment
- Event and access management
- Applications management
- Support service desk and ticketing system for online, telephone and email support
- Platform security patching
- Proactive 24/7/365 website monitoring
- Application/platform(CMS) support and maintenance
- Managed hosting infrastructure services
- Edge security service management (e.g. CDN, WAF, DDoS protection)
- Automated monthly reports and quarterly service reviews





Accreditation, security and information assurance

Great State fully conforms with the UK Cabinet Office policy for information security and assurance, therefore ensuring the process and mechanisms are in place and adhered to, in order to deliver secure and reliable ICT systems in accordance with UK government policy.

These include but are not limited to:

- JSP 440
- Security Policy Framework (SPF)
- ISO 27001
- PCI DSS 4.0 – Payment Card Industry Data Security Standard
- ISAE 3402 – International Auditing Standard
- UK Data Protection Act 2018
- EU-US Data Privacy Framework (Sharing data with US)
- Adherence to Government Security Classifications (GSC)
- UK Cyber essentials and Cyber essentials+
- EU AI Act

- General Data Protection Regulations (EU/UK GDPR)
- Alignment to Government Secure by Design principles and NCSC security standards

Copies of Great State internal security policies are available on request.

Great State has in depth experience of working with DSAS (Defence Security and Assurance Services) and PSYA (Principal Security Advisor) to ensure full system compliance is achieved.

Deliverables include:

- We continually monitor and look at ways to improve against the standards set and maintain additional compliance with the International Standards ISO 9001 for Quality Management and ISO 14001 for Environmental Management
- Security and penetration testing (and supporting documentation)
- Impact assessments (Business, Privacy, Data protection)
- RMADS (Risk Management and Documentation Sets)
- SyOps (Security Operating Procedures)



Technical credentials

We have extensive expertise across a broad range of technologies using solutions in both traditional and modern architectures. Our capability spans composable, headless and enterprise level platforms, always with a focus on finding the best-fit solution for your challenge.

We have a strong track record in identifying, evaluating and integrating SaaS products such as payment solutions, authentication services ecommerce and CMS' that take an API-first approach, built into experiences for web and mobile (hybrid and native).

We also have vast experience of seamlessly integrating with many different systems and services, such

as CRM and ERP systems like MS Dynamics, Salesforce and HubSpot.

Our ITIL4, ISO 9001 and ISTQB-aligned processes are designed to maximise quality of all outputs and a focus on continuous improvement of the services we provide to you.

We have a robust approach to security, underlined by our Cyber Essentials Plus and ISO 27001 accreditations. This, coupled with one of our core architectural principles of secure / privacy-by-design ensures that we provide robust, secure and compliant solutions, demonstrated by the military grade security we have implemented across our MOD and defence clients.



Gold
Microsoft Partner





04

User-centred design approach



User-centred design

Designing for real people

User-centred design (UCD), to us, is a mindset rather than a process. It means designing around real needs and behaviours, shaping experiences based on how people actually think, decide, and feel - not around internal structures or organisational convenience.

Inclusive design is a natural extension of this approach. It recognises that people arrive with different cultural backgrounds, language confidence, access needs and socioeconomic circumstances. Designing inclusively means using clear, plain language, avoiding assumptions and creating flexible journeys that work - regardless of prior knowledge or confidence.

We balance your organisational ambitions with a human experience that reduces anxiety, builds confidence and makes next steps clear, ensuring that - whoever you are - your experience is accessible, welcoming and supportive.



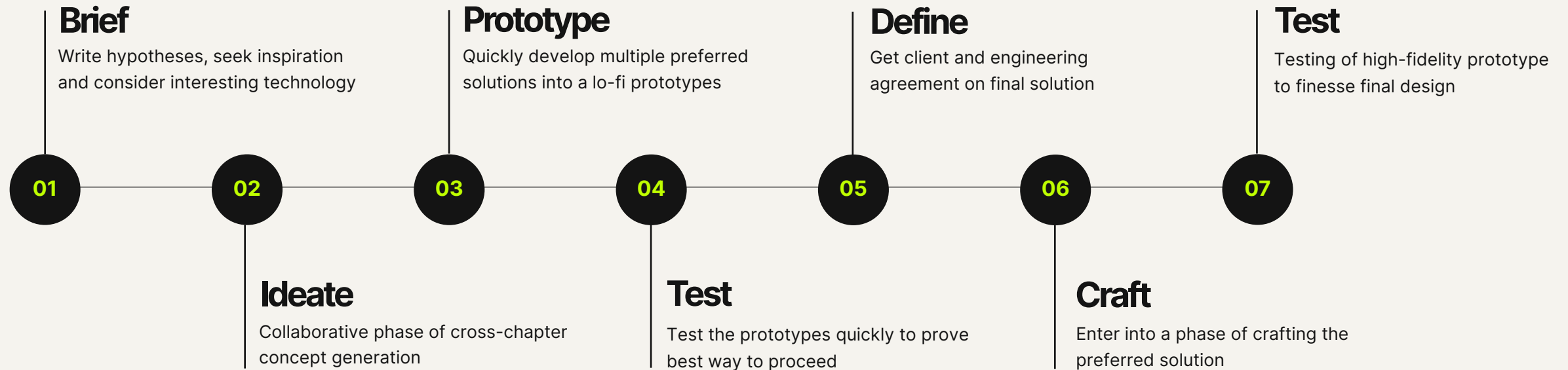
It's important to recognise that with each project comes a unique set of clients and a unique problem to solve.

While this process aims to put in place a general design process that should be adhered to, please take the time to consider how the context of your project may require the process to flex.



User-centred design process

Timelines for activities should adjust to suit the scale/complexity of the project





Craft

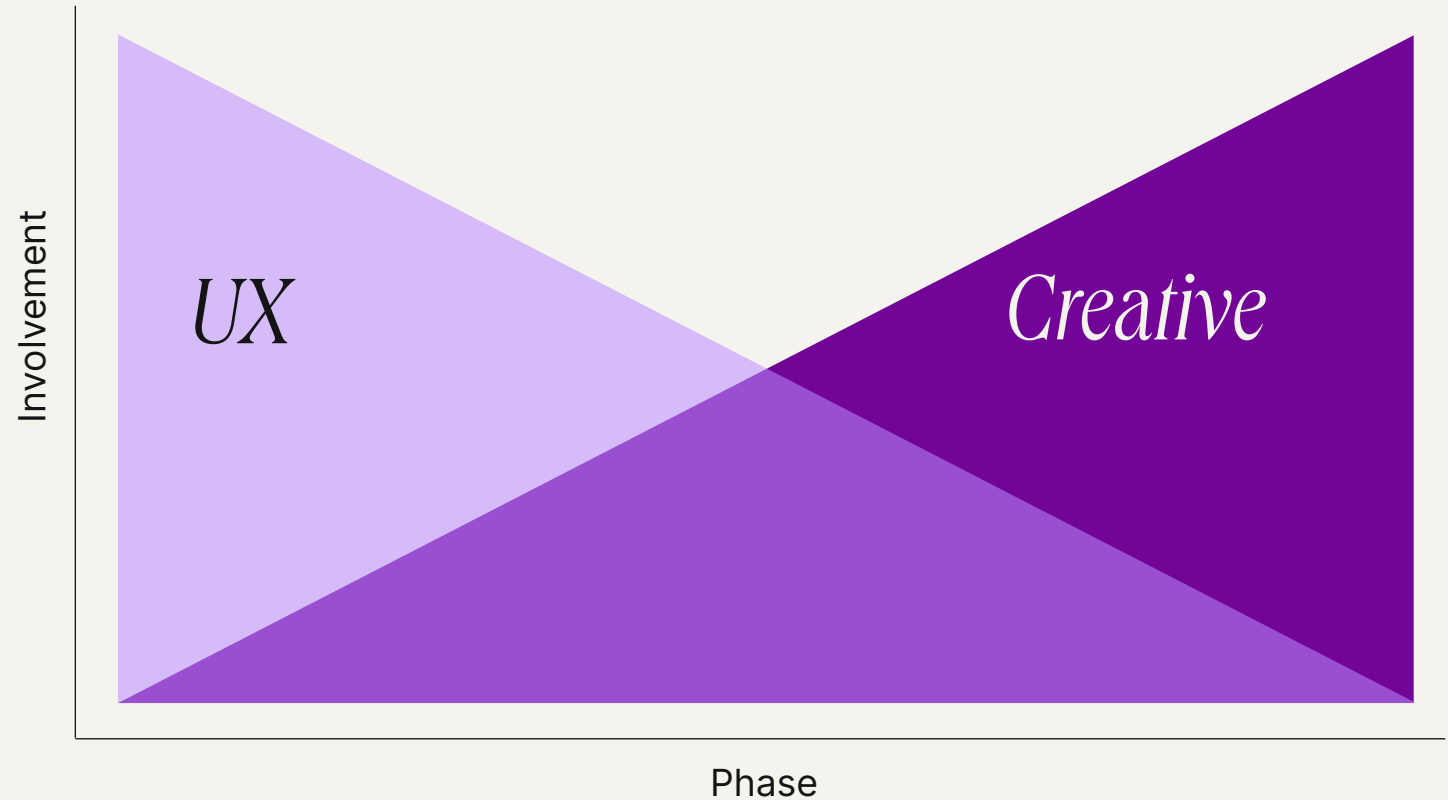
Turn the agreed concept into something beautiful

Once a direction has been agreed, a project will progress into a more defined design. The project should segue seamlessly from UX to creative with some overlap to allow time for collaboration.

Depending on who is resourced on the project, responsibilities will blur but we've tried to outline these on the next page.

As the project progresses, you should constantly ask yourself:

- Is the design going to deliver against the KPIs set out?
- Are we able to deliver in the allocated time?
- Is the work progressive and meeting the needs of the next generation?





Responsibilities

How UX and creative should work together

UX

- **How it works**
- User journeys
- Process flow
- Information architecture
- Component planning
- Black and white wireframe design
- Interaction design
- Initial content laydown



Creative

- **What it looks like**
- Brand guardianship
- Visual design
- Interaction design
- Motion design
- Design system
- Full content – final text and imagery



05

Pricing



Pricing

For full rate card please refer to the associated pricing document relevant to this service definition.

We understand how important it is that every penny of public money delivers clear value and supports your wider objectives. That principle underpins how we scope and cost our work.

We believe transparent commercial relationships benefit everyone, so our pricing is built on a modern, mature, trust-based approach with open and honest conversations about costs from the outset.

Price and rates are only part of the picture. What matters most is the value delivered. By understanding your needs, constraints and future ambitions, we can shape solutions that make the best use of your budget and focus investment where it will have the greatest impact – ensuring money is spent on what matters most to your organisation.

How we deliver transparent, efficient and effective pricing:

- Use open, transparent rate cards aligned to framework terms, with no hidden fees or unexpected add-ons
- Shape pricing around clearly defined outcomes and scope, so client partners see exactly what they are paying for and why
- Apply blended day rates (where appropriate) tailored to the mix of strategists, designers, engineers and delivery specialists needed for each phase
- Build in options for flexible team sizing, allowing buyers to scale delivery up or down within framework rules
- Provide clear assumptions, dependencies and risk considerations up front, so changes to scope or pace can be priced fairly
- Offer straightforward, auditable pricing documentation that supports internal approvals and meets public sector procurement standards



06

More about Great State



Digital experience for the next generation

Customer expectations are transforming. Each generation expects more than the last. They're thinking differently, spending differently, living differently and there's no turning back.

The pace of change isn't slowing down, it's accelerating. It's all too easy for organisations to react without offering their customers distinct experiences that meet new behaviours.

Today, experiences need to be seamless, personal, and connected. Because that's what it takes for brands to earn loyalty and thrive. Because their customers expect convenience. Relevance. Excellence. Anything less feels frustrating.

We don't believe in digital for the sake of it. We look at the whole journey to make sure everything works together, online and off. The best experiences feel seamless - but they leave a lasting impression. That's the space we love to work in.

Intelligent design backed up by tech you can rely on. Always adapting. Always anticipating. Always aiming to deliver change at pace.

At Great State, we're proudly independent. We're curious, move fast and stay focused on what really matters. We work with you to help discover your digital alongside the true needs of your audience.

It's how we keep closing the gap between expectation and experience. Now and for the generations to come.



About Great State

Here's how we deliver digital experience for the next generation

Great State is a proudly independent customer experience agency.

We are the right partner to help clients anticipate change and stay ahead. We work with brands who want to focus on long-term impact, not short-term gain.

Our team of 90+ practitioners combine deep engineering, UX, strategy and creative expertise. But it's how we show up that makes the real difference.

We don't settle

We push for better answers - challenging ourselves and our clients to explore new ideas, backed by intelligent strategy and user insight.

We're all accountable

From engineers to creatives, everyone takes ownership of quality and outcomes, working as one team with our clients.

We aim high

We design and build with ambition - blending creativity and technical rigour to create standout experiences that scale.

We're good people

We bring empathy, curiosity and respect to every challenge, making collaboration easy and progress inevitable.





Recognition from our clients

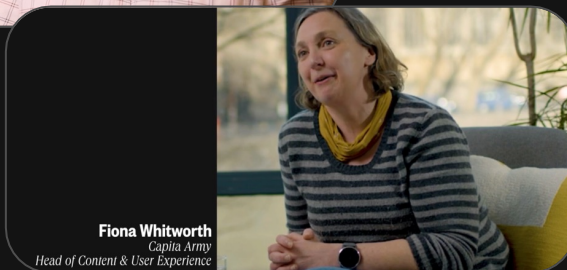
Scan the QR code to watch a 70 second YouTube
video testimonial from just a few of our clients.



Lt Cdr Morgan Long
Former MyNavy
Platform Product Owner



Fiona Whitworth
Capita Army
Head of Content & User Experience



Laura Shepherdson
RNLI
Scrum Master

*'If we didn't have the relationship
we have, we'd be nowhere near
delivering at the pace we deliver at'*

Lt Cdr Morgan Long
Platform Product owner, MyNavy



Recognition of our impact





07

Contact



Get in touch

Thank you for taking the time to explore our approach, experience and work.

If you'd like to discuss an upcoming brief, explore a specific framework challenge, or simply sense-check an idea, our team is ready to help.

hello@greatstate.co
