

BusinessOptix Limited (BusinessOptix)

G-Cloud 15

Service Definition Document

For

Business and Process Modelling, Task Management /Work
Instruction publication using BusinessOptix

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1 DOCUMENT NAVIGATION

This is the Service Definition Document for the BusinessOptix Service on G-Cloud 15.

2 OVERVIEW OF BUSINESSOPTIX'S G-CLOUD SERVICE PORTFOLIO

BusinessOptix is a cloud-hosted business visualisation and modelling platform that enables organisations to design, govern, and continuously improve operations, services, and delivery models. BusinessOptix supports UK public sector organisations in delivering digital transformation, improved governance, and citizen-centric services through a scalable, secure, and AI-enabled process modelling platform.

The platform supports process mapping and modelling, operating model design, service management, transformation planning, and data modelling. Outputs can be published to Word and PDF, or maintained in a secure, interactive cloud library that is fully configurable to organisational needs. Content can also be embedded into internal intranets or accessed offline.

BusinessOptix supports import from Visio, conversion to BPMN, and integration with downstream process execution and management tools. Optional consultancy services are available to support onboarding, transformation programmes, and governance design.

AI-enabled capabilities assist with model ingestion, reuse, consistency checking, and large-scale analysis across enterprise libraries, helping organisations accelerate insight while maintaining governance and control.

2.1 BusinessOptix for Government

BusinessOptix for Government provides a secure, business-owned visualisation platform that enables public sector organisations to model, redesign, and transform services by capturing and publishing processes, policies, and operational knowledge to employees and partners.

The platform supports standardisation, reuse, and transparency across departments, programmes, and delivery teams.

Using BusinessOptix for Government helps organisations to:

- Visualise end-to-end services, departments, and operating models
- Communicate change clearly and consistently
- Accelerate programme and project delivery
- Increase adoption of digital and operational change
- Improve staff productivity and knowledge reuse
- Enable data-driven decision-making through governed models
- Improve efficiency and service performance
- AI-enabled analysis supports the identification of gaps, duplication, and optimisation opportunities across complex service landscapes.

BusinessOptix aligns with the UK Government's Digital Service Standard by enabling the capture and reuse of structured operational knowledge, accelerating public service delivery and supporting transparency.

2.2 BusinessOptix for Hired Consultants

BusinessOptix provides consultancies and delivery partners with a secure platform to model, redesign, and transform client organisations by capturing and publishing methods, processes, and delivery knowledge.

The platform enables reuse of best-practice content across clients while maintaining separation and governance.

Using BusinessOptix enables consultancies to:

- Increase consultant productivity through reusable models and templates
- Create a governed digital knowledge platform across engagements
- Deliver consistent, auditable transformation artefacts
- Offer ongoing subscription-based access to clients post-engagement
- AI-assisted reuse and model analysis help consultants accelerate delivery while maintaining quality and consistency.

BusinessOptix helps consultants provide delivery assurance, reduce rework, and demonstrate value through transparent, repeatable, and client-specific models.

2.3 BusinessOptix for Outsource Management

BusinessOptix enables sourcing and operations teams to govern outsourced services by providing visibility, standardisation, and commercial control across the full contract lifecycle. Key capabilities include:

- Capture and reuse best-practice service models
- Cost and value processes to activity level
- Compare “As-Is” operations against best practice
- Support pricing analysis and commercial evaluation
- Manage SLAs and performance metrics
- Document target operating models for delivery teams
- Create and deliver training and handover to BAU
- Support operational billing and revenue recognition
- Manage change control and service expansion
- Support contract renewal, re-bid, and forward bids
- Consolidate operational knowledge for future sourcing decisions
- AI-enabled insights support pattern recognition, performance analysis, and comparison across suppliers, contracts, and service models.

BusinessOptix enables public sector sourcing teams to improve oversight, manage risk, and increase transparency across complex service ecosystems.

3 SERVICE DEFINITION FOR VISUALISING MANAGEMENT OPERATIONS, GOVERNANCE, PROJECTS, AND PROGRAMMES.

3.1.1 Functional Overview

BusinessOptix is a modelling and analysis platform used to design, manage, and govern business operations. While commonly adopted for process management and mapping, the platform supports a broad range of use cases, including:

- Operating model design
- Organisational design and role modelling
- Risk, controls, and issue management
- As-Is / To-Be analysis and transformation roadmaps (T-Maps)
- Portfolio, programme, and project governance
- Training materials and work instructions
- Enterprise architecture (including TOGAF-aligned models)
- Data and capability modelling

The platform is designed to be business-owned, enabling consistent governance, version control, and reuse of information across the organisation.

Cloud Architecture and Libraries

BusinessOptix Author is supported by secure, cloud-hosted libraries, with one or more dedicated libraries provisioned per customer. Each library provides:

- Version control and audit history
- Centralised document and records management
- Web-based collaboration, including online review and commenting
- Workflow-driven approvals and publishing
- Centralised configuration and governance controls

Modelling, Outputs, and Publishing

Authors create models using an intuitive, browser-based interface supported by online e-learning and guided modelling assistance.

Models can be published to multiple output formats, including:

- Word
- Excel
- Visio
- PDF
- PNG
- HTML
- SharePoint
- OneNote
- XML or CSV (raw structured data)

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All user-developed content is securely stored in the cloud and remains accessible through the

Author client.

XML-based content can be accessed directly if required.

Process Modelling and BPMN

A primary use case is process modelling using BPMN (Business Process Modelling Notation), which is included at no additional cost with the Author licence. BPMN uses widely recognised visual conventions (activities, decisions, flows), making models accessible to both technical and non-technical stakeholders.

Processes can be modelled, documented, and published almost instantaneously, with diagrams and documentation generated from a single, governed source of truth.

Eliminating Document Synchronisation Issues

Traditional approaches often rely on multiple tools (e.g., Visio for diagrams, Word for documentation, Excel for metrics), creating versioning and synchronisation challenges.

BusinessOptix resolves this by maintaining bi-directional synchronisation between models and documentation:

- Diagram changes automatically update supporting text and documentation
- Textual edits automatically update diagrams and model structure

For example, updating a swim lane or responsibility in the text view immediately updates the corresponding diagram, eliminating manual rework and inconsistency.

Collaborative Workshops and Review

BusinessOptix Author is frequently used in live workshops, where models are developed collaboratively and projected in real time. Participants can see changes immediately as models are refined through drag-and-drop interactions.

At the end of a session:

- Outputs can be instantly published (e.g. PDF) and shared with attendees
- Stakeholders can review models through a web browser
- Contextual comments can be added directly to activities, risks, or controls
- Feedback is collated and managed through built-in versioning and review workflows

Advanced Analysis, Metrics, and AI-Enabled Capabilities

More advanced use cases include:

- Attaching performance metrics to processes for efficiency analysis
- Scenario modelling and “what-if” analysis
- Lean improvement and waste identification
- Training materials and SOPs embedded directly within process models

AI-enabled capabilities support these activities by:

- Assisting with model discovery and ingestion from structured data sources
- Supporting automated consistency checks and model completeness
- Enabling intelligent reuse of existing models, components, and reference data
- Accelerating analysis by identifying patterns, gaps, and optimisation opportunities across large model repositories

These capabilities help organisations scale modelling and governance without increasing manual effort.

Integration and APIs

BusinessOptix integrates with a wide range of enterprise systems, including:

- Process and task mining tools
- BPM and workflow platforms
- GRC systems
- ERP and CRM platforms
- Automation and RPA solutions
- Master data, reference data, and system catalogues

A configurable and extensible API supports:

- Pushing data into BusinessOptix
- Pulling data from external systems
- Publishing governed models and metadata to downstream platforms

This enables integration across on-premises, hybrid, and SaaS environments.

Import, Export, and Interoperability

BusinessOptix supports import, export, and conversion across multiple formats:

- CSV
- Excel
- JSON
- BPMN
- Visio
- XML
- XPD

This enables interoperability with tools such as:

- Excel
- Visio
- Lucidchart
- Signavio
- ARIS

Standards and Extensibility

BusinessOptix includes a range of standard models and frameworks, including:

- BPMN
- ITIL
- Lean
- RACI

Additional standards such as TOGAF, BIAN, and custom data models can be provided or configured to meet specific organisational requirements.

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Architecture and Security

Hosting and Infrastructure

BusinessOptix is a fully hosted SaaS application deployed on Microsoft Azure with built-in redundancy.

- Primary region: UK South (applications and data)
- Secondary region: UK West (backup and disaster recovery)

Information Assurance

Data is protected during processing, storage, and transmission.

BusinessOptix is certified to:

- ISO/IEC 27001 – Information Security Management

Access Control and Identity Management

- Role-based access control (RBAC)
- Integration with existing Single Sign-On (SSO) solutions
- SCIM support for synchronisation with Active Directory and identity providers

Web Platform and User Interface

- Browser-based, web service application
- Platform, device, and environment agnostic
- Supports both internal and public-facing deployments

Management Information

- User activity and usage logs available
- Audit and governance records maintained
- Optional Google Analytics-based reporting available on request

Responsible AI

BusinessOptix agents operate on governed repositories with full auditability and version control. Models, rules, and outputs produced by agents are transparent and subject to human review before publication. This ensures alignment with public sector expectations around transparency, responsibility, and explainability in AI-supported decision-making.

3.1.2 Non-Functional Overview

BusinessOptix supports policy delivery and public service performance improvement by combining strategic dashboards, operational tools, and governed ways of working for:

- Daily operations
- Portfolio, programme, and project governance
- Monitoring, reporting, and assurance

Alignment with UK Public Sector Information Principles

BusinessOptix supports the following principles:

- Information is a valued asset
- Information is managed and governed
- Information is fit for purpose
- Information is standardised and reusable
- Information can be reused across services and teams

The platform also supports environmentally responsible digital delivery in line with Greening Government principles.

3.1.3 Service Delivery Model and Capability

BusinessOptix provides:

- Libraries of off-the-shelf templates (e.g. ISO, ITIL)
- A shared Knowledge Base for reuse across teams
- Author-created projects and templates distributed across organisations
- Import of templates from Visio and process execution platforms
- Optional pre-populated glossaries (e.g. ITIL, TOGAF, RACI, BIAN)

Hosting and Infrastructure

BusinessOptix is delivered as a fully managed SaaS service hosted on Microsoft Azure.

- Primary region: UK South (applications and data)
- Secondary region: UK West (backup and disaster recovery)
- Built-in redundancy and high availability

APIs

BusinessOptix provides secure APIs to support integration, automation, and data exchange across enterprise environments.

.2 Pricing

Pricing is based on a minimum purchase of a Process Analysis Repository Core, any specific security requirements, and integrations. There are three user license types, which can be purchased in any quantity and any combination. Process Mining Analysis Core and Governance and Risk Compliance Core are add-on modules. AI features may be added and are priced upon requirements. A package of professional services is recommended to accelerate, and custom configure, however, this along with further integrations and customizations can be purchased as needed. Please refer to the separate pricing document for more details. AI features may be added and are priced upon request

.3 Service Management

Our Service Desk manages all aspects of Service provision and monitoring, all first line support and contact for user-members through telephone, VOIP chat and email, being available over a normal UK working day (9 am to 5 pm). Assistance will expand the working day as demand for our services expands domestically or specific customers request this.

The Service Desk is located in Guildford, Surrey alongside our software development team staffed with BusinessOptix team members.

The Service Desk will be staffed by a Manager with overall responsibility for daily operations. Weekend cover will be provided where required by a designated team member on call using secure remote working.

Commissioning BusinessOptix is carried out by the Service Desk using an online registration form within the platform itself. Once the identity of the requester has been verified by a return email, then a typical starter community is live within 60 minutes for content load.

User authentication and identity provision is part of the subscription for BusinessOptix. Authentication, to provide Single Sign On (SSO) can be integrated to Active Directory (case study available) and with open standards based authentication based on SAML 2.0.

New service deployment for BusinessOptix is initiated and managed entirely by the Service Desk, in conjunction with customers.

If a member requires a bulk load of data or content then this is provisioned through the Service Desk, as would be video or more substantial learning orientated content.

.4 Service Desk and Escalation

Our Service Desk is the focus for all issue resolution on our Services. Requests for assistance can come through online ticketing, email (helpme@businessoptix.com), or a telephone call, as the member prefers. In the event that a member or the departmental customer feels that an issue has not been resolved to their satisfaction then a simple three stage escalation procedure is provided.

1st Level – When an issue arises - Online Generally we intend to resolve these ticket or a voicecall with an allocated service immediately and to give an estimated agent. time to resolve at that time. When the action is taken by the Service Desk to remedy that issue an email is sent to the originator to that effect. Our aim is to resolve 100% at the first intervention.

2nd Level - Should the remedy fail, not be The Service Desk Manager will ascertain fully as expected, or be beyond the original remedy and undertake a stated time, then an email or phone call further remedy or request for second line to the Service Desk Manager would be assistance if a more technical remedy is expected. required. Again a stated Time To Repair will be given at this point. Service credits will be raised if appropriate. When the action is taken by the Service Desk to remedy that issue an email is sent to the originator to that effect

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3rd Level – Should the 2nd level Remedy The Service Director will review the case fail within the stated time, and then a history and discuss this with the direct phone call to the Service Director originator, before making further is entirely appropriate. arrangements to amicably remedy the originators issue.

.5 Financial Recompense Model for Not Meeting Service Levels

Our commitment for BusinessOptix is based over the normal working day as a membership Service Credit. If not met:

95% - 97.5%: 5% of the subscription or charge during the month in which the failure occurred.

90% - 95%: 15% of the subscription or charge during the month in which the failure occurred.

89% and below: 25% of the subscription or charge during the month in which the failure occurred.

.6 Training

BusinessOptix offers a range of onboarding and training options to accelerate adoption:

- Self-paced video learning library
- Guided modelling sessions
- Optional onboarding workshops
- Learning management system (LMS) integration
- Contextual help and documentation embedded within the platform

.2 Ordering and Invoicing Process

BusinessOptix is procured around a simple model of a single block charge or by user/members.

Invoicing is annually based on the procured number of users.

.3 Termination Terms

.3.1 By Consumers

A customer agreement may be terminated by the customer at end of the agreed contract term on giving the Provider thirty (30) days written notice. On service of a notice of termination the Provider shall continue to provide the Services in accordance with the Service Level Arrangements without degradation. On termination the Provider shall repay to the customer any advances in respect of Services not provided, excepting membership subscriptions, and provide access to the Customer or any replacement provider for up to 3 months after termination, necessary support to enable transition to take place. On termination each party will return any property including any Confidential Information, to the other, if necessary entering the others premises to do so. Some clauses of the Terms and Conditions and G-Cloud Agreement survive termination.

.3.2 By The Supplier

BusinessOptix Limited as the Supplier may by giving reasonable notice restructure or terminate all or part of its Services, or enter into an arrangement with another G-Cloud provider in conjunction with G-Cloud management, to take over a service to ensure continuity for customers. This form of termination is considered unlikely as the underlying commercial and customer model is robust and focussed on delivering excellence to G-Cloud customers. In the event that such a termination is required, then notices of termination will be made adhering to individual customer agreements or Terms and Conditions (clause 16).

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Assurances will be made in the spirit of enabling a customer to evaluate a replacement service and migrate to that replacement service.

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.4 Data Restoration / Service Migration

For Service Migration we will provide a “simple and quick” exit process to enable members and customers to move to a different supplier for each of their G-Cloud Services and to retrieve their data. We have adopted a ‘no fuss, no delay, no charge’ approach where provided that no substantial payments are outstanding, then through the Service Desk, bulk customer data will be returned swiftly in a common format or by ftp transfer, to the customer or to a new provider.

This does not restrict the ability for self-restoration or downloading of smaller volumes of data and content by members at a community level.

Bulk restoration of data assumes that no special processing had been put in place to commission a community, which may require special work by the Service Desk to restore that data into an original format.

Metadata associated with an actual service migration of the BusinessOptix Service may not be directly possible to transfer a new service provider, due to inherent design differences between the two platforms. However, we undertake to co-operate as far as is practicable with the new provider to achieve such a service migration.

Purge and expungement will be the last action of the Service Desk, after a wait period of four weeks to enable the new service provider to recover from a catastrophic loss of data, following the transfer of data to the customer or a new provider. Then as defined in security our accreditation for different Impact Levels, suitable over-write or even physical destruction techniques will be used where appropriate.

Data recovery is provisioned by the Service Desk for instances of lost data or the reinstatement of a cancelled community.

Members can upload/download (on-board and off-board) individual and bulk documents and objects to load their community or workshop, using contemporary third party formats with information content or numeric data. Large uploads would be undertaken on the behalf of members by the Service Desk.

Data extraction/removal of member sourced content/data would be returned, purged and deleted from the records of the Service as requested by an authorised member; provided that information, data, or metadata has not effectively passed into the common use of that community – security issues notwithstanding.

The data standards and management training for the BusinessOptix Service level follow the guidance, governance and practices of the International Association for Information and Data Quality (IAIDQ).

Data storage locations of all servers, data storage and infrastructure constituting a BusinessOptix environment will have allocated locales, with an associated Impact Level (IL) standard. Each locale would be physically separate such that a catastrophic failure of one locale will not affect another. Similarly data cannot pass uncontrolled from one locale to another. Locales will be determined by the Deployment model, the customer’s specification and Impact Level requirements.

.5 Consumer Responsibilities

Our Terms and Conditions for BusinessOptix document the formal responsibilities of the customer.

In summary, the focus for BusinessOptix is on the customer ensuring that all users behave responsibly with the content uploaded to the platform.

- The customer is responsible for the performance of their own networks and telephony needed to access the tool.
- The Customer shall where appropriate, make available to the Provider such internet access, office space, computer resources, materials, facilities and other support and services as may be reasonably necessary to assist the Provider in the provision of the Services.

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- The Customer shall ensure that the Provider has access to its employees and any subcontractors to the extent reasonably required by the Provider for the purpose of making decisions and performing its obligations.
- The Customer shall promptly provide the Provider with all information and documents as the Provider may reasonably require or request for the proper performance of its obligations.
- The Customer shall: comply with all applicable laws and regulations with respect to its activities under this Agreement; and be responsible for procuring and maintaining its network connections and telecommunications links from its systems to the Provider's datacentres.
- The Customer shall adhere to these Terms of Service as amended from time to time and make all reasonable efforts to ensure that all Authorised Users on service instances controlled by the customer adhere to the relevant parts of these Terms of Service.
- The Customer shall adhere to the Acceptable Use Policy as amended from time to time and make all reasonable efforts to ensure that all Authorised Users on instances controlled by the customer adhere to the Acceptable Use Policy.
- The Customer acknowledges that its use of BusinessOptix is subject to its agreement to the Privacy and DCMA policy as updated by us from time-to-time.

.6 Technical Requirements

BusinessOptix takes its communications requirements from the host communications system.

.7 Details of Any Trial Service Available

A time limited free trial of the fully functional BusinessOptix Service can be provided for twenty days for a new departmental group of members.

.8 Service Roadmap

There is no published road map for the BusinessOptix application, we are happy to discuss our internal roadmap on request.

.9 Additional Information

None

Trademarks and Registered names:

BusinessOptix is the trademark of BusinessOptix Limited.

Microsoft and its products, and all other trademarks and registered names referred to are recognised and acknowledged to their owners.

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