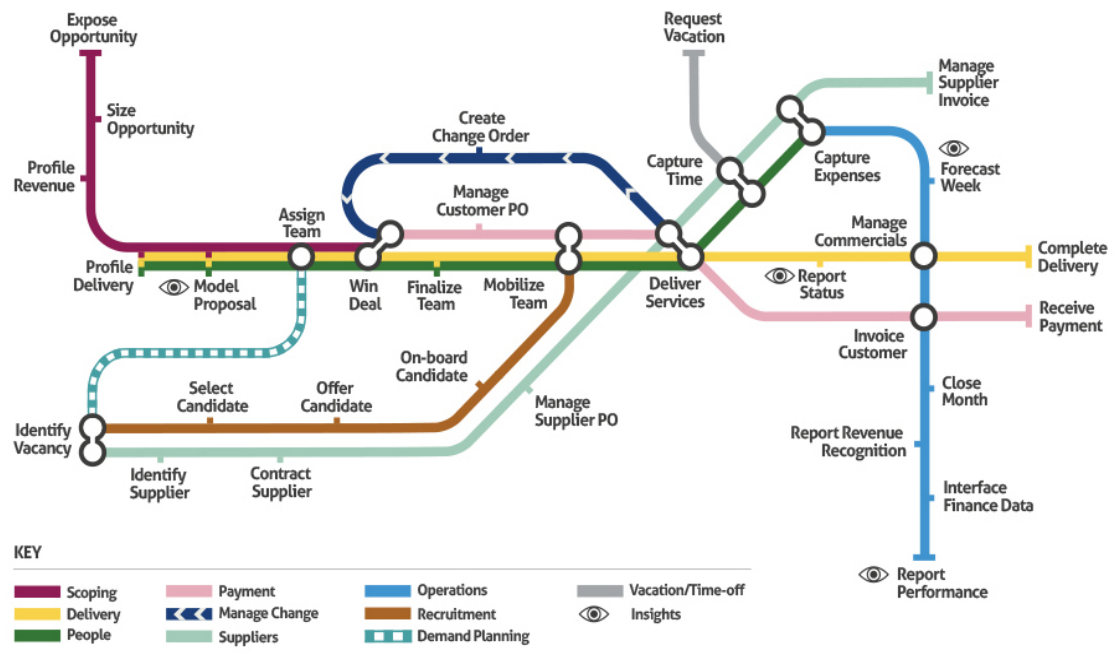


KANTATA SX Professional Services Automation (PSA) Implementation Services

Felber Consulting works with clients ranging from large government or private sector organisations to small & medium-sized enterprises. We work with Professional Services Organisations (PSOs) seeking to grow, to improve or change the nature of the services they deliver to the Public / customers or to re-think the way in which they deliver them.

KantataSX¹ is a Cloud-based Professional Services Automation (PSA) application that is used by leading consulting and IT services organisations – private and public – to manage their operations.

It supports the full engagement lifecycle, from early scoping, people & resourcing, delivery management, billing, recruitment, supplier management and managing weekly and monthly close and reporting processes. The system supports your team through transactional, process and strategic decision making.



¹ Kantata SX licences can be procured separately.

UK Public Sector departments are establishing professional service teams to develop and spread best practice and deliver reforms. Felber expertise in Kantata SX and in the Public Sector reforms helps those teams to develop, manage and understand their services and to improve service delivery to their customers.

When Do You Need Assistance with Kantata SX Implementation?

Kantata SX has been built to satisfy many common requirements of modern public sector professional service teams. The following list applies to a variety of services, from regional NHS procurement advisory teams to Central Government IT services:

- Ability to assign scarce resource to most significant outcomes.
- Ability to model costs and margins of new and established services - from early negotiations to as-delivered.
- Embedding of best practice processes into sales and delivery.
- Automatically forecasting time and cost details and recording actual values.
- Reducing period-close delays from weeks to days.
- Cutting invoice generation delay to improve cash-flow.
- Automating resource and cash forecasts and management.
- Managing a variety of delivery models (e.g. Fixed Price, Time & Materials, long term support services, benefit sharing)
- Simplifying complex expense management.
- Streamlining the approval of timesheets, expenses, invoices, milestones etc.
- Managing the optimum mix of employees and contractors.
- Improving client management with a single view of all activity KPIs calculated automatically and in real time to support decision making and planning.

Felber were one of the early adopters of Kantata SX (formerly Kimble) Professional Service Automation (PSA) and remain the longest serving Delivery Partners of Kantata (formerly Kimble Applications). As well as expertise in the application itself, our people are also experienced in delivering reform in the Public Sector, including NHS, FCO, MoD and local authorities.

We understand that the Public Sector usually has a different culture and different priorities to equivalent private enterprises, but also appreciate what may need to change and what core values must be preserved.

In both cases, there are scarce, valuable resources to be deployed across multiple customer organisations with complex, flexible requirements.

Felber can help public sector organisations deliver their services with effectiveness and efficiency using Kantata SX.

Implementation Approaches

We offer a variety of implementation approaches tailored to the circumstances and experience of your team.

For most Professional Service Organisations, we will be enabling Kantata SX as part of your wider transformation programme, and we can advise on sequencing effort to maximise returns on your investment and support any external dependencies.

Certain activities are Core (depending on your overall scope and current systems).

Other Optional activities can be undertaken by Felber, your team or jointly.

Common Core Activities: Inception Phase

- **Discovery Phase Activities:**

- Project planning
- Initial assessment of organisation and process change needs²
- Familiarisation demonstration to key project personnel.
- Development of Test Strategy.
- Development of Training Strategy/Training Needs Analysis.
- Identification of change management requirements.
- Development of Data Migration Strategy.
- Interface requirements (if any).

Common Core Activities: Configuration Phase

- **Configuration Phase Activities:**

- Advanced workshops covering Sales & Contracts, Resourcing, Delivery and Finance & Operations.
 - Capture of configuration requirements and issue/gaps.
 - Review of issues/gaps.
- Implementation of initial configuration.
- Completion of business scenarios/use cases.
- Completion of integration test scripts.
- Completion of UAT test scenarios.
- Deployment planning.
- Identification of training types, objectives, agenda & logistics.
- Design integration/Data migration process.

² Also see our “Cloud-Enabled Transformation Service” Description on the Digital Marketplace which supports this activity.

Common Core Activities: Test Phase

• Test Phase Activities:

- Conference Room Pilots x 2
 - Test configuration with business scenarios/use cases.
 - Document changes and gaps.
 - Review gaps and categorise as to-be process change or enhancement request.
- Further configuration between CRP1 and CRP2.
- Trial migration of data.
- CRP2 with migrated data.
- Further configuration after CRP2.
- User Acceptance Testing (UAT).
- Support of UAT execution.
- Maintenance and adjustment of existing client Salesforce Profiles, Related Lists etc.
- Refinement of deployment plans in line with system configuration and progress on all other workstreams
- Conduct of readiness assessments

- Conduct of training
- Interface system testing
- Testing of data migrations

Common Core Activities: Deployment & Roll-Out Phases

• Deployment Phase Activities:

- Migration of configuration changes to production.
- User setup.
- Execution of deployment plans.
- Installation of interfaces.
- GO-LIVE.

• Roll-out Phase Activities:

- Rollout support.
- Ad-hoc training.
- Ad-hoc configuration.

Tables 1a-1d: List of activities for Core Implementation

Core activities are those that can be supported by Felber at a fixed price. The amount of time required to deliver each activity varies with the complexity of your organisation and operations. Therefore, the fixed price of the Core activity implementation depends on the complexity of your situation.

As an indication, a simple situation could look as follows:

- An organisation experienced in its own business processes and the use of IT to deliver those processes.
- Existence of expertise in managing IT implementation and change projects and key technical and business resources are available to manage and contribute to the project.
- Operations are relatively simple. E.g. single business unit; single base location; simple delivery models (for example “Time & Materials” or “Fixed Price”); no integration with other operational systems

Core Activity Implementations (Examples)	
• Core implementation for simple organisation	£75,000.00
• Core implementation for more complex organisations.	£145,000.00

Table 2: Typical Core activity implementation costs

Your requirements for optional activities depend on your technical, organisational and operational situation, as well as the skills that you may already have in your business.

Common Optional Activities	Effort
• Definition of requirements and Integration with Finance Systems	2.0 days
• Report Generation (per Standard Report). Additional fields, layout changes to existing Standard Report	0.25 days
• Report Generation (per Complex Report). Requires new Report Type, formulae etc	0.5 days
• New Permissions / Security Grouping (Application Role) generation	0.5 days
• Import of Accounts, Contacts and in-flight proposals and projects	2-4 days
• Support for Training Needs Analysis, Reviewing Course Material and Attendance or Delivery	2-4 days

Table 3: Common Optional activities

These Optional activities are priced according to the anticipated duration, as indicated above.

Optional Activity Implementation	
• Price per day (or pro rata)	£1,480.00

Table 4: Optional activity implementation costs

For example, the construction of a new Standard Report would cost 0.25 days x £1,480/day = £370.

We Tailor the Solution to your Needs

We tailor the solution to suit your needs and we do this by spending time up front to understand your strategy, people, processes and systems, to develop an approach that works with your business and also, over time, increases the self-reliance of your own people as well as meets your business goals.

Benefits of Felber's Kantata SX Implementation

By engaging Felber Consulting you will have the support of experienced consultants with Public Sector reform expertise and deep knowledge of Kantata SX.

We understand the context and practice of the end-to-end processes within a modern Professional Services Organisation.

We are willing to engage according to a variety of contracting models to suit the degree of transformation you are planning. For example, we can contract on a fixed price, time & materials or even a contingent basis to suit your transformation and implementation strategy.

In addition, you will have support and advice from experienced consulting leaders to help you manage the implementation, embed good practice and new ways of working in your organisation and transfer skill to your people.

If appropriate we will also help you to plan and manage other changes in your organisation necessary to ensure that you meet your cloud-enabled business goals.

Felber Quality Assurance

We ensure that our engagements with you progress to expectation and that any agreed changes are properly planned and executed:

- Our engagement lead will conduct a pre-engagement review with your project manager to check on the Project Charter and the practical aspects of our consultants' work on your site.
- We will conduct weekly project meetings with your project manager to review progress, milestones, resourcing, issues and risks.
- We will conduct monthly (or per further agreement) sponsorship reviews which will include your Senior Responsible Officer and a Director of Felber Consulting Ltd.
- We will seek formal agreement of project milestones, particularly where our payment relies on the successful completion of such milestones.
- Post-engagement, we will ask you to provide a review of Felber's delivery engagement. For engagements valued at over £100,000, this will be conducted by an independent assessor.

We will support your department's own project and programme approaches (such as PRINCE2, MSP and so on), forms and reporting mechanisms.

Felber Assets, Tools & Advantages

- All our consultants are experienced with 10+ years in the Public Sector – as staff and consultants. We have public sector expertise in most areas, including local and national organisations; from health to security; single site to international.
- We use several file sharing and collaboration tools to share and develop collateral over the lifecycle of the engagement such as Slack, Trello, Google Docs and Atlassian Confluence. This provides the joint project team with common visibility of plans, reports, and source material. We use teleconferencing to promote easy, but structured communications that allow team members to maximise value-adding activity and avoid travel.
- *We use the Kantata SX Professional Services Automation tool to manage and control our contractual and delivery engagements, including commercial, project progress and milestone control.*

Felber Back-Up, Restore & Disaster Recovery

The safety and security of the materials we use and develop for our clients is a priority. We are used to various approaches, depending on the policies, regulation and circumstances of the engagement. We will confirm this with you as part of pre-engagement. For example:

- Where appropriate we will make use of the client's own hardware, software and / or policies governing information protection.
- We will use the client, or standard proprietary collaboration-ware.

Our computer protection and security are currently guided by the Cyber Essentials framework. We are currently in the process of seeking Cyber Essentials accreditation.

These measures ensure that our client's data and reports are held securely and with relevant levels of protection and ensure availability in the circumstances of disruptive events.

Felber On-Boarding & Off-Boarding

As part of the inception or pre-engagement phase of our work for you, we will agree certain aspects of how we will work together:

- The completion of a Project Charter or Project Initiation Document, agreeing the final scope, objectives and governance of the engagement.
- Practical arrangements such as security levels, building and data access, management, use of common tools, software and infrastructure.
- An initial plan, including milestones, timetable, review meetings.
- A schedule of anticipated deliverables.

At the completion of the engagement, we will agree with you:

- A schedule of documents or other media generated as part of the engagement, including master copies of any reports, bid documents, brown & white papers and other deliverables.
- The conduct of a join review session, identifying lessons learnt and potential next steps.
- Final hand-over to a support team (as appropriate).

Contact Us

For further details, please contact:

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