| **Service area** | **What does this include?** | **What is this, and what are 3-4 features, i.e. what is the actual offering** | **What are 3-4 key benefits of this service?** | **What problems/needs does this address? i.e. what are the reasons someone would be interested in this?** | **Who is the target for this – e.g. role, type of company** |
| --- | --- | --- | --- | --- | --- |
| **Validate** | Pre-sale evaluation to uncover what you really need, test feasibility, and sketch an outline so expectations are clear before committing time and budget. | * Rapid needs assessment * Outline of what platform can deliver * Alignment of expectations with product capability * High-level solution framing | * Clear understanding of fit before commitment * Early confidence in direction * Avoid wasted investment | * Uncertainty if platform is the right tool * Lack of clarity on outcomes * Fear of over- or under-buying capability | Senior sponsors  Procurement  Project Manager |
| **Discover** | Early exploration of the firm’s processes, people, and priorities to uncover what really matters before design. | * Stakeholder and user workshops * Current-state process mapping * Change impact assessment * Data source identification * Early identification of product champions | * Uncovers hidden needs beyond leadership view * Builds engagement across levels * Minimises risks of misaligned build | * Lack of full view across practice areas * Risk of missing user-level requirements * Resistance to change | Practice group heads, operations leads, change managers |
| **Design** | Translating requirements using best practice and design thinking to create a solution that fits your firm. | * Design thinking workshops * Process and data mapping * Business requirements specifications * Security and compliance design * Governance and operating model design | * + - * Fit-for-purpose solution       * Accelerated time-to-value       * Sustainable design principles       * Improved long-term adoption | * + - * Risk of over-customisation       * Systems that don’t adapt to people       * Missed opportunities for automation | CIO, transformation teams, process owners |
| **Build** | Iterative execution of the solution design with continuous feedback. | * Detailed scope and estimation * Configuration and customisation * Agile delivery cycles * Peer review and collaborative feedback loops * Acceleration tools | * Transparency on scope and cost * Faster delivery than internal capability * Higher quality through accelerators * Reduced project risk | * Uncertainty over effort required * Slow progress with internal teams * Difficulty managing iteration at scale teams | CFO, programme sponsors, IT managers, delivery leads |
| **Deploy** | Migration, change management, and putting governance in place so your firm can run confidently. | * Data migration and onboarding * Change management programme * Governance and adoption support * Training and role-based enablement | * Faster time-to-value * Smooth transition with minimal disruption * Higher user confidence and adoption * Stronger governance in place | * Poor uptake if not supported * Resistance to new processes * Risk of disruption to operations during transition | Change managers, operations directors, project managers |
| **Sustain** | Proactive care, innovation support, and iterative improvement so momentum is sustained, and your platform grows with your people and practice. | * Training and upskilling for new and existing users * Proactive, thoughtful support that safeguards your system and people * Innovation advice to help your firm explore new efficiencies and competitive advantages * Best practice documentation (naming, SoP, templates) * Enhancements and rollouts into new practice areas or processes | * Increased adoption and capability across the business * Ability to scale platform into new use cases * Continuous improvement keeps system relevant and future-ready * Access to innovation pathways shaped by deep domain and product expertise * A trusted partner who stays engaged, not just until deployment but throughout your journey | * Business gets stuck with “version one” of the design and does not make use of the platform’s full capability * Knowledge concentrated in too few people * Failure to adapt to new requirements or extend benefits to other practice areas * Ongoing disruption or wasted investment without expert guidance | Operations directors, knowledge managers, transformation leads, practice group heads |