UK Shared Business Services Ltd

Business Plan

2024/29

UKSBS

Shared Business Services


Polaris House

Chief Executive Overview

In October 2023, UKSBS became the recommended shared service provider to the Matrix Cluster[1]. This is a clear endorsement of the effort and hard work underway to deliver our Vision and Mission.

With our people at the heart of all we do, supported by empowered leaders and enabled by an inclusive and diverse working culture, this five-year Business Plan sets out how we will become indispensable to our partners, delivering consistent quality service, innovative technology and increasing economic value.

We have reset our strategic themes to better reflect the journey ahead, recognising technology, data and information, user experience and agile practices underpin all we aspire to do.

We will achieve our ambition, that will see the company transform and grow, by focussing on enduring service quality and efficiency, resilient ever-green digital infrastructure and leveraging the opportunities provided by being the shared service centre supporting the Matrix Cluster of the Government Shared Services (GSS) Strategy.

As a public sector owned shared service provider, UKSBS is motivated by a desire to deliver high quality value service to our partner organisations. We are proud to play our part in contributing to the success of our partners, as reflected in our Vision and Mission.

UKSBS is on a journey to be the leading UK public sector business service provider, efficiently and securely managing multiple technology platforms and delivering a great end-user experience, underpinned by simple processes and cutting-edge business IT. Our operating model will balance the value for money and efficiency offered by harnessing greater automation, data, AI and self-service with responsive and personal interactions for more complex needs. Our flexible approach will enable us to respond rapidly and creatively to changing partner requirements, while maintaining the efficiencies of standard processes and scale.

We are excited to be welcoming new public sector partners, adopting an agile and forward-thinking approach to meet their business requirements and the Government agenda. Our mutual ownership model will ensure best value for the public purse.

Richard Semple, CEO

[1]Reflecting the Government Shared Service Strategy, the Matrix Programme will deliver modern, cost-effective and scalable shared business services to nine Departments of State (the Policy Cluster), with UKSBS as the provider driving innovation to optimise and enhance use experience from a new SaaS ERP platform

Who we are

UKSBS aims to be the leading public sector shared service centre, motivated to deliver high quality, efficient and reliable service to our partners. Owned by our client partners, our public sector ethos is at the heart of what we do. We are proud to work alongside our clients to drive the advancement of the UK's economy and society.

Where we've been

UKSBS was created in the public sector, for the public sector. Over the years, the organisation has built its **operational resilience** whilst quietly supporting machinery of Government and other major changes.

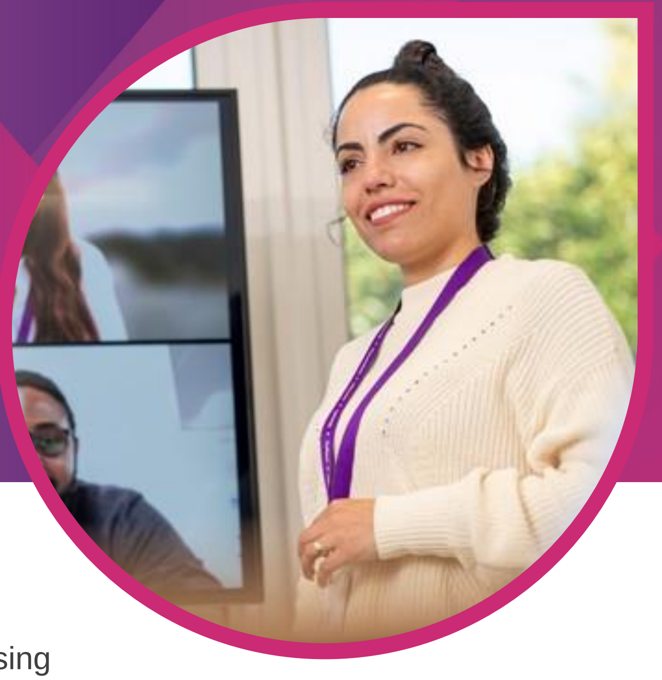
Where we are

UKSBS is on a major **transformational journey**, with a forward-thinking leadership team, and highly engaged workforce, working with UKRI to leverage the new SHARP Cloud platform and with the Matrix Programme to deliver a service step-change for Whitehall.

Where we're going

By 2029, UKSBS will **be the leading UK public sector business service provider**, efficiently and securely managing **multiple technology platforms** and delivering a **great user experience** and adding value to our partners

Strategic Intent



In 2029 UKSBS will be the leading UK public sector business service provider, offering ever improving user and client experience and realising increasing value for money for the taxpayer. In collaboration with our partners, both existing and new, we will modernise and transform end-to-end business processes, enabled by the latest SaaS Enterprise platforms. We will deliver significant economies of scale by at least doubling the size of our business as we work with the Matrix Programme to add new Government Departments to our roster of owners and partners[2]. Continuing to reskill and reset ways of working alongside leveraging the SHARP[3] Programme will provide the springboard for:

- Further exploitation to help UKRI realise headcount and financial efficiencies
- Delivery of the Matrix Programme and the realising of benefits for the Matrix Departments
- Increasing the commonality of services provided to our partners
- Offering affordable services to other public bodies and developing new services.

Vision

The leading UK public sector business services provider, actively sought by public bodies

Mission

To provide high quality and easy to use business services that add value to our partners, so they can focus on achieving the best outcomes for the British people and the UK economy

[2]Current owners: Department for Business and Trade (DBT), Department for Energy Security and Net Zero (DESNZ), Department for Science, Innovation and Technology (DSIT). UK Research and Innovation (UKRI); New partners, the other Departments forming the Matrix Cluster: Cabinet Office, HM Treasury, Department of Culture, Media and Sport, Department of Health and Social Care, Department for Education, Attorney General's Office
[3]UKRI sponsored Shared Services for HR, Accounting, Reporting and Procurement programme, replacing one of UKSBS' current on-prem platforms

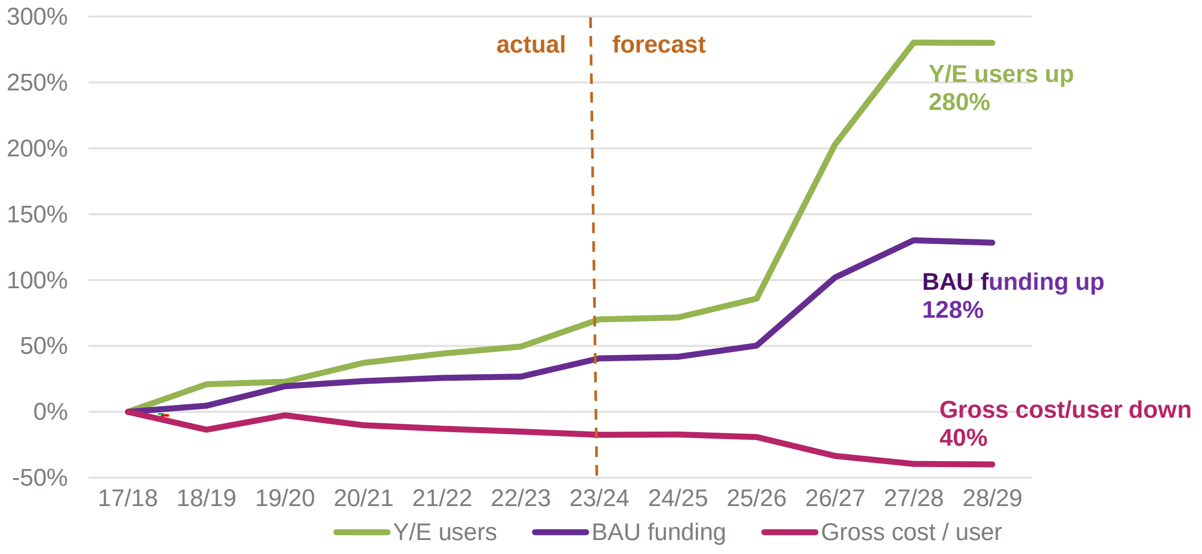
Our vision aligns to the Government's Shared Service Strategy

Our mission embodies the unique mutual relationship with our owners, who are also our largest clients, and whose employees are the end-users of our service. It drives a customer centric approach throughout the organisation.

How we conduct our business is encapsulated in a set of values and behaviours.

Our vision will see us continue the trend of recent years in which we have established a track record of **unit cost reduction** – our cost base has grown to support a continuing increase in end users but at a significantly slower pace than costs paid by our partners.

Change since 17/18 (actual and forecast): users and gross cost[4]



[4] Figures are not adjusted for inflation and include all services. The Business Plan targets of 40% cost per user reduction over 5 years refers specifically to core services.

Strategic Approach

We will attain our vision by leveraging our **key strengths**, which are valued by current and potential public sector clients, to exploit **market opportunities**.

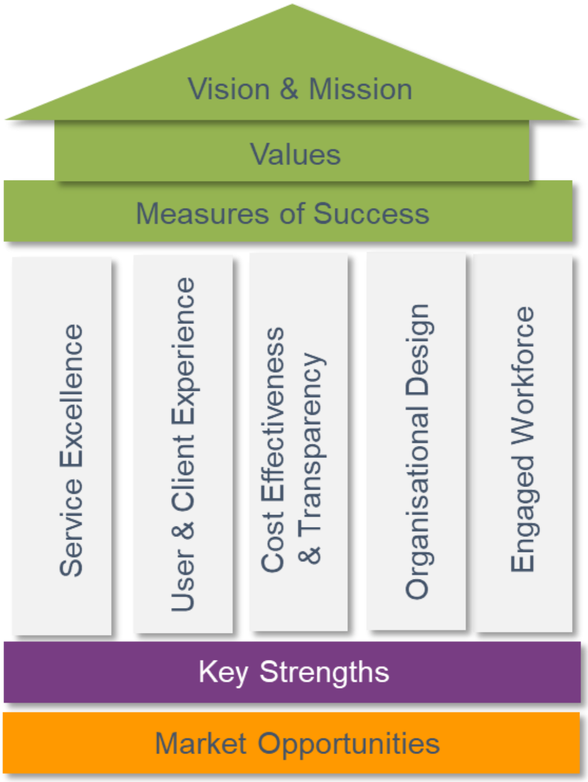
Progress will be **measured** against a clear set of **success** criteria that are important to our partners, as both owners and clients. Our plan is built across five **themes** which, coupled with fast maturing capacity and capability, will lead to a larger, strengthened mutual 'Teckal'[5] organisation.

UKSBS will efficiently and securely manage multiple technology platforms and deliver a great user experience, underpinned by simple processes and cutting-edge business IT.

Our operating model will balance the efficiency offered by harnessing greater automation and self-service with responsive and human interactions for more complex needs.

This operating model will integrate seamlessly with our clients' intelligent client functions, to identify and deliver service efficiencies and harmonisation alongside continuously improving the end-user experience. Our data analytics expertise and service will provide actionable insights that inform our shared end-to-end improvement priorities. We will manage underpinning SaaS Enterprise platforms to ensure fully effective integration of technology, including AI, people and process.

Our flexible approach will enable us to support a range of current and emerging client requirements including the need to rapidly respond to urgent policy imperatives.



[5]A public sector procurement derogation allowing services to be provided by a subsidiary without competition

We recognise that a properly skilled and engaged workforce is crucial to our transformation and so our people will continue to be at the heart of our company, supported and empowered by positive leaders and enabled by an inclusive and diverse working culture. We will have leveraged external expertise and capacity through our SaaS suppliers and a Managed Service Provider to bring innovation to UK public sector shared services.

We will have welcomed new owners and clients adopting an agile and forward-thinking approach to meet their requirements and the Government agenda. Our mutual ownership model will continue to ensure the best value for the public purse with the agility to respond rapidly to Government initiatives.

- Structured, skilled and confident to support complex customer interactions
- Operating efficient services and processes with high levels of self service and automation
- Delivering agile, multi-platform digital services and support, underpinned by capable tooling
- Clear, flexible, governance and controls (in a ‘mutual’ framework)
- Commercial mindset with measurable outcomes
- Reporting data and analytics to provide full service transparency
- Collaborating with partners to manage change
- Ready to onboard new clients and develop new services
- Perceived as a leading public sector services provider

Key strengths

In growing the organisation, we are not pursuing profits, rather, as a not-for-profit organisation, we see a clear market need we can meet that adds increasing value to the public sector. We will work in partnership with public sector organisations that value our strengths and approach to creating mutual benefit. Our key strengths are :

Public sector ethos and insight

- Deep understanding of public sector financial, political and policy-making framework
- Mutually owned, cost effective, not for profit organisation with public sector ethos

Change delivery and flexibility

- Agility to leverage or adapt services at pace, to deliver Government priorities quickly and securely, with no procurement or contract negotiation complexity
- Total cost transparency with no margin

Proactive and forward thinking

- Works in close partnership with clients to evolve service offering and anticipate future public sector needs
- Brings best practice business change, leveraging close supplier relationships

High quality professional service

- Data reliably, safely and securely managed
- Services efficiently delivered with compliant processes
- Quality focus for customer service

Nationally distributed talent

- Diverse, inclusive and highly engaged workforce across UK regions
- Growing own talent and committed to investing in skills development and capability building

We understand how we will continually enhance these strengths, so they are more than words on a page, and they continue to be appreciated by our partners, from direct experience. Working with UKRI to leverage SHARP and the Matrix Transformation Programme will be at the heart of our transformation journey.

Market Opportunities

Expanding the business as we partner with more clients will provide greater value for money for the public purse. Building a larger, publicly owned shared services provider will bring clients economic value through scale. Unit costs will reduce through leveraged infrastructure, standardised processes and tools. Growth in capacity will bring greater flexibility to meet new demands while continuing to deliver a quality service and excellent user-experience. Experience will accelerate innovation and data insights with access to a broader base of best practice.

Whilst we focus on our current partners and supporting transformative change programmes in the coming years, we will be maturing the significant benefits already recognised by our current clients and the Matrix Programme, including:

- UKSBS will get straight to work, **delivering value earlier** than an outsource alternative
- We will deliver great user experience combining intuitive technology with excellent customer support
- We love to **explore new technologies** and will **exploit SaaS innovations** to deliver value to our users
- We will deliver **financial savings** reducing cost per user by over 40% in 5 years and delivering **change at cost**
- Things change; **we work flexibly** and can **adapt our plans** with no profit margin if Government priorities change
- We will r**educe energy, water use** and **carbon footprints** of Matrix services, technology and sites
- We understand the change journey and will **support business change** to help Departments realise benefits
- With a shared public sector ethos, we work in **genuine partnership** with our clients with flexible ownership options
- We will **welcome public servants** transferring from other service teams into our **diverse, inclusive culture**

We will also work to build our external profile and brand awareness as our reputation for service excellence and programme delivery is secured.

As we deliver this plan, we will leverage these benefits to explore opportunities to harmonise services and processes for existing clients alongside collaboratively exploring potential additional services. In the coming years, we will also explore providing current services to adjacent markets and the opportunities to our partners should we expand into new services.

Expand current services to existing clients
Build on existing client relationships in the short term to offer a fuller range of current services to clients.
Seek to ameliorate client cost pressures.

Provide current services to other Gov Depts
Provide services to the Matrix cluster, as the preferred shared service supplier. Focus on core services with the option to also support additional services.

Provide current services to adjacent markets
Subsequent to onboarding Matrix departments, explore adjacent public sector markets that fit agreed prioritisation criteria, such as associated ALBs.

Expand into new services
In the medium/long term, explore opportunities for new services. Only to be considered earlier if coincidental opportunity to support a new client.

Measuring success

The UKSBS Management Information Framework reports progress as we deliver our challenging and ambitious plan to the Board, Executive and our partners. It includes:

- Delivery of the key Business Plan themes and major change programmes
- Management of key risks
- People effectiveness and engagement
- Key partner issues (relationship management)
- Financial performance versus agreed budgets
- Service performance against Key Performance Indicators (KPIs) agreed with our partners in the Partnership Services Agreement.

Alongside hard data we also consider partner feedback, user experience data and client service management reviews.

Our ten **Key Business Plan** outcome measures are detailed at Annex A. These directly align with the GSS imperatives of user experience, value for money and standardised processes:

Efficiency and value for money

- Core service, cost per user
- % of Self-serve and automated processes
- Engaged workforce

Better experience for all users

- Securely managed processes and data
- Payroll accuracy
- % of Contacts resolved, right first time
- Net Promoter Score (NPS)

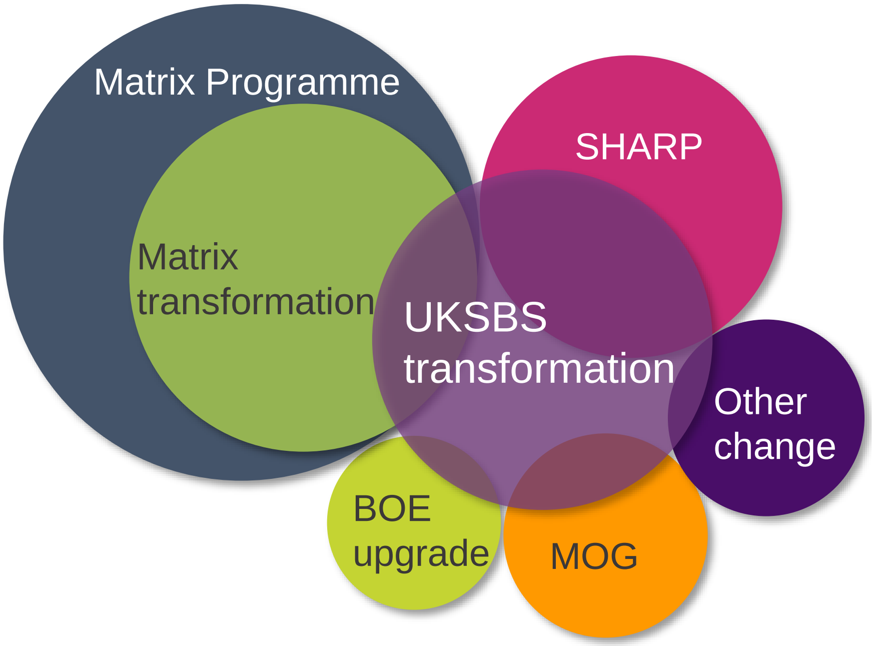
Standardised processes and data

- % of Compliant Service Requests received, right first time
- Number of process improvements implemented
- % of Service lines with centralised data

The plan

There is much to do to ensure UKSBS is the transformed organisation that will deliver our vision; we understand our current position and have a full appreciation of where we need to be. We have a clear path ahead of us which we are confident in delivering.

Key to its success will be recognising the critical milestones of the range of major programmes UKSBS will be involved with, leveraging synergies whilst ensuring individual activities have appropriately dedicated teams. Detailed planning, appropriate resourcing and early recognition of interdependencies will be managed through established programme governance.



In support of these major programmes and achieving our vision and organisational transformation, planning focuses on five themes; further information can be found at Annexes B - F.

1

User and Client Experience

We will be providing a highly-rated customer experience, underpinned by an effective partnership approach and a deep understanding of the customer journey to drive improved customer satisfaction, quality and innovation.

End user experience of our services will be mobile, digital, intuitive and engaging. Adoption of new SaaS ERP/HCM platforms will contribute significantly to this, implementation of Oracle Fusion with UKRI in 2024/25 being the first.

The ERP platform used by our other Government clients will be upgraded to the latest version of Oracle EBS in the same time frame, ensuring that it remains properly supported until replaced by the Matrix Programme.

Our Customer Services Strategy will ensure that we continue to develop our strong user focus through the application of omni-channel technology, virtual assistants and generative AI. Complementing our customer engagement approach, we will use data mining and analytics to enhance our understanding of the customer journey and to identify and prioritise improvements. Where there is interaction with service agents, users will feel respected, listened to, understood and informed.

Further investment in growing and professionalising our partnership approach will ensure we effectively respond to existing and future clients' expectations, as our roster of partners grows. Client governance will be adapted to better focus on specific client needs whilst also reflecting the increase in clients and the different enterprise platforms for UKRI and our government clients.

Clear user and client feedback loops will be in place with average satisfaction scores rising from today's user scores of 6-7 to 8-9 out of 10. Data analytics will provide transparency around emerging trends and lead our focus on service quality improvements.

By April 2025 we will have:

- Implemented Oracle Fusion for UKRI users
- Refreshed our approach to capturing and analysing user and client feedback
- Developed our expertise in CX analysis and journey mapping
- Used CX analysis and journey mapping to improve user experience in high frequency journeys
- Applied a more effective Triage methodology
- Completed a joint review of the KPI and SLA framework with our clients

2

Service excellence

We will have delivered a step change in both service quality and the cost to serve, establishing practices that continually improve efficiency and performance and drive continuous improvement.

An industry standard tiered service delivery model is in place and will be matured as new clients on-board and requirements are identified.

Our cost to serve (core services) will reduce by 40% and efficiencies will increase as we work with our partners to simplify, standardise and digitise policies and procedures, eliminating duplicated and unnecessary effort. Continuous Improvement will be culturally embedded, resulting in increased service quality. The exploitation of technology enhancements will support our agents, providing them with time to add value to more complex queries.

Using our expertise in Lean Agile methodologies, we will work collaboratively with partners to maximise the SaaS value chain for our two ERP Platforms (SHARP-Fusion and Matrix solution) from suppliers through to our clients, expertly managing the drumbeat of quarterly systems releases alongside other client required changes. We will keep up to date with technology innovations and service excellence through foresight analysis.

We will build on our track record to flexibly deliver, at short notice, our partners' new policy imperatives.

As we continue to delivery our data strategy, we will expand the availability of data, analytics and service insights to clients.

By April 2025 we will have:

- A suite of updated strategies covering Customer Service, CI, Enabling Technology and Data
- A new Data and Analytics service offering
- Delivered process efficiencies in payroll, Joiners / Movers / Leavers and Purchase-to-Pay
- Improved service delivery planning by drawing on work volume forecasts and analytics
- Rolled out CI methodology across our service teams
- Clarified and fully embedded our Tier 1-3 services
- Digitised our service catalogue

3

Cost Effectiveness and Transparency

We will be providing full transparency of the cost to serve, enabling better informed service design, change and innovation and enhanced partner dialogue.

UKSBS' service costs already compare favourably with other providers, as a mutually owned not-for-profit shared services centre. Drawing on the opportunities offered by new SaaS platforms, we will develop greater granularity and transparency of our costs, to enable better informed service design, change and innovation and enhanced partner dialogue. The benefits derived from change and improvement initiatives will be evidenced.

Increasing client and user numbers will spread fixed costs more thinly, reducing cost per user. A revised charging model will be developed to reflect and support this increase in client and user numbers, providing a clear reflection of service usage. Greater transparency around charges will incentivise end-to-end efficiencies. The model will allow investment in enabling technologies to avoid technical debt whilst ensuring that all change continues to be delivered at cost.

By April 2025 we will have:

- Refreshed our cost model
- Extended the use of our capacity modelling tool
- Included cost transparency in our reports to partner stakeholders
- Analysed charging model options
- Applied a standard benefits tracker

4

Organisational design

We will have optimised the organisation with the right structure in the right locations to deliver an efficient service and support the attraction and retention of talent.

Our overall organisational design will adapt to ensure effective interoperability with our clients and the multi-platform nature of our current business. By integrating our Tiered Service Delivery Model with clients' retained teams, we will be able to maximise end-to-end benefits. We will review and optimise our locations as the client roster increases, ensuring all locations offer enduring career opportunities and organisational resilience.

By providing greater clarity around roles and responsibilities, we will ensure that teams are properly equipped to work effectively together to get the best results. A standardised approach to team structure and service delivery management will be supported by data insights. Increased operational rigour and accountability will be balanced by a culture of agility and empowerment.

Driven by the needs of our organisational design and operating model, we will continually enhance and develop our technical architecture to ensure optimum delivery.

By April 2025 we will have:

- A refreshed Operating Model in place for Fusion clients
- Applied position management across the organisation
- Updated our spans of control for Fusion client services

5

Engaged workforce

Targeted investment in our people will have delivered a step change in performance through an engaged and motivated workforce that has the right capabilities and skills.

Our increasingly sophisticated workforce planning will ensure we right size the organisation to meet the evolving concurrent demands of quality service, value for money and major programme delivery. As our business grows, we will strengthen our leadership depth across a range of operational, change, commercial and digital disciplines.

We aim to build a reputation as a Centre of Excellence for shared services education and learning as we focus on growing our own talent through apprenticeships and graduate schemes. We will leverage our supplier partnerships to bring additional knowledge, expertise and capacity to the organisation, as well as a greater commercial mindset. Targeted internal activity and coaching will reinforce behavioural change, inculcating a proactive customer focus constantly striving for continuous improvement and agility.

Our approach to performance development and reward will be aligned to our culture and demanding expectations of the team. Our commitments to Equality, Diversity and Inclusion and Corporate Social Responsibility will be fully reflected in our employee value proposition, as we know this is vital to attracting, engaging and retaining the committed public servants we need for success. We will maintain our already commendable levels of employee engagement.

By April 2025 we will have:

- Strengthened our workforce planning approach and tooling
- Reinvigorated our apprenticeship scheme
- Designed a graduate entry scheme
- Delivered priority skills training in support of our new technologies
- Undertaken a cultural audit
- Implemented leadership development initiatives
- Applied a new appraisal approach

Governance

DSIT is our sponsor Department of State and, together with DBT, DESNZ and UKRI, are our shareholders.

Governance will evolve further as we design a straightforward approach that accommodates additional Matrix Cluster shareholders to leverage 'Teckal' opportunities whilst exerting appropriate high-level control and investment oversight through the owner appointed Board. The ownership model supports the company in managing multiple services, to multiple clients, enabled by multiple platforms.

UKSBS services are governed through a Partnership Services Agreement (PSA) with current owners. The PSA includes service schedules, escalation and relationship management protocols, data handling, assurance reporting and business continuity. This will be updated to reflect changes in ownership and any differences in services and service delivery / change management for each platform, with senior level Partnership Service Planning boards directing change delivery and service quality improvement. The funding model will also evolve into a pricing/charging model to provide a much clearer relationship and line of sight between service demand, BAU funding and service performance.

Funding

Our owners are our clients and only pay the actual cost of delivering service and change.

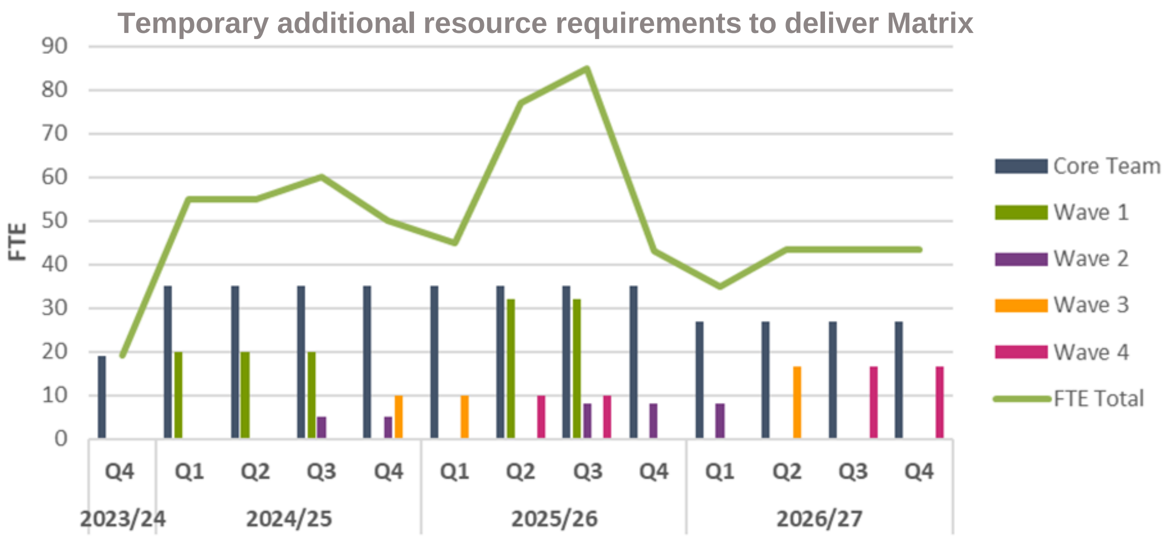
Whilst the headline cost base will increase, reflecting a doubling of user numbers, inflation-adjusted end-to-end cost-per-user will fall as new technology and ways of working bring efficiencies for UKSBS and its clients.

UKSBS provides a broad range of value adding additional services including Procurement, Treasury Forecasting, Transparency Reporting and VAT advice, considerably wider than the transactional services from many shared service providers. Whilst some of these services are provided to our government clients, UKRI is currently the major user of these services, as reflected in the charges.

Delivery of the Matrix Programme will see a 50% increase in end users with a commensurate increase in activity volumes for core services[6]. This will be reflected in a rebalancing of charges between government and UKRI clients and costs between standard and additional services.

To successfully deliver the step change transformation of UKSBS, SHARP optimisation and the Matrix Programme we will see a significant temporary increase in funding requirements, most noticeably for additional resources, a combination of

[6] Finance, HR and Payroll core services aligned to GSS strategy.



UKSBS will continue to work transparently with partners to agree capital and operational funding requirements and budgets. The increase in overall costs as the business grows is illustrated below[7]. This shows that licences become a higher proportion of costs with the move to SaaS, IT inflation costs negates other savings, and that service delivery and allocated costs reduce as a proportion of the cost base.

Illustrative Cost Changes:

Cost	2023/2024		Mid-point		2028/29	
	£m	%BAU	£m	%BAU	£m	%BAU
Direct – core services	6.2	15.3%	8.3	14.0%	8.6	13.1%
Direct – additional services	12.4	30.6%	17.4	29.9%	19.2	29.2%
Allocated costs	10.3	25.4%	14.2	24.4%	15.4	23.4%
IT Support	6.6	16.3%	9.5	16.3%	10.7	16.3%
Licences	5.0	12.3%	8.8	15.1%	11.9	18.1%
Business as Usual (BAU) sub-total	**40.5**	**100%**	**58.2**	**100%**	**65.8**	**100%**
Programme / Change	24.6		15.0		4.0	
Total	**65.1**		**73.2**		**69.8**	

[7] These high-level estimations are to indicate the likely overall shape of the cost base and should not be seen as spending review input or funding request

Annexes

Annex A – Strategic KPIs

Our ten Key Business Plan outcome measures are directly aligned with the Government's Shared Services Strategy objectives.

	Key Performance Indicator	Description
Efficiency and value for money	Core service, cost per user	Measures the efficiency of core services, including overheads, reflects economies of scale as our customer base grows
	% of Self-serve and automated processes	Reflects the number of processes requiring minimal manual processing; is currently being defined by the Matrix Programme
	Engaged workforce	Staff satisfaction score, captured through employee surveys
Better experience for users	Securely managed processes and data	Formal assurance provided regularly to clients
	Payroll accuracy	The percentage of employee and pensioner payslips paid on the correct day with the correct value, one of the most important things we do
	% of Contacts resolved, right first time	Covers service requests in year one, as an immediate measure of customer satisfaction. This will be expanded to include all contacts in future years
	Net Promoter Score (NPS)	The standard NPS metric, a Core KPI measuring end-user satisfaction in the Shared Services Strategy for Government
Standardised processes and data	% of Compliant Service Requests received, right first time	The percentage of service requests meeting client obligations as set out in the service schedule, giving a measure of standardisation
	Number of process improvements implemented	Cumulative number of process standardisation improvements delivered at any point within the end-to-end process
	% of Service lines with centralised data	Measures the share of our service processes with data held in a centralised data store ready and easily accessible for automated exploitation

Annex B User and client experience

		2024/25				2025/26				2026/27		2027/28		28/29
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	H1	H2	H1	H2	Yr
User and Client Experience: Strategy	**Current** ◦ Customer Service Strategy and Delivery Plan in place. ◦ Strategy has been socialised across the business. ◦ Tool (PIRT) is available to capture client engagement information	◦ PIRT is used by all senior leaders to capture client engagement information ◦ Partner Engagement Plans developed and applied ◦ Customer commitment principles are defined	◦ Senior leaders are using the Customer Service Strategy to identify and prioritise improvement initiatives	◦ PIRT outputs are used to support seamless and consistent engagement with clients ◦ Sentiment analysis informs Customer Service Strategy		◦ Customer insights inform corporate strategy								
Understanding Customer Expectations	**Current** ◦ Basic understanding of customer expectations and needs across all teams.	◦ Review of current feedback mechanisms to identify gaps and opportunities	◦ Customer engagement principles are defined ◦ Agreed feedback mechanisms in place ◦ Automation of customer sentiment and verbatim satisfaction feedback			◦ Professionalisation of Customer Service through ICS training ◦ All leaders have business partnering capability					◦ Accreditation and benchmarking with ICS			
CX & Journey mapping	**Current** ◦ Journey mapping takes place on an *ad hoc* basis	◦ Basic CX analysis and mapping in place for high frequency journeys			◦ CX analysis and mapping in place for high value journeys			◦ CX analysis and journey mapping is embedded as a tool to direct improvements						

Annex B

User and client experience

		2024/25				2025/26				2026/27		2027/28		28/29
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	H1	H2	H1	H2	Yr
Digital User Journey	**Current** ◦ Route into UKSBS is clearly signposted. ◦ Most forms are digitised	◦ Clear and consistent triage methodology applied ◦ All transactional, repetitive tasks are digitised / automated ◦ Omni-channel mix is defined		◦ Clear principles for contact channel use are rolled out ◦ Current and to-be channel options defined ◦ Capability to service the channels is defined ◦ Digitised forms as standard across all service areas ◦ Application of push campaigns to influence behaviours			◦ Virtual Assistance available for high volume journeys ◦ Guided process and user tips to support self-service take up. ◦ Simple Agent Assist available			◦ Progress updates provided on all user journeys. ◦ Agent Assist provides guided next steps ◦ Simple RPA in place		◦ RPA, Virtual Assistance and Agent Assist integrated across all services		
Metrics	**Current** ◦ KPIs focus on quantitative measures ◦ Generic PowerBI reports provided to clients	◦ Basic sentiment analysis in place ◦ UKSBS NPS and CSAT approach is clarified		◦ NPS approach is updated to reflect industry standard practice ◦ CSAT approach is applied ◦ Data analytics showing emerging trends provided to clients ◦ Joint review of KPI SLA framework with clients		◦ Core set of qualitative measures are included in our service reports				◦ Data analytics showing emerging trends, likely risks and recommended proactive actions provided to clients				

Annex C Service excellence

		2024/25				2025/26				2026/27		2027/28		28/29
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	H1	H2	H1	H2	Yr
CI Strategy and Culture	**Current**													
	◦ Operational Excellence Team supports continuous improvement ◦ Continuous improvement processes and training in place for some teams	◦ Continuous improvement processes and training rolled out to Payroll and Finance ◦ CI Strategy is developed and formalised		◦ Continuous improvement processes and training rolled out to procurement ◦ CI Champions in place ◦ Information analytics in place for all teams ◦ CI Strategy is fully socialised		◦ Continuous improvement embedded as standard across all transactional teams ◦ Information analytics informs improvement priorities		◦CI Centre of Excellence support provided across the whole organisation		◦ CI Centre of Excellence support available to Users and clients				
Enabling Technology Strategy	**Current**													
	◦ Enabling technology strategy is in development	◦ Enabling technology Strategy is formalised			◦ Enabling technology strategy is fully socialised	◦ Enabling technology roadmap in place ◦ Process for regular review of technology roadmap is in place and aligned to annual funding bid process	◦ Digital foresights captured for all value streams			◦ Corporate strategy is informed by digital foresights				
Data Strategy	**Current**													
	◦ Data strategy is in development	◦ Data strategy is formalised		◦ Data strategy is fully socialised ◦ Data and Analytics Services added to the Service Catalogue		◦ Data and Analytics Services available to clients ◦ Flexible data model-based automated reporting available ◦ Pilot of process mining and process-oriented reporting			◦ Process mining and process- oriented reporting available across all services and to all clients			◦ Data and Analytics Service informs partnership dialogue around E2E improvements and service developments		

Annex C

Service excellence

		2024/25				2025/26				2026/27		2027/28		28/29
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	H1	H2	H1	H2	Yr
Process Improvements	**Current** ◦ Repeatable processes are in place ◦ Multiple processes for different clients and user types ◦ Work volumes are unpredictable and teams are reactive	◦ Internal process review undertaken for simplification opportunities ◦ Work volume forecasts and analytics are available	◦ Targeted internal processes are simplified and applied consistently ◦ Internal process standards are in place ◦ UKRI process review undertaken for standardisation opportunities ◦ Work volume forecasts and analytics are used to plan service delivery activities		◦Targeted core processes are standardised across UKRI, with minimal exception rules in place ◦ Matrix client process review undertaken for standardisation opportunities					◦ Targeted core processes are standardised across Matrix clients, with minimal exception rules in place ◦ Full E2E process review undertaken with all clients		◦ Core processes are standardised across all clients, with minimal exception rules in place		
Lean / Agile	**Current** ◦ LEAN Agile Centre of Excellence established ◦ Lean-Agile methodology is defined ◦ Lean-Agile practices adopted at project level	◦ Lean-Agile methodology adopted at portfolio level ◦ Agile Release Train in place, along with 52-week plan, for ROE & BOE ◦ Product Management framework defined		◦ Lean Agile methodology adopted at programme level ◦ Agile Release Train in place for Fusion (following SHARP go live) ◦ Product Management framework applied		◦ Lean-Agile methodology adopted across all change types ◦ Agile Release Train in place for Matrix solution					◦ Lean Agile Centre of Excellence available as a service to clients			
TSDM	**Current** ◦TSDM in place ◦Tier 1 is fully defined ◦Tiers 2 & 3 in place, with some ambiguities between boundaries ◦Service catalogue in place	◦Tier 1 fully embedded, with clearly documented and managed controls ◦Tier 2 is fully defined ◦Tier 3 best practice improvements are identified ◦Digitised service catalogue	◦ Metrics exist for all Tier 1 services ◦ Tier 2 services are fully embedded, with clearly documented and managed controls ◦ Tier 3 is fully defined	◦ Metrics exist for all Tier 2 services ◦ Tier 3 services are fully embedded, with clearly documented and managed controls		◦ Metrics exist for all Tier 3 services								

Annex D Cost effectiveness and transparency

		2024/25				2025/26				2026/27		2027/28		28/29
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	H1	H2	H1	H2	Yr
Cost Transparency	**Current** ◦ Manually-driven cost to serve calculations based on historic spend and high-level user estimates	◦ Baseline cost of individual core and additional services understood ◦ Input metrics defined ◦ Simple capacity and cost model in place for certain services ◦ The impact of key levers to improve performance and change on cost is understood.		◦ Input metrics accurately and consistently captured ◦ Cost drivers understood and integrated into cost model ◦ Capacity and cost model in place for all services ◦ Regular reports provided to internal and partner stakeholders		◦ Automated, real-time actual cost reporting model in place ◦ Self-serve MI available to internal and partner stakeholders				◦ Automated, real-time cost forecasting model in place ◦ A shared understanding of cost drivers informs partner dialogue and strategic decision				
Charging Model	**Current** ◦ Basic ability to apportion and charge for core and additional services. ◦ Service charge is reactive to owner budgets and historic user numbers ◦ Little awareness by Senior Leaders	◦ Charging model options identified and shared with owners			◦ New charging model approach agreed by owners ◦ UKSBS senior leaders are aware of their contribution to the charging model ◦ Charging model includes the necessary granularity to reflect client take up		◦ Charging model applied for UKRI (aligned to Sharp implementation) ◦ Charging model applied for Whitehall partners. ◦ Charging model transparent for all partners ◦ Charging is reviewed biannually to correct for changes to user volumes				◦ Charging model combines core and additional services with capacity for system maintenance and improvements ◦ Charging model informs strategic decisions	◦ Charging model automatically pivots to capture change in service or user volumes		

Annex D Cost effectiveness and transparency

		2024/25				2025/26				2026/27		2027/28		28/29
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	H1	H2	H1	H2	Yr
Benchmarking	**Current**													
	◦ Basic benchmarking metrics are captured on an *ad hoc* basis ◦ Benchmarking reflects what can be measured not necessarily what should be measured	◦ GBS-based benchmarking exploited ◦ Institute of Customer Services benchmarking exploited				◦ Comprehensive benchmarking approach agreed				◦ Comprehensive benchmarking is in place	◦ Benchmarking insights inform corporate strategy		◦ Benchmarking metrics and insights are used for external engagement and partner dialogue	
Benefits Realisation	**Current**													
	◦ The articulation of change and improvement benefits is inconsistent, with no standard process in place	◦ A unified process for capturing, tracking and reporting benefits is in place	◦ Benefits are captured and tracked for all change and improvement initiatives ◦ Benefit owners are identified and understand their role			◦ Financial savings made as a result of change and improvement initiatives are included in cost transparency and changing model calculations		◦ ROI of change and improvement initiatives is used in charging model forecasts						

Annex E

Organisational design

		2024/25				2025/26				2026/27		2027/28		28/29
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	H1	H2	H1	H2	Yr
Operating Model	**Current**													
	◦ Operating Model under review to meet the future needs of Fusion and Matrix	◦ Fusion (UKRI) Operating Model agreed	◦ Fusion (UKRI) Operating Model in place ◦ Matrix (Whitehall) Operating Model recommendations		◦ ICF and client retained functions interaction model defined ◦ UKSBS - ICF structure, roles and responsibilities understood and socialised			◦ Matrix (Whitehall) Operating Model agreed ◦ Mature relationship with client retained functions		◦ Matrix (Whitehall) Operating Model applied ◦ Client retained functions appreciate added UKSBS value and horizon scanning				
Organisational Design	**Current**													
	◦ Organisational design based on pre-Matrix assumptions	◦ Review of the effectiveness of spans of control and organisational layers complete ◦ Areas of specialist capacity gaps identified		◦ Position management in place across the whole organisation ◦ Spans of control and organisational layers recommendations applied for Fusion clients ◦ Analysis and recommendations for future location footprint complete		◦ Spans of control and organisational layers recommendations applied for Whitehall clients ◦ Location strategy developed and agreed with Matrix			◦ Implementation plan for future location footprint complete		◦ Location strategy implemented			

Annex F

Engaged workforce

<table>
<tr><th></th><th></th><th colspan="4">2024/25</th><th colspan="4">2025/26</th><th colspan="2">2026/27</th><th colspan="2">2027/28</th><th>28/29</th></tr>
<tr><th></th><th></th><th>Q1</th><th>Q2</th><th>Q3</th><th>Q4</th><th>Q1</th><th>Q2</th><th>Q3</th><th>Q4</th><th>H1</th><th>H2</th><th>H1</th><th>H2</th><th>Yr</th></tr>
<tr><td>Resource and Workforce Planning</td><td>Current
◦ High-level workforce planning model established, including major programme requirements
◦ Utilisation remains reactive</td><td colspan="3">◦ Workforce model developed to include roles / grades and team specific assumptions
◦ Utilisation proactive, linked to predictive recruitment</td><td>◦ Workforce planning includes internal development and progression assumptions
◦ Succession planning approach designed</td><td colspan="2">◦ Workforce and career development planning applied consistently across business
◦ Succession planning approach rolled out</td><td colspan="2">◦ Workforce, career development, succession planning and resourcing fully integrated, delivering right organisational capacity and scale</td><td colspan="5"></td></tr>
<tr><td>Early Careers</td><td>Current
◦ Strategy for early careers defined</td><td>◦ Apprentice scheme refined and relaunched</td><td colspan="3">◦ New cohort of apprentices recruited
◦ Limited graduate entry scheme designed</td><td colspan="4">◦ Apprentice scheme fully embedded
◦ Trial graduate entrants in place</td><td colspan="5">◦ Graduate scheme established</td></tr>
<tr><td>L&D Delivery: Core and Specialist Skills</td><td>Current
◦ Training needs are captured annually
◦ Multiple skills maps in place
◦ Training needs are managed at team level
◦ Core skills are defined and training in place</td><td colspan="2">◦ Co-ordinated skills and capability mapping undertaken
◦ Initial move to SaaS and Agile training completed
◦ Skills database requirements and solution defined
◦ Career pathways identified</td><td colspan="2">◦ Simple skills database in place
◦ Simple future skills horizon scanning in place
◦ Scope of UKSBS learning centre, Developme, is agreed
◦Immediate technical skills priorities addressed
◦ Further specialist training providers identified</td><td colspan="3">◦ Skills database is digitised
◦ Skills insights inform training and development focus
◦ MVP Developme delivered
◦ Centralised delivery of L&D drives consistency
◦ Future skills needs are captured across the business</td><td colspan="6">◦ Use of Developme is embedded across the business
◦ Training provision aligned to career pathways and strategic needs</td></tr>
</table>

Annex F

Engaged workforce

		2024/25				2025/26				2026/27		2027/28		28/29
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	H1	H2	H1	H2	Yr
Leadership	**Current**													
	◦ Leadership Groups in place. Leaders hip tends to be siloed and inconsistent	◦ Cultural audit undertaken ◦ Review of composition and purpose of Leadership Groups ◦ Desired leadership capabilities are defined and understood		◦ Leadership capability review undertaken, and gaps identified ◦ Leadership development needs and success criteria defined ◦ Leadership Groups reformed	◦ Leadership expectations are built into job descriptions and objectives ◦ Leadership development initiatives in place ◦Thought leadership opportunities are actively sought		◦ Shared Services thought leadership provided on an ad hoc basis			◦ Shared Services thought leadership offered across the public sector				
Performance Management	**Current**													
	◦ Annual appraisal approach in place, but inconsistently applied	◦ New appraisal approach applied (with roll-out of Fusion)				◦ New appraisal approach embedded ◦ Performance management is consistently applied		◦ Performance management is aligned to Matrix ICF						

UKSBS

Shared **Business Services**

www.uksbs.co.uk

Registered Office

UK Shared Business Services Ltd

Polaris House
North Star Avenue
SWINDON
SN2 1FF

Concept House
Cardiff Road
NEWPORT
NP10 8QQ

Queensway House
West Precinct
BILLINGHAM
TS23 2NF

Registered Number: 06330639 (England and Wales)