



# Playbook for disciplined digital transformation in public services



# A structured guide to sequencing change, governing risk and evidencing value

## The role of the playbook

This Playbook translates the Blueprint into disciplined action.

Where the Blueprint sets the intent and decision boundaries for transformation, the Playbook provides a structured way for teams to apply those decisions in practice.

It is used after leadership has clarified direction, risk posture and ambition. Its purpose is explicit. It enables teams to move forward deliberately, within agreed constraints, with documented and defensible evidence of decision-making.

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# The Playbook

## What this playbook enables

**The Playbook provides a practical structure for teams to:**

- Assess organisational readiness through structured, cross-functional evaluation
- Record and anchor conclusions before committing to further change

- Sequence work in line with risk, capacity and dependency
- Record progression decisions explicitly and defensibly
- Review value and recalibrate when required

It ensures continuity between judgement and delivery.

## How the playbook should be used

**Each phase includes:**



Structured discussion prompts



Explicit decision checkpoints



Clear indicators of progression readiness



Defined outputs to be recorded



Actions to be carried forward

## A framework to inform decisions

**The Playbook does not prescribe solutions. It provides the scaffolding for teams to:**

- Evidence their current position
- Surface assumptions and constraints
- Make proportionate decisions about what to do next



## Relationship to the blueprint

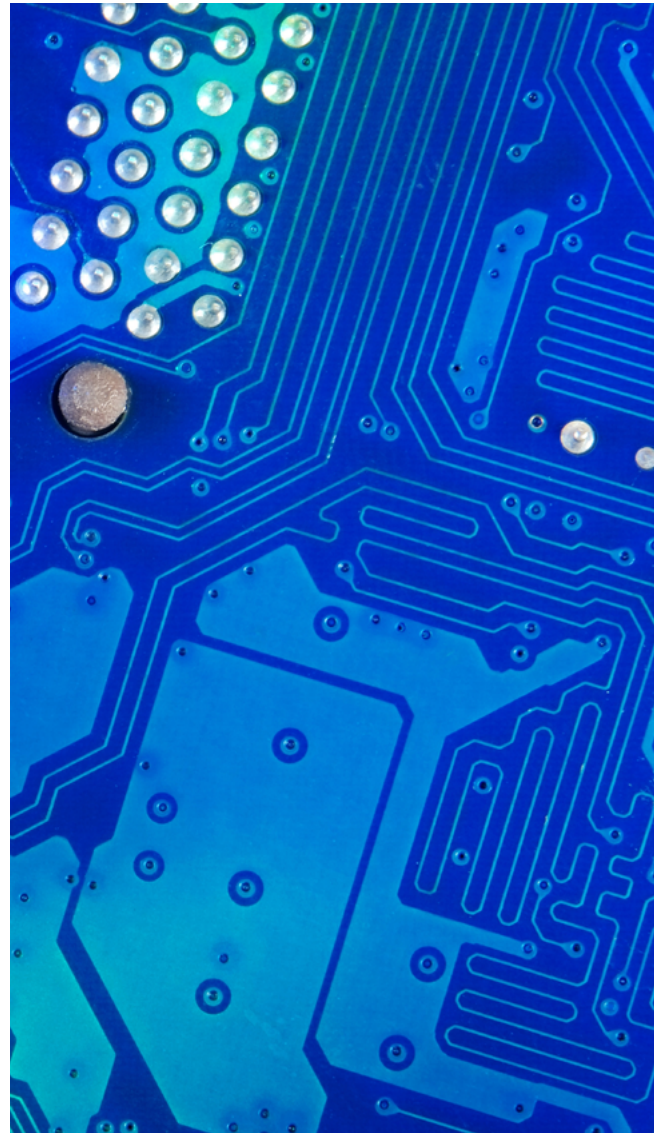
The separation remains deliberate. The Blueprint defines the decision posture. The Playbook governs structured progression within those boundaries.

## Relationship to the HMG standards

**The Playbook does not replace formal compliance mechanisms such as:**

- Government Functional Standard for Digital (GovS 005)
- The Service Standard
- The Technology Code of Practice
- DDaT Assessment Framework
- Data Maturity Assessment

Instead, it supports teams to interpret those assessments in context, ensuring that compliance informs sequencing decisions rather than driving activity in isolation.



# Digital capability levels

Every organisation enters transformation with a distinct combination of governance maturity, service coherence, workforce capability and technology condition.

The Digital Capability Levels provide a shared language for describing that current condition. They do not describe progress through the Playbook. They describe the organisational environment within which change will occur.

**The purpose of these levels is practical:**

- To surface how much change can be absorbed safely
- To identify where constraints are structural rather than temporary
- To inform how the Playbook phases should be applied

Capability Level does not determine ambition. It defines absorption capacity.

## Relationship to the Playbook Phases

Capability Levels describe where the organisation is today. Playbook Phases describe how leaders move forward from that position. Capability is descriptive. Phases are sequential.

An organisation at Level 2 may still enter Phase 2 of the Playbook, but sequencing, pace and confidence thresholds will differ from an organisation at Level 4. Capability informs progression. It does not constrain it.



## Capability Level Definitions

The levels describe broad behavioural and organisational patterns to be identified. They are not targets or grades. They provide a practical reference point for structuring discussion rather than an abstract maturity score.

### L1 Ad-Hoc

Delivery is unpredictable and siloed, often dependent on individual effort. Digital capabilities exist, but not consistently or repeatably.

AI tooling is isolated and informally governed. AI-assisted insight remains fragmented.

### L2 Emerging

Roles, processes and standards begin to form. Adoption is uneven. Governance remains reactive.

Early experimentation with automation and AI tools begins, with governance controls still emerging.

### L3 Managed

Delivery becomes more stable and measurable. Cross-functional integration improves. Decision-making is more deliberate.

AI-supported workflows are embedded within defined governance controls and monitored for performance and risk.

### L4 Optimised

Continuous improvement becomes normalised. Data is used consistently to inform assurance and service refinement.

AI deployment scales across services with explicit assurance, performance monitoring and model oversight.

### L5 Adaptive

The organisation operates as a digital organisation rather than running digital programmes. Governance, services, people and technology evolve coherently.

AI is integrated adaptively, governed continuously and aligned to policy and operational change.

## How to use capability levels

Capability Levels are used primarily in **Phase 1 (Assess and Anchor)** to:

- Ground discussion about current readiness
- Identify absorption limits
- Inform sequencing decisions

**They are not used to:**

- Compare organisations
- Set maturity targets
- Drive competitive benchmarking

They exist to support leadership judgement. They do not substitute for it.



# Maturity assessment

## There are four phases of maturity assessment

The Playbook is structured around four phases that move organisations from judgement to action. It is not a methodology to be followed mechanically.

It is a decision structure that makes sequencing, evidence and progression explicit. Each phase answers a different question. Each phase produces specific evidence. Each phase requires a deliberate progression decision.

Together, they prevent momentum from substituting for control.

### The structure at a glance:

Phase	Core Question	Evidence Anchor	Progression Decision
<b>Phase 1:</b> Assess	Do we understand our current condition?	Position statement & risk posture	Sufficient confidence to proceed?
<b>Phase 2:</b> Architect	Are governance and dependencies controlled?	Decision rights & dependency map	Structural readiness confirmed?
<b>Phase 3:</b> Accelerate	Can delivery scale sustainably?	Sustainability & control evidence	Acceleration stable?
<b>Phase 4:</b> Renew	Is delivery generating measurable value?	Outcome & risk review	Continue, adapt or stabilise?

Each phase builds on the last and progression is not automatic.

Movement occurs only when the evidence supports it.

The sections that follow explain how each phase operates in practice.

# Phase 1: Assess and anchor

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You cannot change what you do not clearly understand.

Phase 1 establishes a shared and grounded understanding of the organisation's current position before any decisions are made about pace, scope or direction of change.

Public service organisations operate under materially different conditions. Policy context, legacy estates, workforce capability, governance maturity and risk appetite all influence how much change can be absorbed safely. Phase 1 makes these conditions explicit. Its focus is clarity

## What Phase 1 is designed to achieve

Used properly, Phase 1 enables leaders to:

- 1 Establish a common view of the organisation's current condition
- 2 Distinguish structural constraints from temporary issues
- 3 Identify where confidence exists and where it does not
- 4 Clarify where stabilisation may be required before acceleration

This understanding becomes the reference point for all subsequent phases.

## How Phase 1 works in practice

Phase 1 draws primarily on existing knowledge and experience. It does not require new diagnostics or formal submissions unless confidence cannot be established through existing evidence.

Where artefacts already exist (strategies, risk registers, assurance findings), they inform discussion. Where they do not, professional judgement and lived operational experience are equally valid.

## Structured cross-functional conversation should surface:

- Divergent views of capability
- Assumptions that have not been tested
- Informal risk signals
- Areas of hidden dependency

Consensus is not required. Clarity is.

Agreement is sought only on what is sufficiently true to proceed responsibly.

## Using Capability Levels in Phase 1

Capability Levels are applied in Phase 1 as a descriptive lens.

## They help teams:

- Ground discussion in observable behaviour
- Avoid abstract debate about "maturity"
- Identify absorption limits

They are not used to assign grades or set targets.

Different parts of the organisation may reflect different levels simultaneously.

Their purpose is clarity, not classification.

## Minimum evidence and structured output

Before progressing to Phase 2, a documented Phase 1 position statement must be completed and agreed.

The position statement must record:

**Current capability condition (by dimension)**

- Strategy and governance
- People and culture
- Service design and operational flow
- Technology and data

**Identified structural constraints**

- Confirmed dependencies
- Known fragilities
- Governance gaps

**Change absorption confidence**

- Confidence level (High, Medium or Low)
- Rationale for judgement

**Agreed risk posture**

- Risks accepted at this stage
- Risks requiring mitigation before progression

**Accountable senior owner**

- Named individual
- Date of confirmation

Progression to Phase 2 must be explicitly recorded.

**What Phase 1 produces**

**Phase 1 produces a documented and defensible position statement covering:**

- Current capability condition across dimensions
- Identified structural constraints
- Change absorption confidence
- Explicit risk posture

**This output enables one of two deliberate decisions:**

- Proceed to Phase 2
- Pause and stabilise

**Clarity at this stage materially reduces over-commitment and avoidable fragility. The progression decision should be recorded explicitly, including:**

- The rationale
- The confidence level
- The principal risks being carried forward

**What Phase 1 does not produce**

**Phase 1 does not:**

- Evaluate performance
- Score maturity
- Define future solutions
- Commit the organisation to acceleration

It establishes understanding before action.

**From Phase 1 to what follows**

Progression is not assumed.

Where sufficient confidence and alignment exist, Phase 1 provides the foundation for architectural and governance decisions in Phase 2.

Where confidence is low, it provides legitimate grounds to stabilise before proceeding.

In both cases, Phase 1 ensures that subsequent action is intentional, proportionate and defensible.

# Phase 2: Architect and govern

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If Phase 1 establishes the current condition, Phase 2 establishes the control environment within which change can proceed safely. This phase focuses on structure, not solutions. It confirms that governance, architectural and assurance controls are sufficient before acceleration occurs.

## What Phase 2 is designed to achieve

Used properly, Phase 2 enables teams to:

- 1 Make decision rights explicit and documented
- 2 Align governance, architecture and assurance to the agreed risk posture
- 3 Establish visible coherence across programmes, services and suppliers
- 4 Prevent unmanaged acceleration and dependency accumulation

The objective is control before scale.

## Architecture as control discipline

**In Phase 2, architecture is treated as a control mechanism. The focus is not on defining future-state solutions, but on confirming that:**

- Systems can evolve without excessive coupling
- Data exchange standards are defined and enforceable
- AI model governance, oversight and accountability are defined before scaled deployment
- Technical dependencies are documented and visible
- Incremental change is possible without irreversible commitment



**Architecture at this stage must be sufficient to:**

- Define interoperability standards
- Control integration boundaries
- Maintain visibility of technical debt exposure

## Governance as decision clarity

Governance in Phase 2 is operational, not ceremonial.

**It must make explicit:**

- Who owns progression decisions
- Who accepts risk
- Who can pause or reset
- How escalation occurs

**Phase 2 requires documented confirmation of:**

- Decision ownership
- Risk allocation
- Assurance mechanisms
- Cross-functional alignment

If governance cannot evidence these clearly, acceleration should not proceed.

## Managing suppliers and structural dependency

Most transformation operates within multi-supplier environments.

### Phase 2 requires:

- Clear mapping of contractual and technical dependencies
- Identification of single points of failure
- Confirmation that interoperability standards are enforceable
- Evidence that supplier relationships do not determine architectural direction

Control over architectural direction and sequencing must remain with the organisation.

## Minimum evidence and structured output

Before progressing to Phase 3, structural readiness must be explicitly confirmed and recorded.

### The following must be documented:

- Decision rights register (named accountable owners)
- Architectural principles and defined constraints
- Dependency map (programme and supplier level)
- Risk allocation clarity, including accepted residual risks
- Escalation and reset pathway

## Progression decision

- Structural readiness confirmed (Yes or No)
- Remediation actions required (if No)

## Accountable senior owner confirmation

Progression to Phase 3 must be formally recorded.

The outcome of Phase 2 is confirmed structural readiness for controlled acceleration.

## What Phase 2 does not produce

### Phase 2 does not:

- Finalise technical architecture
- Approve full solution designs
- Commit to irreversible investment
- Accelerate delivery by default

It establishes structural safety before acceleration.

## From Phase 2 to what follows

### Progression to Phase 3 requires:

- Clear ownership
- Clear dependency visibility
- Clear risk allocation
- Clear escalation routes

Where these are present, delivery can scale deliberately.

Where they are not, stabilisation or architectural reinforcement should precede further acceleration.

# Phase 3: Accelerate and embed

Where Phase 2 establishes control conditions, Phase 3 governs delivery at pace. Its purpose is to confirm that delivery can scale without degrading governance, accountability or resilience.

## What Phase 3 is designed to achieve

Used properly, Phase 3 enables organisations to:

- 1 Increase delivery pace without eroding governance or assurance
- 2 Embed operating changes into normal practice
- 3 Reduce dependency on informal effort or individual resilience
- 4 Deliver repeatably and sustainably

The objective is sustainable acceleration.

## Embedding delivery into operating rhythm

In Phase 3, delivery must shift from “programme activity” to “organisational norm.”

### This requires confirmation that:

- Decision rights operate as designed
- Accountability remains explicit as complexity increases
- Learning is captured and reused systematically
- Team delivery patterns are consistent

If delivery depends on exceptional effort or localised workarounds, acceleration is unstable.



## Workforce and operating capacity

### Phase 3 requires explicit monitoring of:

- Workforce capacity and fatigue signals
- Role clarity under scaled delivery
- Escalation responsiveness
- Behavioural adherence to governance

Acceleration must be evidenced, not assumed.

## Delivery control discipline

### Phase 3 requires:

- Continuous risk visibility (not retrospective reporting)
- Ongoing dependency tracking
- Early surfacing of integration strain
- Explicit confirmation that pause/reset pathways remain viable

Where these controls weaken, pace should reduce deliberately.

### Minimum evidence and structured output

Before progressing to Phase 4, sustainable acceleration must be evidenced and formally recorded.

#### The following must be documented:

- Evidence that governance mechanisms remain effective under scale
- Confirmation that delivery patterns are repeatable and not dependent on exceptional effort
- Workforce sustainability indicators, including capacity and fatigue signals
- Updated dependency and integration map
- Explicit residual risk statement

#### Acceleration confidence status

- Stable
- At risk
- Unstable

#### Corrective actions required (if applicable)

The decision to progress to Phase 4 must be explicitly recorded by the accountable senior owner.

### What Phase 3 produces

#### Phase 3 produces:

- Delivery operating at pace without erosion of governance
- Repeatable decision and assurance mechanisms
- Confirmed organisational sustainability under delivery pressure
- Documented readiness for structured value review in Phase 4

The outcome is controlled and sustainable acceleration.



### What Phase 3 does not produce

#### Phase 3 does not:

- Assume permanent acceleration
- Replace governance with delivery velocity
- Treat delivery activity as evidence of value
- Conclude transformation

It confirms that acceleration can be sustained without degrading control.

### Relationship to Phase 4

Phase 3 prepares the organisation to assess whether delivery is generating measurable value, rather than activity or momentum.

That assessment is undertaken in Phase 4.

# Phase 4: Value realisation and renewal

Phase 4 assesses whether delivery is generating measurable value and whether the current direction remains justified.

It introduces a structured pause to evaluate outcomes, risk exposure and organisational sustainability before further progression.

This phase is not about closure.

It is about decision.

## What Phase 4 is designed to achieve

Phase 4 enables organisations to:

- 1 Determine whether delivery is improving outcomes rather than simply increasing activity
- 2 Assess the impact of change on service performance and operational resilience
- 3 Confirm that risk posture remains appropriate under current conditions
- 4 Decide whether to continue, adapt, stabilise or stop

The objective is evidence-based continuation or recalibration.

## Assessing value in practice

Value in public service transformation should be evidenced across multiple dimensions.

Phase 4 requires structured assessment of:

- Outcome performance indicators
- Operational resilience and risk exposure



- Governance effectiveness under sustained delivery, including AI model performance and oversight where applicable
- Workforce sustainability indicators
- Responsiveness to policy
- Adaptability to contextual change

Assessment should draw on both quantitative measures and qualitative evidence.

Value must be demonstrated, not inferred from delivery momentum. A “green” on delivery does not automatically mean a “green” on outcome.

### **Minimum evidence and structured output**

Before confirming continuation, adaptation or stabilisation, the Phase 4 review must be completed and formally recorded.

#### **The following must be documented:**

- Outcome evidence against agreed objectives
- Change in risk exposure since Phase 2
- Workforce sustainability indicators, including capacity and fatigue signals
- Governance effectiveness under delivery pressure

#### **Progression decision**

- Continue
- Adapt
- Stabilise
- Stop

The accountable senior owner must formally record the decision.

### **Renewal rather than completion**

Phase 4 does not assume linear progression.

It may confirm continuation at pace. It may require recalibration or stabilisation.

A decision to slow or reset is not failure. It is disciplined renewal.

### **Closing the loop**

Phase 4 reconnects explicitly to Phase 1.

#### **Following a Phase 4 review, organisations should:**

- Reassess their capability condition
- Re-evaluate absorption capacity
- Confirm risk posture under current context

Transformation is cyclical, not linear.

Each cycle should increase organisational clarity, structural control and decision confidence.

# Playbook to application

This Playbook supports disciplined judgement and structured sequencing. It is not a delivery methodology.

It can be applied directly by organisations using existing leadership, delivery and assurance capability to assess readiness, surface constraints and determine proportionate next steps.

Application will vary by context, maturity and risk posture. It may involve structured internal discussion, facilitated workshops, independent challenge or external support where appropriate.

The depth and pace of application should reflect organisational conditions, not assumed best practice.

**The Playbook provides a common operating frame that enables teams to:**

- Translate judgement into structured assessment
- Surface risk, dependency and constraint early
- Record progression decisions explicitly
- Align next steps to context and public value

How the work is facilitated does not alter the sequence or decision logic.

The Playbook anchors application in disciplined, confidence-first progression. Its value lies not in prescription, but in structured evidence of readiness and progression.



# Turning strategy into delivery with CGI

Modernising government systems is rarely constrained by ambition. Most departments understand the need to improve citizen services, unlock the value of data, and replace ageing digital infrastructure.

The real challenge lies in translating strategy into sustained delivery while maintaining the security, resilience and continuity that public services depend on.

Turning transformation principles into operational change requires experience of working within complex public sector environments, where policy, technology and operational delivery must move forward together.

## Supporting HMG and public services

CGI has spent decades supporting government organisations responsible for some of the UK's most critical national systems.

Our teams have helped modernise large-scale data platforms, strengthen cyber resilience across complex technology estates, and support the transition from fragmented legacy environments to secure, cloud-based architectures.

These programmes demand more than technical capability. They require an understanding of how government organisations operate, how risk is managed, and how transformation can be delivered without disrupting the services citizens rely on every day.

Through our proximity model, CGI teams work alongside departments and agencies across the UK, combining local domain expertise with global capability.

This approach enables organisations to reduce technical debt, improve interoperability between systems and build secure digital foundations that support the responsible use of data and emerging technologies.

In environments where public services must continue to operate under constant scrutiny, successful transformation depends not only on technical change, but on the ability to deliver that change safely, steadily and with confidence.



# About CGI

## Insights you can act on

Founded in 1976, CGI is among the largest IT and business consulting services firms in the world.

We are insights-driven and outcomes-focused to help accelerate returns on your investments. Across hundreds of locations worldwide, we provide comprehensive, scalable and sustainable IT and business consulting services that are informed globally and delivered locally.

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