



powering smarter service delivery

Introducing ServiceOne

The Sigma Connected platform powering smarter service delivery

Modern service delivery is more complex than ever. Data sits across disconnected systems, operational processes become fragmented, and teams are often forced to rely on spreadsheets, manual workarounds, and duplicated reporting just to maintain visibility.

ServiceOne was built to change that.

Developed entirely in-house by Sigma Connected, ServiceOne is our proprietary Business Process Management (BPM) platform designed to orchestrate how work flows across operations, from first contact through to resolution, reporting, and continuous improvement.

More than a traditional CRM or workflow tool, ServiceOne brings together customer and account management, operational workflows, automation, reporting, compliance oversight, and AI-enabled capability into a single connected platform.

Because we own both the technology and the roadmap, we can evolve ServiceOne quickly in line with client needs, operational change, and emerging technology opportunities – without relying on third-party development priorities or external platform limitations.

What makes ServiceOne different?

Built around real operations

ServiceOne has been designed around the reality of high-volume, regulated service environments, where governance, consistency, and operational control matter just as much as efficiency.

Designed to scale

The platform supports structured growth without increasing operational complexity, helping clients maintain visibility, governance, and service quality as requirements evolve.

Intelligent by design

AI capability is embedded into ServiceOne to support smarter decision-making, operational insight, and continuous improvement across service delivery.

Fully configurable

Workflows, reporting views, approvals, and operational controls can be configured quickly and consistently, allowing ServiceOne to adapt alongside client and operational change.

ServiceOne gives our teams and our clients clarity, control, and confidence

Orchestrating smarter, connected delivery

ServiceOne acts as both the system of record and the system of execution. It doesn't simply store information - it actively drives how work is delivered every day.

By bringing together workflows, customer data, operational controls, reporting, and AI capability in one governed environment, ServiceOne enables more connected, transparent, and efficient service delivery.

CRM and case management

ServiceOne gives operational teams a single, dependable view of customers, accounts, cases, tasks, and documents. Integrated search functionality and structured account histories help advisors and operational teams access information quickly and make better-informed decisions.

Built-in integrations and document management capabilities reduce manual administration while improving confidence in operational data and customer records.

Reporting, analytics, and insight

Operational, quality, and financial data are brought together into consistent dashboards and reporting views, allowing leaders to monitor performance, identify trends, and respond faster to operational issues.

Rather than relying on disconnected reporting across multiple systems, ServiceOne creates a single operational view that supports clearer decision-making and more productive client conversations.

Workflow automation and operational control

At the heart of ServiceOne is an intelligent workflow engine designed to remove unnecessary manual effort from day-to-day operations. Rules, triggers, notifications, and task automation ensure the right activity happens at the right time, while maintaining clear accountability and visibility across teams.

Complaints, quality, & governance

Regulatory confidence is embedded into the platform rather than layered on afterwards. Structured complaints handling, audit trails, configurable QA workflows, and governance checkpoints help ensure every process remains traceable, measurable, and controlled.

Client data governance disclaimer

All data within ServiceOne is managed on a client-specific basis. We do not aggregate or combine data across clients, ensuring full compliance with data governance and confidentiality requirements.

Using AI to enhance ServiceOne

AI within ServiceOne is focused on one thing – helping people make better decisions faster.

Rather than acting as a standalone feature, AI is embedded into how the platform analyses operational data, supports advisors, and identifies opportunities for continuous improvement.

Smarter quality and insight

AI already supports call scoring and theme mining across operations, helping identify coaching opportunities, operational friction points, policy gaps, and emerging trends that may otherwise remain hidden within large volumes of operational feedback.

This allows leaders to move beyond reactive reporting and respond to operational challenges earlier, with greater confidence and visibility.

Workforce intelligence

ServiceOne is also supporting AI-driven workforce insight through attrition analysis and operational trend monitoring. By analysing operational and workforce data together, the platform can help identify patterns, correlations, and early indicators that may impact service performance and workforce stability.

Future development includes AI-backed shrinkage analysis and broader predictive operational insight capability.

Real-time advisor support

When advisors open an account, ServiceOne can generate AI-powered summaries of recent behaviour, key signals, and recommended next best actions, giving teams immediate context without needing to navigate multiple systems or lengthy account histories.

The result is faster understanding, more informed conversations, and more consistent customer outcomes.



Looking ahead

The ServiceOne roadmap continues to evolve, with future capability including:

- AI-driven workflows
- Account and campaign-level AI summaries
- Sentiment analysis across social and digital channels
- Client self-service functionality
- Expanded communication channels including messaging capability
- Deeper business intelligence and operational insight integration

“ Helping clients move from **hindsight** to **foresight** ”

 **ServiceOne**

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Ian Gerleman

Chief Technology Officer



With more than 25 years' experience leading technology, architecture, and innovation across both growing businesses and large enterprise environments, Ian plays a key role in shaping the strategic direction and development of ServiceOne.

Combining deep technical expertise with a strong understanding of operational delivery, Ian specialises in using technology to simplify complex processes, improve scalability, and enable smarter, more connected service delivery. His experience spans software development, infrastructure, security, networking, and platform architecture, helping ensure ServiceOne is designed to be secure, flexible, and built around real operational needs.

Ian holds a degree in Physics and Electronics, alongside a PhD in semiconductor technology, bringing a highly analytical and innovation-led approach to the continued evolution of the ServiceOne platform.

Alex Crane

Head of Engineering & Platform Solutions



With more than 13 years' experience across the BPO and technology sectors, Alex plays a key role in the strategy, architecture, and continued development of ServiceOne.

Specialising in data architecture, analytics, governance, cloud strategy, automation, and machine learning, Alex focuses on using technology to simplify operational complexity and deliver smarter, more connected service delivery. His experience in building scalable data infrastructure and operational platforms helps ensure ServiceOne is designed around real-world operational needs, while supporting greater visibility, efficiency, and decision-making.

At Sigma Connected, Alex has built and led multiple analytics and data functions, bringing together engineers, analysts, and operational experts to create practical solutions that drive measurable business impact. His work continues to support the evolution of ServiceOne as an intelligent, scalable platform built around operational agility, insight, and continuous improvement.

The team behind ServiceOne

ServiceOne is delivered by a dedicated, UK-based team with deep experience in AI and operational insight, data and analytics, reporting and MI as well as systems integration and platform architecture.

Built and managed in-house, the platform is backed by experienced operational and technology leaders, ensuring continuous improvement, strong governance, and the flexibility to evolve alongside client needs.

Built to support better partnership

ServiceOne is already embedded within live client operations across Sigma Connected and supports a range of complex, regulated service environments. In every case, it helps create greater operational visibility, stronger governance, and more connected service delivery.

Because workflows, reporting, operational metrics, and quality assurance are connected in one platform, ServiceOne helps clients move from retrospective reporting to more proactive, insight-led partnership.

Greater flexibility, better customer outcomes

ReachOut partnered with ServiceOne to create a more flexible, responsive and customer-focused operating model, enabling the team to adapt services more quickly to changing client and customer requirements. By bringing greater control in-house, ReachOut reduced reliance on third-party suppliers and gained the ability to implement operational changes, workflows and campaigns far more efficiently.

The platform has also improved day-to-day service management, giving teams greater visibility across the full customer journey and enabling issues to be identified and resolved earlier. The simplicity of the user interface, at both advisor and administrator level, has streamlined onboarding, workflow creation and account management, making it easier to track customer history and determine the most appropriate next steps. These ongoing improvements have strengthened ReachOut's ability to deliver a more joined-up, efficient and empathetic service for both clients and the customers they support.

Delivering more joined-up, scalable service delivery

By combining operational flexibility, workflow automation, customer visibility, and integrated reporting within a single platform, ServiceOne has helped ReachOut create a more connected and scalable delivery model.

- Faster implementation of operational and workflow changes
- Reduced reliance on third-party suppliers
- Improved visibility across customer interactions and outcomes
- More efficient onboarding and campaign management
- Clearer operational oversight and reporting
- Greater agility in responding to client and customer needs
- A more consistent and empathetic customer experience

More than a platform

ServiceOne is a strategic asset that gives Sigma Connected the control needed to scale while strengthening governance, operational visibility, and client partnership.

As the platform evolves, it will continue to create opportunities for smarter service delivery, deeper operational insight, and technology-enabled innovation that benefits both our clients and their customers.

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