PROTECH

Achieve More.Together.

PROCONNECT

Software for Membership &
Professional Development

SERVICE DEFINITION

Digital Marketplace

PROCONNECT E-PORTFOLIO AND CPD MANAGEMENT

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Contents

Contents 2
About Protech 3
ProConnect Customer Relationship Management (CRM) 4
ProConnect Website Creation 4
ProConnect Portals 5
ProConnect CMS 5
A Selection of our Portfolio of Clients: 6
ProConnect E-Portfolio and CPD Management 7
Features 7
Benefits 7
Hosting and Infrastructure 8
Additional Information 9

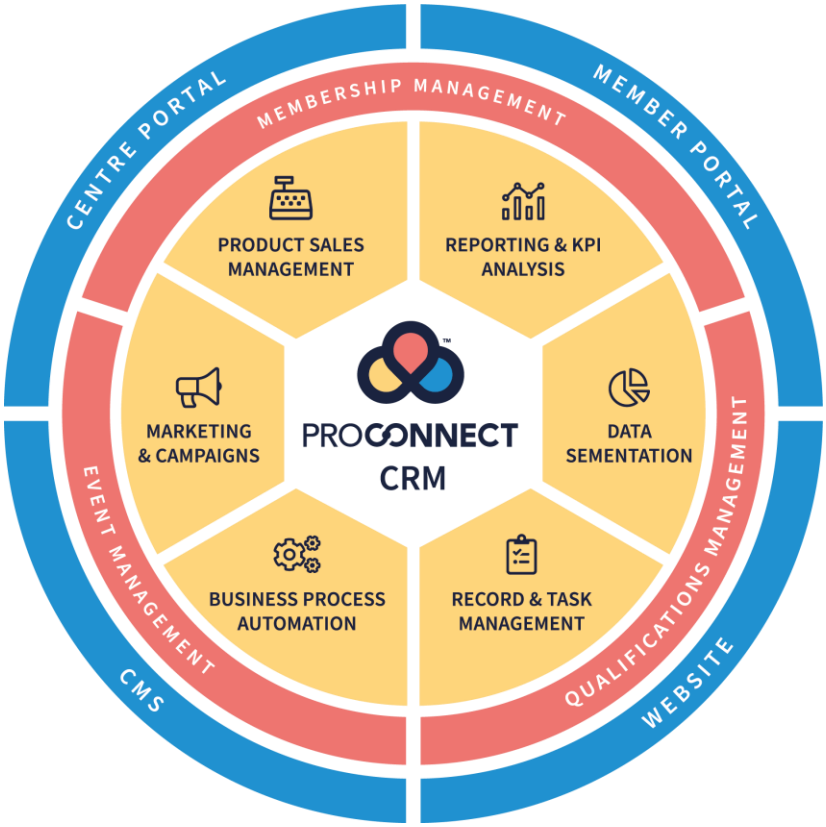
About Protech

Protech has been providing specialist software for NFP organisations for almost 25 years. Today, some of the country's most respected organisations rely on our ProConnect™ software to administer professional qualifications, serve their members and manage complex events.

At the heart of our solution is ProConnect. This powerful engagement management software improves the productivity and efficiency of our client's operations. It automates manual processes and helps to predict customer demand through comprehensive data analysis. The software also provides clients with a single customer view which enables them to interact, engage and transact with their members, learners and customers.

Our sector-specific web user-journeys increase member retention and recruitment. They allow members to easily undertake self-service tasks such as renewals and joining, event registration, exam enrolment and preference setting. This improves the member experience, drives engagement and enhances membership value.

ProConnect includes a suite of customer-facing solutions for website creation, portals and content management systems (CMS), all underpinned by our specialist customer relationship management (CRM) functionality. Together they allow ProConnect to deliver tangible member benefits, improve event experiences and more effectively guide learners through their CPD and qualification journeys.



ProConnect Customer Relationship Management (CRM)

The powerful CRM within ProConnect provides a number of tools to efficiently and effectively manage the online experience of members, learners and customers.

For our clients, the single customer view within this CRM gathers all the information in one place, including events attended, transactions completed, qualifications achieved and membership history. The engagement index shows how effectively members or customers are engaging with the organisation thereby facilitating more informed strategic decision making. The CRM can also manage back-office payment processing and distribute bulk communications using sophisticated data segmentation tools while providing fully featured reporting and KPI analysis dashboards.

The CRM provides options to customise the user experience by modifying elements such as screen display, categorisation of records, form fields and tool tips. It fully integrates with Microsoft Outlook to synchronise appointments, enable automatic task creation and allow drag-and-drop functionality from the inbox.

All of these features allow our clients to improve their service, make better decisions, and eradicate unnecessary manual processes within their organisations.

ProConnect Website Creation

ProConnect ships with ProWeb, a feature that enables clients to provide class-leading online service functionality to their customers.

This module combines our secure web services to easily integrate a client's back office operations with their existing website. Alternatively, ProWeb can be used to design entire new websites, microsites or portals. In this case, clients can use our CMS to upload their own content and forms and offer streamlined user journeys around their membership processes.

ProWeb can also be used to create job boards, an important element for any business that wishes to drive recruitment and employee retention. Additionally, ProWeb includes powerful collaboration tools that allow members and other key stakeholders such as volunteers to create, join and participate in forums, blogs and online communities.

Like all ProWeb features, this is fully integrated with ProConnect CRM so that online forum, blogging and community-based activity is captured as part of the single customer view.
Examples of sites created using ProWeb include the Association for Project Management and the Chartered Institution of Highways & Transportation.

ProConnect Portals

ProConnect can be used to create two types of portals for membership organisations or those offering professional qualification. In both cases, these portals streamline the processes involved in member and learner management and enrich the user experience for their customers.

Member Portals provide a personalised area for an organisation's members to perform self-service tasks and access relevant information around their membership. Fully featured dashboards can display the events attended, groups participated in, and the posts added – all in one place and all tailored precisely to the user. They also allow the setting of preferences, profiles and communication rights.

Centre portals help learning organisations to accredit and manage their learning centre locations. Its lead-management functionality can assist in negotiating fees and licences whilst comprehensive documentation management tools ensure accreditation standards are reached and maintained.

ProConnect also simplifies the administration of qualifications, providing a single portal for all resources and information on the student lifecycle.
In doing so, the centre portal seamlessly self-serves candidate registration, communications, results processing and other key centre management features.

ProConnect CMS

ProConnect leverages the well-established Umbraco CMS to help clients achieve an enhanced digital experience for their members. It has no-cost open-source licensing, is simple to use, and has almost unlimited potential. Umbraco is also robust enough to run sites for some of the largest membership, affinity and media organisations in the world.

Another attraction of this CMS is how easy it is to learn for content creators, webmasters, and web developers. Supported by an active global community of users, Umbraco can deliver beautiful, fast websites for desktop browsers while simultaneously providing an enhanced mobile experience from the same single set of content.

Another of its core strengths is flexibility. By using the Umbraco API, we can easily customise or add to ProConnect's features based on client requirements.

It is built in Microsoft's .Net framework so be seamlessly integrates with other Microsoft technologies and shares their industry-leading security protection. Using this CMS within ProConnect allows us to create every kind of fully-featured website while still making it simple for clients to maintain and update content.

A Selection of our Portfolio of Clients:

ProConnect E-Portfolio and CPD Management

Protech's ProConnect e-portfolio and CPD management solution supports professional awarding bodies and NFP organisations to simplify the tasks within learning management and specifically e-portfolio and CPD management. Its software supports organisations to help organisations candidates to track and upload CPD progress through a consolidated e-portfolio view.

Features

- Provide a streamlined self-service online portfolio completion for learners
- Allows candidates to manage their own learning and guides them through reflection, planning, actions, outcomes and evaluates performance
- Enables members to record activities, add reflection and upload evidence of learning such as completion and results certificates
- Online CPD and qualification enrolment
- Automated administrative processes including communications, registration and confirmation configurable frameworks and objectives and shared resources
- Configure and track CPD points or time allocation based on learning activities
- Reporting to demonstrate compliance, quality assurance and learner trends
- Information in a single view showing learner progression and preferences

Benefits

- Enhanced learner experience from enrolment through to CPD completion
- Eradicates time consuming manual processes
- Provides learner with control of their own CPD journey
- Improved and faster business decisions through accurate and timely information

Hosting and Infrastructure

Protech provides two SaaS Hosting options for the ProConnect CRM. Our UK datacentre partners offer highly secure, flexible and available hosting solutions for the ProConnect CRM with options for both secure Government 'OFFICIAL' security accredited and non-accredited, commercial Cloud platforms.

Connectivity to our services is over the public internet and / or Public Services Network (PSN). These services provide a real time public cloud infrastructure. This is available to any size business and removes the need to purchase, manage or maintain infrastructure to underpin the ProConnect CRM.

Complete control of the environment is provided including the OS, network and compute resources. Both hosting options are supported by UK based operations teams.

Commercial Community Cloud

The option provides Hosting and Service Management of the ProConnect CRM in our multi tenanted Cloud. The ProConnect CRM is Pan Government Accredited (with the enhanced Regime for Policing) at Business Impact Level 3 and is suitable for processing data at Impact Level 3 and below.

The Community Cloud is not a Pan Government Accredited hosting platform and does not currently provide a connection to the PSN (Public Services Network) as standard.

This is a highly cost-effective model for organisations operating at Business Impact Level 0. As the ProConnect CRM is Pan Government Accredited (with the enhanced Regime for Policing) at Business Impact Level 3, you can be confident that your data and security are protected in accordance with the stringent requirements of this standard.

Government Security Accredited Community Cloud ('OFFICIAL')

The option provides Hosting and Service Management of the ProConnect CRM and specialist modules in our Pan Government Accredited (PGA), multi tenanted Public Sector Cloud.

The ProConnect CRM and hosting platform is accredited (PGA with the enhanced Regime for Policing) at Information Assurance / Impact Level ('OFFICIAL') and data handling level ('OFFICIAL SENSITIVE').

The Government Security Accredited Community Cloud ('OFFICIAL') provides a connection to the PSN (Public Services Network) as standard. As the ProConnect CRM and hosting platform is Government Security Accredited you can be confident that your data and security are protected in accordance with the stringent requirements of this standard.

Additional Information

Performance and monitoring	Protech and our hosting infrastructure partners monitor both the application and the infrastructure to ensure availability targets are met or exceeded. Any changes to the application or hosting environment are subjected to testing protocols to ensure regression issues are not introduced. Our hosting and infrastructure partners are accredited to Information Security Management Standard ISO 27001.
User Interface	Web browser. Smart client ('Click Once') or application virtualisation using a variety of methods (required for ProConnect Enterprise Edition only).
Data Assurance	Protech works in partnership with security accredited infrastructure as a Service (IaaS) providers. Protech is responsible for the deployment and support of the ProConnect application suite. If the service is, at the customer's request, to be accessed also or via the Internet rather than a private connection then that level will be at IL0. Connection to the PSN is provided in our hosting options and can be provided by the customer e.g. connectivity to N3, CJX or PNN in our Commercial Cloud environment.
On-boarding / off-boarding services	The ProConnect suite of specialist, modular applications employ the following On-boarding service options, which include: Associated setup/configuration activities for the entry level minimum of 20 user licenses in accordance with customer requirements. Data migration support services are optional and will be charged based on the rates in the SFIA rate table. For further information on data migration, see below. Off-Boarding services options include: Extraction of consumer generated data which will be charged using the rates specified in the SFIA rate table. On termination of the service customer data will be removed from the system.
Data extraction, migration and deletion	The data migration service is available for the migration of data from the customer's current application. The goal is to ensure data integrity is preserved, constraints are not violated, there is minimal operational impact and the data is available as required via prioritisation. Migration activities include data mapping, proof of concept, trial migration, final live migration and result verification. In respect of data migration from legacy applications, this service will be at an additional charge and will be determined on a case to case basis depending on the volume, complexity, source system of the data to be migrated. The service will be priced using the rates in the SFIA rate table.

<table>
<tr><td>Data import / export features</td><td>Pre-defined datasets can be readily imported into ProConnect CRM to create new records. All record sets created from system generated reports or data profiles can be exported to standard formats such as Excel, CSV.</td></tr>
<tr><td>Estimated Timeframe</td><td>A sandbox service can be provisioned within 6 weeks, subject to an agreed set of functional and non-functional requirements. The production service on-boarding timelines will be agreed with the customer on a case-by-case basis based on individual testing requirements and migration priorities</td></tr>
<tr><td>Data backup, disaster recovery</td><td>Backup and disaster recovery services are provided by Protech's infrastructure partners and are designed and deployed in accordance with client requirements, subject to the procurement of an appropriate Service Management wrapper.</td></tr>
<tr><td>Technical requirements</td><td>As is the case for all Cloud based SaaS applications, access to appropriately specified infrastructure will ensure optimal use of the modules. The nature of the SaaS product(s) purchased may necessitate additional hardware and / or software (e.g. operating systems, middleware). Access to LAN's, WAN's and broadband access to the internet are also features of the deployment models offered.</td></tr>
<tr><td>Helpdesk support</td><td>Tier 2 Support is provided from the Support Desk and standard features include:
Fast response support via remote diagnostic links or agreed access method(s).
Interactive on-line support via GotoMeeting (Web Application).
On line reporting and tracking of all support calls via ProAssist™ (Protech's issue logging / tracking portal).
On line guidance instructions via ProAssist.
Quarterly support review meetings.
The table below provides the choice of support options.

Table 1 – Help Desk Support Levels

<table><tr><th>Support Level</th><th>Cover period</th></tr><tr><td>Standard</td><td>Monday - Friday, 0900 -1730 (excluding Public & Bank Holidays</td></tr><tr><td>Advanced</td><td>Monday - Sunday, 0800 -1800</td></tr><tr><td>Enhanced</td><td>24 hours/day, 365 days a year</td></tr></table>
The service levels are to provide a workaround within 4 hours for a Critical fault, 8 hours for a Material fault and the next major application release for a Cosmetic fault.</td></tr>
<tr><td>Data processing and storage locations</td><td>The ProConnect CRM SaaS data is stored on storage devices hosted by our hosting infrastructure partners in their UK data centres. Storage requirements are determined at the start of the contract and are dynamically scalable to meet customer need.</td></tr>
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Deployment models	Protech and our infrastructure hosting partners provide a range of deployment options including: Public Cloud Private Cloud Hybrid Cloud We can deploy the ProConnect CRM onto the customer's own hardware infrastructure / customer owned datacentre where required. In all deployment models, Protech are responsible for the deployment and support of the application suite (tier 2 only).
Financial recompense for not meeting service levels	Protech will discuss a financial recompense model should there be a requirement. At present all prices exclude any form of financial recompense or service credits.
Service constraints	These are variable and are in accordance with the service subscription being purchased and can be tailored according to customer need.
Customer responsibilities	The customer responsibilities include: Provision and management of tier 1 support services. Provide the device and network connectivity to the servers or the hosted infrastructure. Data ownership. Ensure that user logins and passwords are kept secure. Ensure that users are appropriately trained. Secure network access. Ensure that only appropriate data is stored and processed within the environment. Customer network connectivity to the data centre. Middleware components – SQL, Citrix, MS Office, MS Exchange.
Product development roadmap	Functional developments to the ProConnect CRM SaaS Platform are added to the product roadmap on a regular basis and in consultation with the customer / user base through the user group. There are a minimum of 3 software maintenance releases per annum, of which at least two will provide new product features which can be adopted by the customer as appropriate
Service Transition	Additional services available during the service transition include: Project management and support. Change management and support. Transition planning and support. Training for: End users on application functionalities; Operations staff on operating the application; Service desk (triage) staff on supporting the end users. Prepare local champions for the new application. Protech has listed an entry under Lot4 of Digital Marketplace for the implementation services associated with the implementation, configuration and management of the ProConnect SaaS application suite.
Pricing	Please see separate Pricing document.

3rd party software integration features	**Fetchify** provides identify management, address validation and address populate features, online bank account and credit card validation. **Dotdigital** provides enhanced digital marketing capability Clear Direct Debit provides **Clear Accept** provides online credit card payment processing **Clear Direct Debit** provides BACs accredited training, BACS consultancy and a BACS approved Bureau *Please note that the ProConnect CRM does not require any of the above products to deliver the features described in this service definition. These are additional features that may be of interest to the customer and are the subject of separate, additional license fees.* LiveOps delivers real-time Computer Telephony Integration for Inbound CLI / screen pop capability and Co-ordinated Voice Data Transfer. LiveOps also supports live web chat from the front-end CMS.
Pricing (Hosting)	Protech and our infrastructure and hosting partners offer a range of options. Pricing for each of these is available separately under the –Digital Marketplace listing for the service. There are 2 licensing models for ProConnect CRM – 1) traditional 'software as a service' where license fees are included in the monthly charge, or 2) perpetual site license where the license fees are included in the monthly charge and license charges cease to be applicable after the initial 2-year contract period for a maximum of 5 years (minimum 200 users). The cost of configuration and / or customisation will be per the SFIA rate card. Pricing differs according to the hosting option selected.
Minimum contract period	ProConnect requires a minimum 12-month contract with a minimum commitment level of 200 ProConnect Enterprise users for a perpetual site license and 20 users for the standard license. Each ProConnect Enterprise license provides 1000 web users (member access) for the standard SaaS model.
Termination	Subscription to the service will normally be for a minimum period of 24 months. 12-month contracts are offered where required. After this initial contract period the customer may continue to use the service subject to a rolling 3 month notice period. Further discounts are available for contract extensions. There are significant cost reductions for procurement of the perpetual site license, for which software license costs end after 24 months, however the client can continue to use the software for up to a further 36 months. Platform infrastructure and maintenance costs apply for the entire period of the contract (including any extension period).
Trial service	Protech are pleased to offer trials of the ProConnect CRM SaaS Platform. Protech will work with customers who wish to proceed with a trial to define the Critical Success Factors (CSFs) and requirements. This will ensure that both Protech and customer are optimally placed to benefit from the trial

Ordering and invoicing	Protech offers a range of payment options based on the commercial agreement for any given service. We can also offer incentives for longer contract periods (minimum 24 months) and for purchase of a perpetual site license.
Additional information	Additional setup and configuration services will be required per the SFIA rate card. Further discounts can be offered to customers utilising multiple ProConnect CRM Specialist modules and / or for contract extension. Licensing models are for traditional 'Software as a Service' or based on perpetual site license (minimum of 200 users).