

HUB 02

Delivery Management

Run delivery end to end. Case management, quality reviews, sampling, training and audit. Plus add-on modules for Marker and Audit Centre.

FROM CHAOS TO CONFIDENCE

The problems with running an apprenticeship provider: **solved.**

Providers spend too much time chasing data from systems that weren't built to talk to each other. AiVII fixes that. Real-time visibility, encoded sector knowledge and AI-assisted workflows: one platform that does the thinking so leaders can focus on improvement.

— THE PROBLEM TODAY

Data scattered across spreadsheets

Teams pull data from your MIS, BI tools and homemade trackers. By the time the report's ready, the situation has changed.

At-risk learners surface too late

Withdrawals show up in monthly reports after they've happened. Coaches have no early signal.

Ofsted prep is reactive

When the call comes, leaders scramble to assemble evidence, sample learners and rehearse deep dives.

Funding leaks invisible until audit

Past-PED, withdrawals, gateway delays and OPP recovery all happen in spreadsheets: if they happen at all.

— THE AIVII SOLUTION

One platform, real-time

Connect your MIS once. Every dashboard, tracker and report reads the same live data. No exports, no end-of-month delay.

Early-warning indicators, encoded

AiVII Risk Rating surfaces learners drifting off track weeks before they'd trigger your LMS alerts. Daily Operations shows what changed overnight.

Always Ofsted-ready

Self-Evaluation, evidence library, deep dive prep and AI Ofsted Companion mean inspection readiness is a state, not a sprint.

Funding recovery, in formulas

ROI tracking covers Past PED, At-Risk OPPs Recovered, Gateway Timely % and Manual Data Work: with the calculations that map to ESFA recoveries.

PLATFORM AT A GLANCE

Three menus. One coherent platform.

AiVII organises everything around three top-level menus, with role-aware filtering so each user only sees what's relevant. Standard roles cover Senior Leader, Operations Leader, Quality Leader, Operations Manager, Quality Manager, Internal Quality Assurer and Skills Coach.

01

Reporting & Analytics

7 sub-menus · ~30 pages

Provider Performance

Performance Snapshot · QAR · Accountability Framework

Operations

Daily Operations · Skills Coach Dashboard · Coach Performance & Capacity · Trainer Dashboard · Learner Outlook

Quality & Curriculum

QA · EPA · EDI Achievers · Observations & Sampling Reports · Activity & Programme · Lifecycle Analytics

Compliance

Compliance & ILR Suite

Sales

Sales Analytics · Employer Intelligence · Applicant Overview

Finance

Funding Overview · Funding Forecasting · Learner Numbers

Learner & Employer

Learner Detail (360) · Employer Detail · Performance · Location

02

Delivery Management

4 sub-menus · ~20 pages

Operations

Operations Trackers Suite (Gateways · Withdrawals & BIL · On Break · FS Support · ALS · In EPA) · Training Module

Quality

Quality Reviews Suite (Observations · Sampling · Standardisation · IQA Configuration · Feedback)

Compliance

Audit Centre (Funding Audit · PDSAT · FIS): **add-on**

Sales

Pipeline · Targets · Salesperson Allocations

03

Governance & Regulatory

3 sub-menus · ~15 pages

Ofsted

Ofsted Readiness · Self Evaluation Form · Learning Walks · Case Sampling · Evidence Library · Scenario Practice

Safeguarding

Safeguarding Hub · Log · Risk Assessments · Staff Register · Risk Register

Governance

Governance Dashboard · DfE Compliance · Quality Improvement Plan · Board Management · Funding Scrutiny · Subcontracting · Risk Mgmt · Financial Submissions · Policy Repository

— SECTION 02

Delivery Management

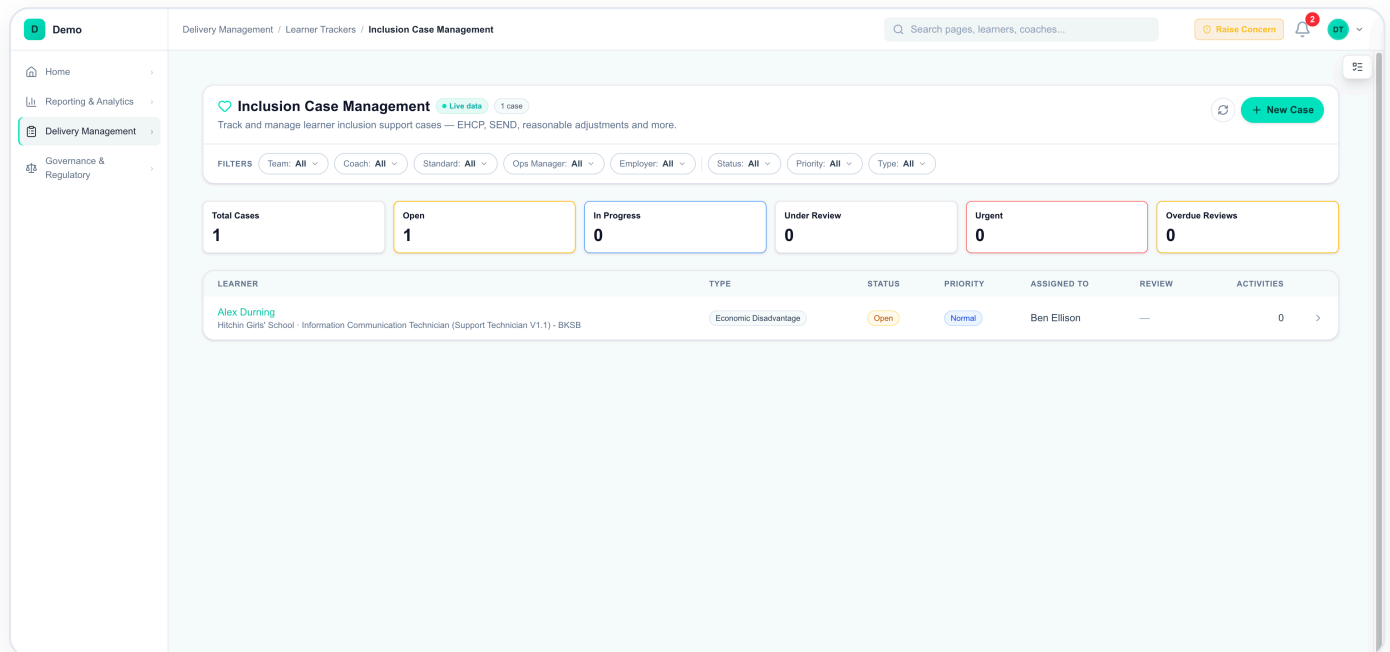
Operational case management, training delivery, quality assurance: and an Audit Centre add-on for end-to-end funding rule compliance.

- Operations Trackers Suite CONTROL
- Training Module CONTROL
- Quality Reviews Suite CONTROL
- Audit Centre. Funding Audit ADD-ON
- PDSAT & FIS ADD-ON
- DM Sales CONTROL

OPERATIONS TRACKERS SUITE · HEADLINER

Seven case-management trackers, one workflow.

The operational case-management hub. Seven trackers cover every active learner status that needs intervention: Inclusion, On Break, Functional Skills Support, ALS Support, In EPA, Gateway & Completions, Withdrawals & BIL. Auto-sync from your MIS where possible; manual override always available. Every row drills into a per-case detail page with status workflow, activities, follow-ups and document evidence.



01 WHAT IT ANSWERS

- Which learners need active case management this week?
- Where are we behind on follow-ups, reviews, IQA assignments?
- Who's in EPA right now and what's their risk?
- Which BIL learners need return action; what's our payback exposure?
- Which gateway / completion learners are predicted for this month?

03 PER-CASE WORKFLOW

- Click a learner row → per-case detail at [id]
- Status workflow (Open → In Progress → Under Review → Resolved → Closed)
- **Activities log** per case: date-stamped notes and follow-ups
- **Bulk copy** on Gateway / Withdrawals to next month
- IQA assignment + predicted dates editable inline

02 TRACKERS IN THE SUITE

- **Inclusion Case Management** EHCP / SEND / Mental Health / etc, 6 KPIs
- **Functional Skills Support** English / Maths / ICT, level badges
- **In EPA** 7 KPIs incl. days-in-EPA colour coding
- **Withdrawals & BIL** payback estimates, expected returns

7 TRACKERS

- **On Break** auto-synced BIL learners w/ tracking flag
- **ALS Support** gap badges (≥6w / 4-5w), funding claim flag
- **Gateway & Completions** month-by-month, predicted dates editable

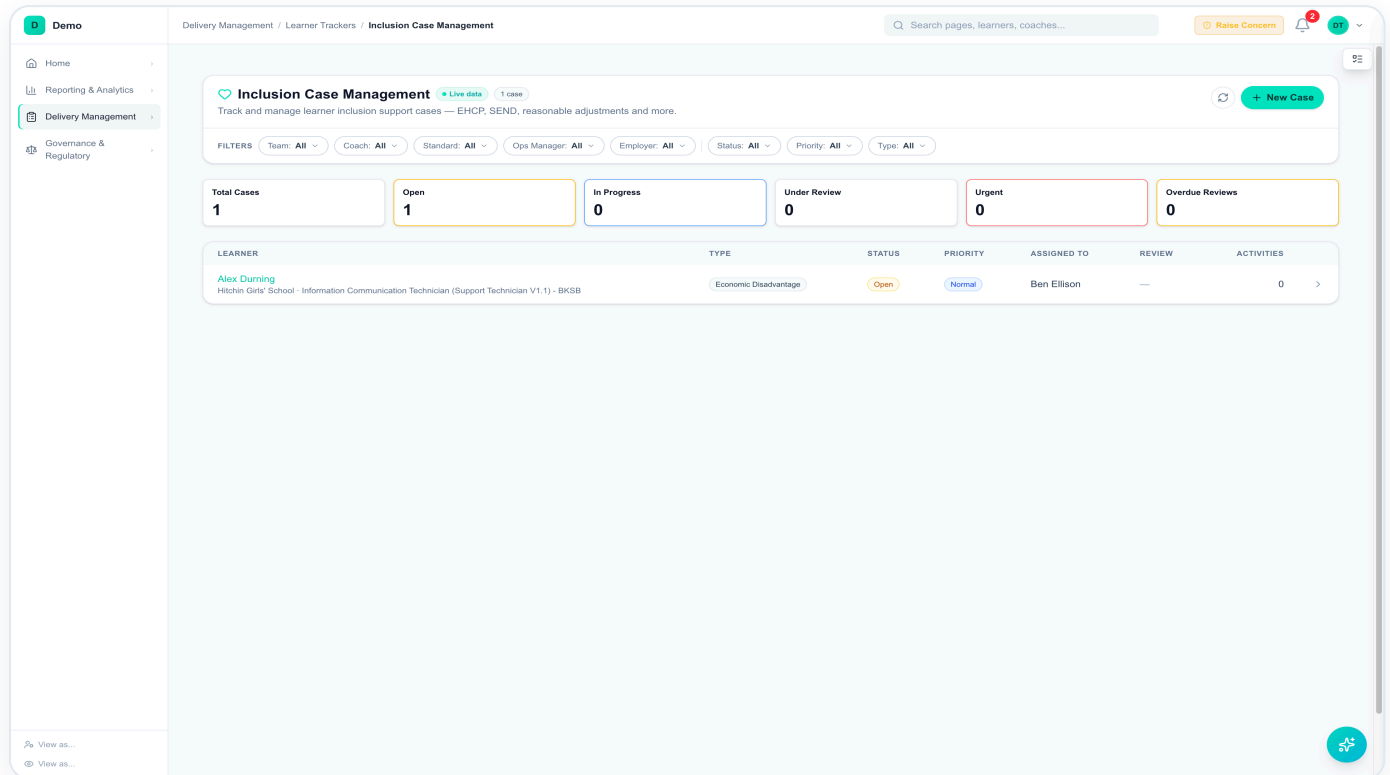
04 FILTERS & AUTO-SYNC

- **Shared TrackerHeaderFilters:** Team / Coach / Standard / Ops Manager / Hybrid Year
- **Per-tracker chip filters:** Status / Priority / Type / Risk
- **Auto-sync from MIS** on Inclusion, On Break, FS Support, ALS, In EPA
- **Live data sync** on Gateway / Withdrawals with manual override fields

OPERATIONS TRACKERS SUITE · IN PRACTICE

Seven trackers. One muscle memory.

How case managers, operations leaders and IQAs move learners through the operational pipeline without spreadsheets, exports or manual reconciliation.



KPI cards (per tracker)

Total / Open / In Progress / Under Review / Urgent / Overdue: instant case status.

Status filter

Filter chip row. Status / Priority / Type / Risk per tracker.

Per-case row

Click a learner row → per-case detail with activities, follow-ups, evidence.

New Case + Live data

Manual override always available even when MIS auto-creates cases.

INCLUSION COORDINATOR *Weekly review*

Log new cases. Mark resolved. Ready for the next safeguarding meeting.

Open Inclusion tracker. **6 KPI cards** show distribution. New ALS case from MIS: auto-created with badge. Click in, log initial assessment, set priority, assign to a coach. Two SEND cases moved to Resolved status: archive notes captured. **15 minutes**, full case management for the week.

OPERATIONS MANAGER *Gateway month*

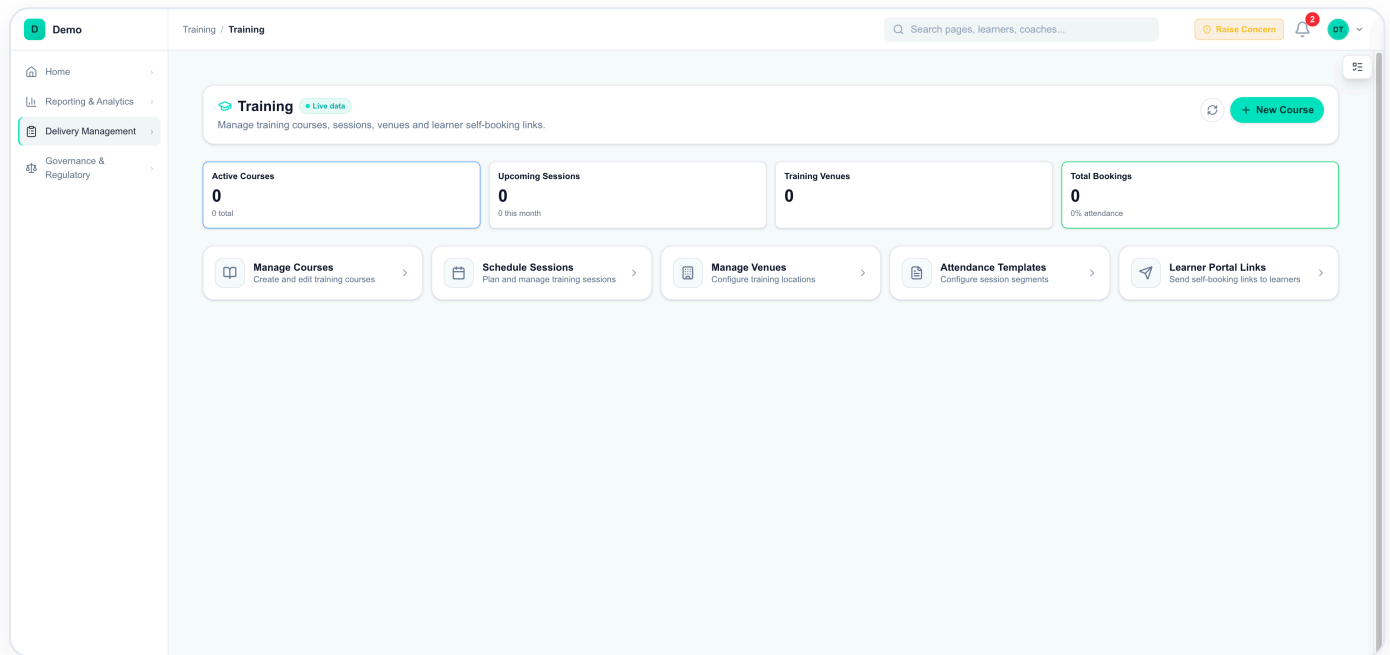
Predicted dates set. Bulk copy. Audit-ready.

Open Gateway & Completions tracker. Filter by current month. **Predicted Gateway Date** editable per learner: update based on coach intel. **Will Enter This Month** dropdown set per row. **Bulk copy** to next month for in-flight learners. ESFA evidence: every gateway prediction documented with the coach who made the call.

TRAINING MODULE · HEADLINER

Course catalogue, sessions, attendance. In one module.

The Training Module is the operational engine for off-the-job training delivery. **Courses** for the catalogue (KSB-linked, prerequisite-aware). **Sessions** for instances of those courses with attendance registers. **Venues** for physical and virtual locations. **Templates** for reusable lesson blocks. **Learner Links** map learners to courses. **Feedback** + reports collect post-session sentiment. AI Training Matrix briefings (ControlAI) summarise each completed session for the trainer.



01 WHAT IT ANSWERS

- What courses do we offer, and what KSBs do they cover?
- What sessions are scheduled, who's booked, who attended?
- How do learners rate each course?
- Which venues are over / under booked?
- Are reusable lesson templates being kept fresh?

02 SUB-FEATURES

- **Courses** catalogue, KSB linking, prerequisites, status
- **Attendance Register** per-learner confirmation + completion + notes
- **Templates** reusable segment / lesson blocks
- **Feedback** post-session collection
- **AI Training Matrix** per-session briefing (ControlAI)

6 FEATURES + AI

- **Sessions** course instances + attendance per session
- **Venues** physical + virtual meeting templates
- **Learner Links** learner-to-course mapping with progress
- **Feedback Reports** analytics + sentiment summaries
- **Pairs with Trainer Dashboard** end-to-end session lifecycle

03 AI FEATURES (CONTROLAI)

- **AI Training Matrix briefings:** auto-generated post-session summary per trainer
- Captures key learning outcomes, attendance patterns, feedback themes
- Surfaced as Sparkles indicator on completed sessions in Trainer Dashboard

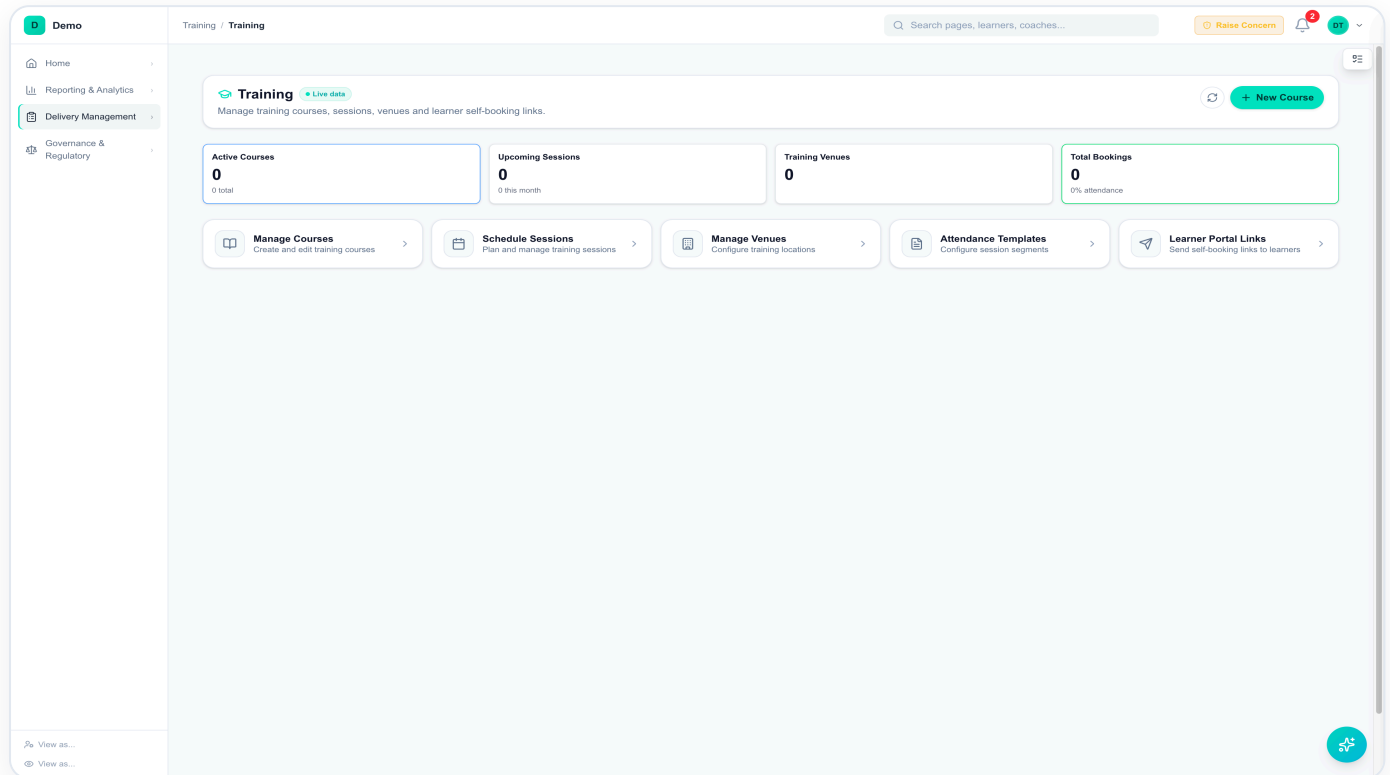
04 WORKFLOW

- **Create / Edit / Copy / Archive** on Courses with KSB linking
- **Mark attendance, record completion** on the session register
- **Self-service or admin-driven** learner enrolment via Learner Links
- **Standard + Programme filters** on Courses + Sessions for cohort scoping

TRAINING MODULE · IN PRACTICE

From course catalogue to AI Matrix briefing.

How trainers and operations use Training Module across the session lifecycle: build the catalogue, schedule sessions, mark attendance, capture feedback, review the AI-generated training matrix.



KPI overview

Active Courses / Upcoming Sessions / Training Venues / Total Bookings: the module at a glance.

Manage Courses

Course catalogue with KSB linking, prerequisites, status, capacity.

Schedule Sessions

Course instances with attendance register and learner assignments.

Learner Portal Links

Self-service enrolment links per cohort: sent direct to learners.

TRAINER *Post-session, 10 min*

Attendance, feedback, AI matrix: in one workflow.

Open the session. Mark **attendance register**: 14 of 16 confirmed. Capture session notes. Trigger feedback campaign. Review the **AI Training Matrix**: AI summary highlights the engagement-low moment in the second hour, and which learners may need follow-up. **Walk into next week prepared.**

QUALITY MANAGER *Standardisation prep*

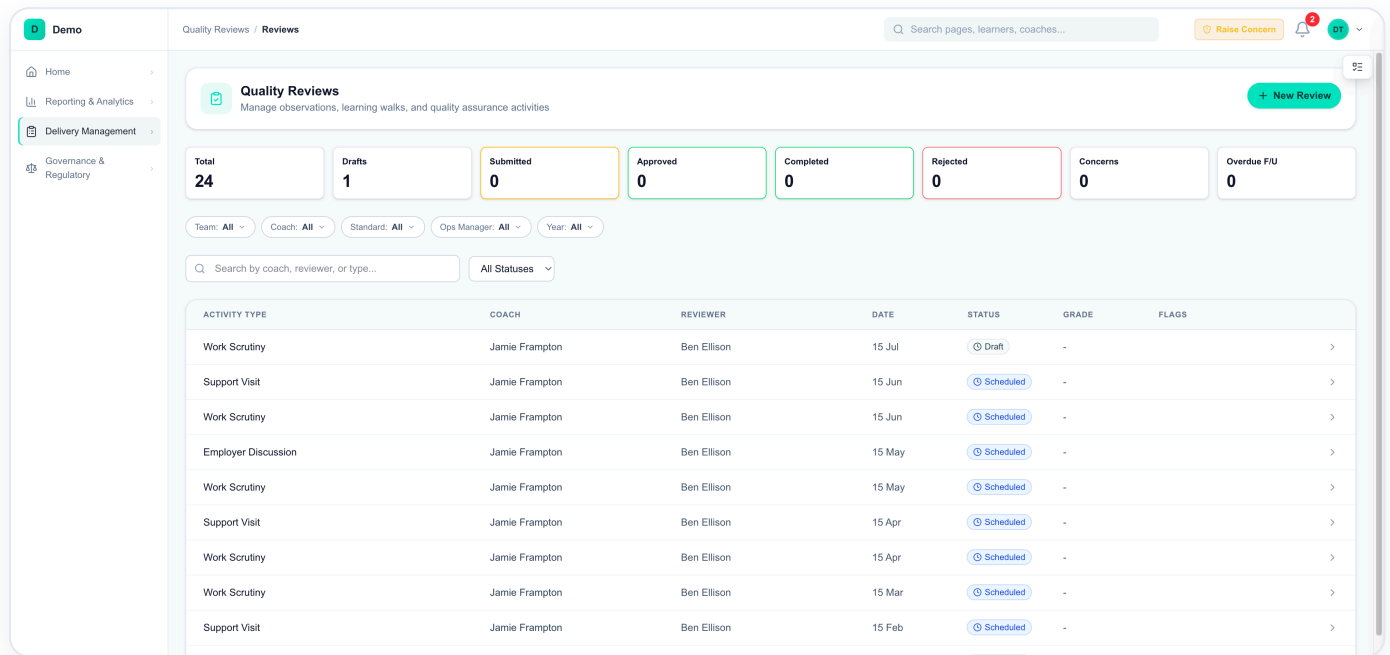
Identify cross-coach delivery patterns from feedback.

Open Feedback Reports. Filter to last quarter. **Sessions by Course** chart shows learner satisfaction varies by 15pp on the same course across two trainers. Click into the lower-rated trainer's sessions: per-question feedback flags weaker pacing. **Concrete agenda** for the next standardisation event.

QUALITY REVIEWS MODULE · HEADLINER

Observations, IQA, feedback. One module, eight angles.

The Quality Reviews module covers nine activity types. Observation, Learning Walk, Progress Review, Work Scrutiny, Learner Discussion, Employer Discussion, Support Visit, Shadowing, New Coach Support: with an end-to-end workflow from planning through draft / submitted / approved / completed / acknowledged. IQA Configuration sets rules and assignment logic. Feedback collects structured input from learners via campaigns and quick-link surveys.



01 WHAT IT ANSWERS

- What observations and reviews are scheduled, in flight, completed?
- Where are concerns being flagged and how are follow-ups tracked?
- How is each coach being supported through the QA cycle?
- Which programmes need more QA attention?
- What does the grading distribution look like across the team?

03 WORKFLOW FEATURES

- Drag-and-drop **form template builder** (custom fields per activity type)
- **Concern flag** + follow-up date enforced on review submission
- Filter chip rows for coach scoping; bulk actions on activities
- Per-coach detail page rolls up all QA activities for that coach
- Send Invitations flow for safeguarding token-based feedback collection

02 MODULE STRUCTURE

- **Plan** scheduled observation calendar + coaching plan
- **Activities** log of every QA activity, bulk actions
- **Reports** trends, grade distribution, compliance
- **Templates** customisable forms per Standard
- **9 activity types** Observation / Learning Walk / Work Scrutiny / etc
- **IQA Configuration** criteria, rubrics, escalation triggers

8 SUB-FEATURES

- **Coach** coach-centric view, performance + cycles
- **Programmes** scheduling by apprenticeship programme
- **Caseload** QA workload per assessor, capacity planning
- **Settings** activity types, grading scales, assignment rules
- **7-state status workflow** Draft → Scheduled → Submitted → Approved → Completed → Acknowledged → Rejected
- **Feedback** campaigns + quick links + settings

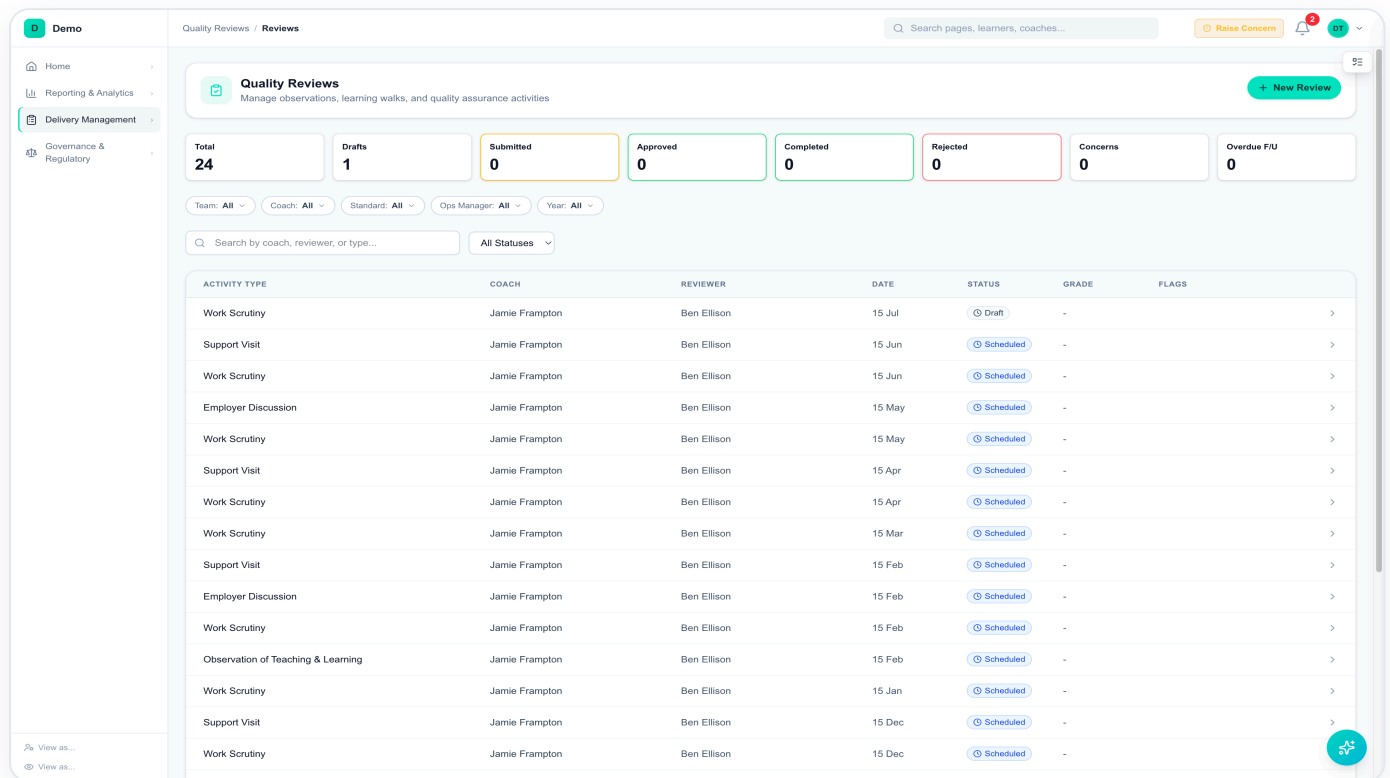
04 FILTERS & SCOPING

- **TrackerHeaderFilters:** Team / Coach / Standard / Ops Manager / Hybrid Year
- **Status filter** for the review state machine
- **Activity Type filter** for the 9 types
- Per-sub-feature filters tuned to that view

QUALITY REVIEWS MODULE · IN PRACTICE

Observation to evidence pack. One workflow.

How IQAs and Quality Managers run the QA cycle from plan through observation, follow-up and audit pack: with a 7-state status workflow and 9 distinct activity types.



8 KPI cards

Total / Drafts / Submitted / Approved / Completed / Rejected / Concerns / Overdue F/U.

New Review

9 activity types: Observation / Learning Walk / Work Scrutiny / Conversations / Support Visit / etc.

Status filter

Search + Status filter (All Statuses / Draft / Scheduled / Submitted / Approved / Completed / Rejected).

Activity rows

Per-activity status badges: 7-state workflow visible at a glance.

IQA *Weekly observation cycle*

Pick coach. Observe. Flag. Move on.

Open the Plan view. **Coach-centric scheduling** shows the next 5 coaches due for observation. Pick the first: load the activity, complete the structured form (Standard-specific template), capture observations + grade. Tap **Concern Flag**: required follow-up date enforced. Submit, system routes to Quality Manager for approval.

QUALITY MANAGER *Audit prep*

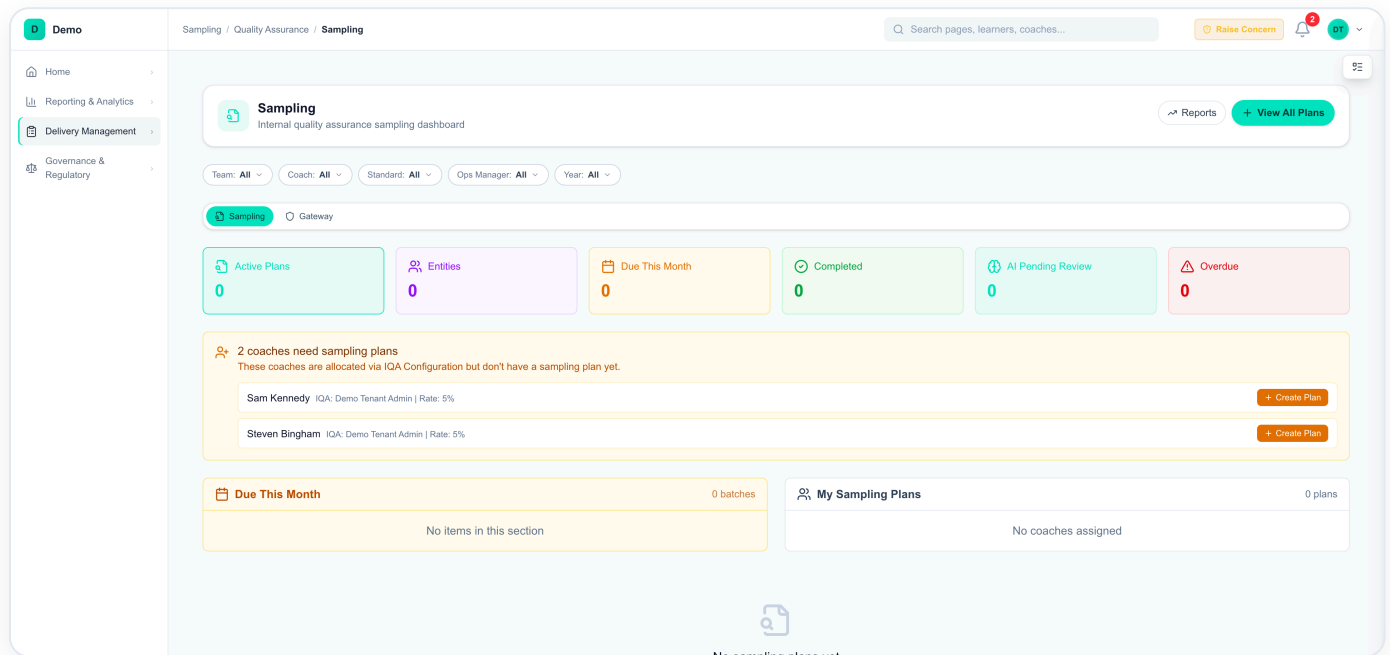
Reports view → evidence pack.

Open Reports. **Grading distribution by programme**: one programme has 30% Requires Improvement, twice the next worst. Click into Activities log filtered to that programme: 14 observations to evidence the pattern. Print to PDF for the Self Evaluation Form. Concern flags + follow-ups all visible: **audit pack assembled in 20 minutes.**

SAMPLING MODULE · HEADLINER

Audit-ready sampling. Planned, assigned, reported.

The Sampling module covers the full IQA sampling cycle. **Plans** define the audit batch (random / risk-based / stratified). **Items** are the individual pieces of work assigned for audit. **Assignments** route items to QA staff. **Reports** roll up audit outcomes into compliance, quality and rework analytics. **Gateway sampling** enforces a quality check before a learner enters EPA. With ControlAI, AI Sampling Suggestions auto-flag high-risk learners for inclusion.



01 WHAT IT ANSWERS

- What's our sampling plan this cycle: what work, how much, by whom?
- Which items are in audit, complete, or pending?
- Who's working on what; what's the turnaround time?
- What's our pass rate by Standard, and what common issues recur?
- Which learners need a gateway sample before EPA?

03 AI FEATURES (CONTROLAI)

- **AI Sampling Suggestions:** auto-flag high-risk learners for inclusion in the next plan
- Risk weighting incorporates withdrawal risk, prior audit findings, learner profile
- Suggestions reviewable before commit: audit always remains human-led

02 MODULE STRUCTURE

- **Sampling Plans** batch definition: method, sample size, period
- **Sampling Items** per-item: learner, work type, sampling status
- **Sampling Reports** pass rate by Standard, common issues, rework
- **3 sampling methods** Random / Risk-based / Stratified
- **Quality grading** audit outcome captured per item

04 CHILDREN + GATEWAY

- **Plan detail / batches** drill into per-plan items
- **Sampling Assignments** route items to QA staff with workload tracking
- **Gateway sampling** mandatory quality check pre-EPA
- **3 sampling statuses** Pending / In Audit / Complete
- **Activity types** Assignment / Test / Portfolio submission

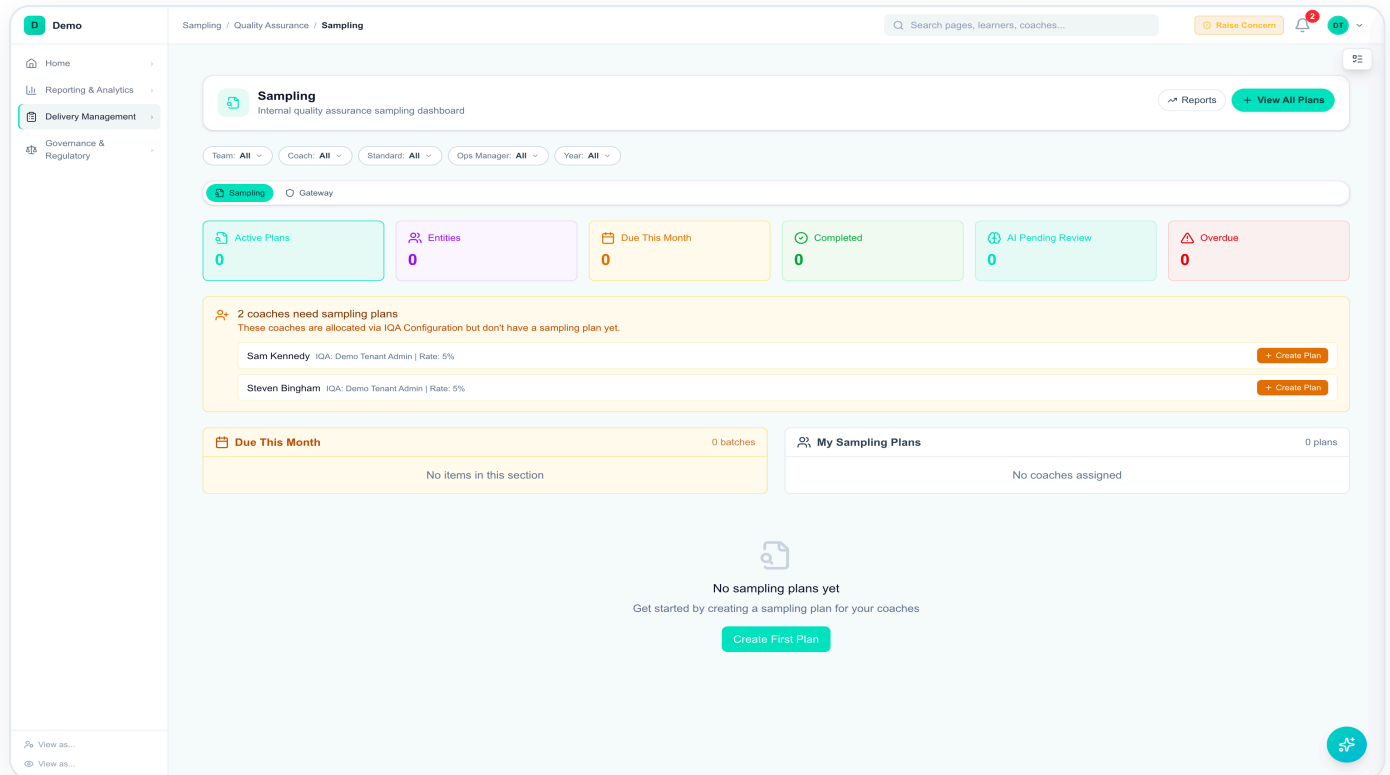
04 FILTERS & WORKFLOW

- **Per-plan workflow:** Draft → Active → Completed
- **Gateway sampling** integrates directly with EPA tracker
- Drill from Reports into individual rework items
- QA staff capacity surfaced in Assignments view

SAMPLING MODULE · IN PRACTICE

Audit-ready sampling. AI-suggested.

How quality leads run the sampling cycle from plan to gateway. AI Sampling Suggestions (ControlAI) flag high-risk learners; Gateway sampling enforces a quality check before EPA progression.



View All Plans

Drill into the full plan list with method (Random / Risk-based / Stratified), batch view, items.

AI Pending Review

ControlAI. AI Sampling Suggestions queued for human review before commit.

Sampling / Gateway tabs

Sampling cycle vs Gateway sampling: mandatory pre-EPA quality check.

Coaches needing plans

Auto-detection of coaches allocated via IQA Configuration but missing a sampling plan.

QUALITY LEAD *Monthly cycle*

AI Suggestions. Plan. Route to assessors.

Open Sampling Plans. Click **New Plan**: pick risk-based method. **AI Suggestions** panel flags 12 high-risk learners (withdrawal risk + prior audit findings + recent overdue activity). Review each, accept 10, swap 2 for stratified coverage. Assignments routed to QA staff. **Plan ready in 15 minutes** instead of an afternoon.

QUALITY DIRECTOR *EPA gateway*

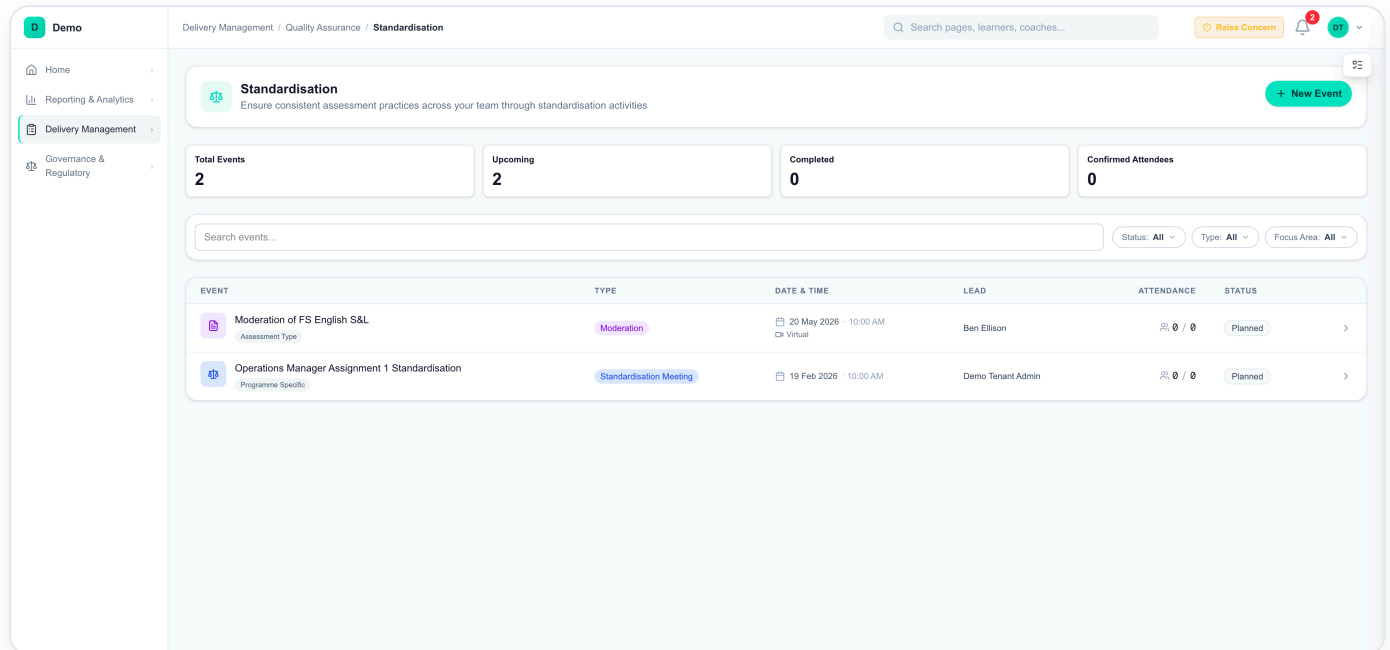
Gateway sampling protects the achievement rate.

A learner reaches gateway. **Gateway sampling** enforces a final quality check. Sample assigned to a senior IQA. Quality grade flagged below threshold: learner blocked from EPA progression until rework complete. **Achievement rate protected**; provider not exposed to a failed EPA that drops QAR.

STANDARDISATION

Standardisation events. Planned, attended, evidenced.

Standardisation is the dedicated tracker for moderation, cross-marking, double-marking and benchmarking events. Plan an event with type, focus area, location and lead. Send invitations and track confirmations. Upload minutes and assign follow-up actions after the event. Used by Quality Leaders to evidence calibration across the team for Ofsted and ESFA audit.



01 WHAT IT ANSWERS

- When is our next standardisation event, and who's attending?
- Where are we calibrating across the team?
- What follow-up actions came out of the last meeting?
- Have we got evidence for Ofsted on cross-marking events?
- Who led which session, and on what focus area?

02 KEY METRICS SHOWN

- **Total Events** all events in scope
- **Completed** historical record
- **5 event types** Standardisation / Moderation / Cross Marking / Double Marking / Benchmarking
- **6 status states** Planned / Invitations Sent / Confirmed / In Progress / Completed / Cancelled

4 KPIS + TABLE

- **Upcoming** forward-looking schedule
- **Confirmed Attendees** total across all events
- **4 focus areas** Funding Reqs / Ofsted / Programme-specific / Assessment
- **Per-event detail** minutes upload, attendance, follow-ups

03 WORKFLOW

- **Schedule** a new event via modal
- **Invite + track confirmations** with invitations sent / confirmed counts
- **Upload minutes** on completion + record attendance
- **Assign follow-up actions** per event for accountability

04 FILTERS & SCOPING

- **Status · Event Type · Focus Area** dropdowns
- **Search** by title / description / focus detail
- Physical or virtual location with link captured per event
- Pairs with Quality Reviews module for calibration evidence trail

AUDIT · HEADLINER (WITHIN FUNDING AUDIT MODULE)

Risk-based funding rule audit. Before ESFA does it for you.

The Audit hero of the Funding Audit Module. A risk-based engine that scores every learner against ESFA funding rules and surfaces over-claims, under-claims, ineligible activity and missing evidence. Audit credits and streams let you scope an audit run; the Trends view shows historical compliance and finding patterns. Used by finance and compliance leaders to self-audit before external assurance.

Audit (Funding Audit Module). Add-on module

Add-on module: not active on the demo tenant, so a screenshot isn't available here. Live walk-through available on request once the Funding Audit Module is enabled on a tenant.

SCREENSHOT TO BE CAPTURED FROM A TENANT WITH THE ADD-ON ENABLED

01 WHAT IT ANSWERS

- Where are we over-claiming or under-claiming funding?
- Which learners have ineligible activities logged or missing evidence?
- What's our funding compliance trend over time?
- How many audit credits do we have, and which expire when?
- What does ESFA see if they audit us tomorrow?

02 KEY METRICS SHOWN

- **Total Audited / Passed / Failed** 3 KPIs at the top
- **Average Risk Score** 0-100 composite
- **Streams** audit scopes (by Standard, cohort, funding type)
- **Results view** audit findings with type / amount impact
- **Settings view** rules, sampling strategy, escalation thresholds

5 SUB-VIEWS

- **Warnings / Needs AI Review** 2 attention indicators
- **Credits** available + expiring within 30 days
- **Learners view** master list with funding status + audit history
- **Trends view** monthly pass rate + finding type distribution
- **Finding types** Over-claimed / Under-claimed / Ineligible / Missing Evidence

03 DRILL-THROUGHS

- Click a learner row → per-learner audit detail with finding history
- Click a finding type → learners with that finding
- Click an audit result → remediation tracking
- Click a stream → cohort-scoped audit run detail

04 ADD-ON POSITIONING

- The Funding Audit Module is purchased separately from Core / Clarity / Control / ControlAI
- Risk-based engine + audit credits scale to your volume
- Pairs with Compliance & ILR (in R&A) for the full audit story
- Recommended for any provider running material subcontract or grant-funded provision

AUDIT (FUNDING AUDIT MODULE) · IN PRACTICE

Audit before they audit you.

How finance and compliance leaders use the Audit hero of the Funding Audit Module to self-audit before ESFA does: risk-based scoring, finding triage, trend analysis.

Audit (Funding Audit Module). Add-on module

Add-on module: not active on the demo tenant, so the screenshot is unavailable here. Live walk-through available on request once the Funding Audit Module is enabled. See the Round 1 page (slide 34) for the feature inventory.

Risk-based scoring

Every learner scored 0–100 against ESFA funding rules: high-risk learners surface first.

4 finding types

Over-claimed / Under-claimed / Ineligible activity / Missing evidence.

Trends view

Monthly pass rate + finding type distribution + funding impact over time.

Audit credits + streams

Scope an audit run by Standard / cohort / funding type with credit-based usage.

FINANCE DIRECTOR *Quarterly self-audit*

Find the leak before ESFA does.

Run an audit stream scoped to last quarter. **Risk distribution chart** shows 12 learners over 70/100 risk score. Click in: 8 over-claimed (incorrect activity logging), 4 missing evidence. Assign remediation owners. **Funding at Risk £** totalises the exposure if ESFA found these. Three weeks of preventative work avoids the recovery letter.

COMPLIANCE LEAD *ESFA visit week*

Trends view tells the story.

ESFA arrives. Open Trends view. **Pass rate** chart shows steady improvement: 78% → 85% → 92% across three quarters. **Finding type distribution** documents what you fixed. Pair with Compliance & ILR for the document trail. Walk into the audit with a year of self-audit evidence on the table.

PDSAT & FIS · HEADLINER (WITHIN FUNDING AUDIT MODULE)

Validate the data. Forecast the earnings.

PDSAT (Provider Data Self-Assessment Toolkit) runs your ILR through 50+ DfE funding rules and surfaces compliance breaks before audit. **FIS** (Funding Information System) projects per-learner earnings month by month using DfE formulas, covering on-programme, completion, balancing, incentives and learning support. Together they deliver data integrity and earnings visibility before R14.

PDSAT & FIS. Add-on module

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SCREENSHOT TO BE CAPTURED FROM A TENANT WITH THE ADD-ON ENABLED

01 WHAT IT ANSWERS

- Where are the compliance breaks in this month's ILR before submission?
- Which learners and categories are highest risk?
- What do we forecast each learner to earn this year?
- What's the projected total income across funding models?
- Are we at risk of over- or under-claiming on any learner?

02 KEY METRICS SHOWN

- **Total Learners Checked** PDSAT scope this run
- **Average Risk Score** cohort risk indicator
- **Issues by Category** 11 categories (data quality, eligibility, programme structure, financial accuracy, gateway/EPA, completion etc)
- **FIS Total Learners** in earnings scope
- **Total Projected Income** forecast year end
- **Average Earnings per Learner** benchmark per cohort

PDSAT + FIS

- **Pass / Fail / Warning** compliance outcomes
- **Risk Distribution** Critical / High / Medium / Low bands
- **Recent Batch Jobs** history of every PDSAT run
- **Total Earned To Date** aggregate actual earnings
- **By Funding Model** FM36 / 35 / 38 / 37 splits
- **Per-Learner Monthly Earnings** on-prog, completion, balancing, incentives, learning support

03 DRILL-THROUGHS

- Click a category → learners affected by that issue
- Click a risk band → learners in that band
- Click a learner → full FIS detail with monthly earnings + linked PDSAT risk score
- Click a job in history → what changed since last run

04 ADD-ON POSITIONING

- Both PDSAT and FIS sit inside the Funding Audit Module add-on
- Pair with Audit hero (slide 34) for the complete funding rule story
- Replaces manual data extracts and standalone funding calculators
- Audit-ready evidence and earnings packs export from each view

PDSAT & FIS · IN PRACTICE

Catch compliance breaks. See real earnings.

How finance and quality use PDSAT and FIS together. PDSAT for compliance issues across the ILR. FIS for the earnings forecast each learner is on track to deliver.

PDSAT & FIS. Add-on module

Add-on module: not active on the demo tenant, so the screenshot is unavailable here. Live walk-through available on request once the Funding Audit Module is enabled. See the Round 1 page (slide 35) for the feature inventory.

Compliance dashboard

Pass / Fail / Warning split with risk score distribution. Drill into any of the 11 categories to see learner-level evidence.

Batch job history

Every PDSAT run logged with date, scope and results. Audit trail built in. Schedule daily, weekly or monthly.

FIS earnings projections

Per learner, month by month, by payment type. Spot anomalies before claim submission.

PDSAT linked to FIS

PDSAT risk score sits next to earnings forecast on the FIS learner detail. Compliance and money in one view.

FINANCE DIRECTOR *R14 prep*

Run PDSAT, fix the breaks, then forecast.

Open PDSAT. Run a batch on the FM36 cohort. 8 fails, 23 warnings. Drill into **Eligibility**, 4 learners with date issues. Fix at source. Re-run, all green. Switch to FIS. **Total Projected Income** for the year. Drill into outliers, 2 learners forecasting near-zero earnings. Investigate before R14 submission.

QUALITY LEAD *Monthly compliance*

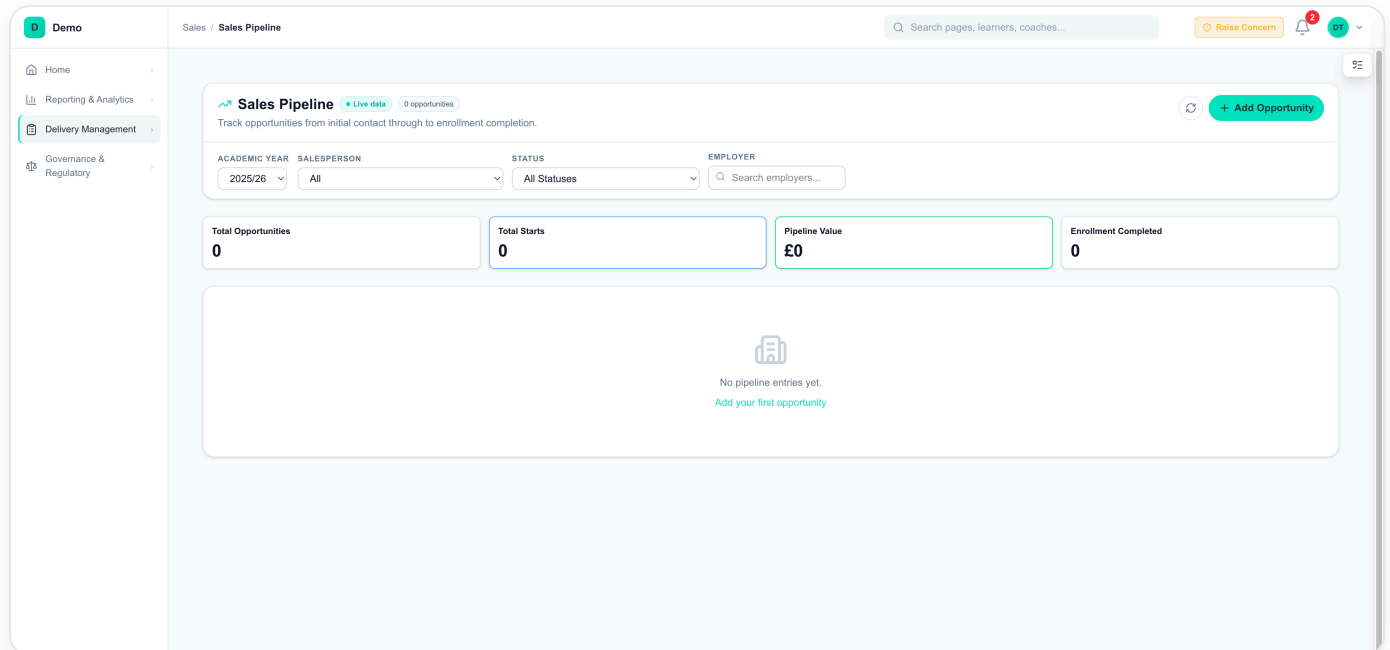
Schedule the scan, work the failures.

Open PDSAT. Schedule weekly auto-runs across all funding models. Critical and High failures land in the lead's inbox. Open the latest run. Click **Programme Structure**, 6 learners with hours misaligned. Hand to coach for evidence update. Status moves to Pass on next scheduled run. Audit trail captures the journey.

DM SALES

Pipeline. Targets. Salesperson allocations.

The operational sales hub. **Pipeline** for lead and opportunity management through the funnel (Prospect → Qualification → Proposal → Negotiation → Won / Lost). **Targets** for revenue and start targets per salesperson with quarterly breakdown and forecast vs actual. **Allocations** for the salesperson roster and territory / account assignments. Pairs with Reporting & Analytics Sales pages for the analytical view.



01 WHAT IT ANSWERS

- What's in our pipeline today, by stage and value?
- Which salesperson is hitting target; who's behind?
- How are territories and accounts allocated across the team?
- What's the conversion rate stage-to-stage?
- Where's the next month's expected close?

02 KEY METRICS SHOWN

- **Total Pipeline Value** currency, all open opportunities
- **Conversion Rate** stage-to-stage progression
- **Revenue Target** YTD + Q1-Q4 per salesperson
- **Forecasted Close** pipeline → close projection
- **Total Salespeople** team size + status
- **Active Accounts per Salesperson** caseload metric

3 SUB-FEATURES

- **Pipeline by Stage** funnel: Prospect → Won / Lost
- **Pipeline table** opportunity / employer / contact / stage / value / close date
- **YTD Achievement %** vs target
- **Pipeline vs Target Variance** positive / negative gap
- **Coverage by Region / Sector** territory map
- **Commission band** per-person commission tier

03 DRILL-THROUGHS

- Click an opportunity → detail at [id] with activity log + notes + documents
- Click a salesperson on Targets → monthly target breakdown
- Click a salesperson on Allocations → account list + activity log + commission history
- Click a stage segment → opportunities at that stage

04 FILTERS & PAIRING

- **Stage / Salesperson / Probability** filters on Pipeline
- **Quarterly view** toggle on Targets
- **Region / Sector / Status** filters on Allocations
- **Pairs with R&A Sales:** the analytical view of YoY trends and Employer Intelligence

WHAT'S INCLUDED WHERE

Four tiers, plus add-ons.

Every plan is priced per active learner with full MIS integration and onboarding included. Upgrade mid-contract, pro-rated. Add-ons sit outside the tier ladder: they layer onto whichever tier you're on.

FEATURE	CORE	CLARITY	CONTROL	CONTROLAI	ADD-ON
REPORTING ESSENTIALS					
Daily Briefing homepage (role-based)	✓	✓	✓	✓	–
QAR / Accountability Framework / Performance Snapshot	✓	✓	✓	✓	–
Daily Operations / Skills Coach Dashboard / Coach caseload	✓	✓	✓	✓	–
Sales Analytics / Compliance & ILR	✓	✓	✓	✓	–
Learner Detail (360) / Employer Detail	✓	✓	✓	✓	–
MIS integration / Email support	✓	✓	✓	✓	–
ANALYSIS TOOLS					
Analysis dashboards (comparisons, trends)	–	✓	✓	✓	–
Calendar with review tracking	–	✓	✓	✓	–
Learner Outcome Predictions	–	✓	✓	✓	–
Programme KSB gap analysis	–	✓	✓	✓	–
Quality / EPA / EDI / Lifecycle analytics	–	✓	✓	✓	–
Learner & Employer Performance / Location	–	✓	✓	✓	–
FULL PLATFORM MODULES					
Risk Centre (risks, tasks, actions)	–	–	✓	✓	–
Operations Trackers Suite + Inclusion Case Mgmt	–	–	✓	✓	–
Training Module (Courses, Sessions, Venues)	–	–	✓	✓	–
Quality Reviews & QIP module	–	–	✓	✓	–
Sampling & Observations	–	–	✓	✓	–
Ofsted Readiness module + Self Evaluation Form	–	–	✓	✓	–
Safeguarding Hub	–	–	✓	✓	–
Governance & DfE Compliance	–	–	✓	✓	–
Funding & Finance dashboards (incl. ROI)	–	–	✓	✓	–
DM Sales (Pipeline / Targets / Allocations)	–	–	✓	✓	–

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Four tiers, priced per active learner. Add-ons separately.