

BY FUNCTION · 02

Quality & Curriculum

Quality assurance, sampling, observation, standardisation, EPA, programme gaps, EDI and the Quality Improvement Plan.

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 · ~25 pages

Operations

Onboarding Module (Admissions Pipeline · Skills Scan · RPL & Funding) · 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) · Curriculum Module (AI Builder · Coverage · Lifecycle)

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

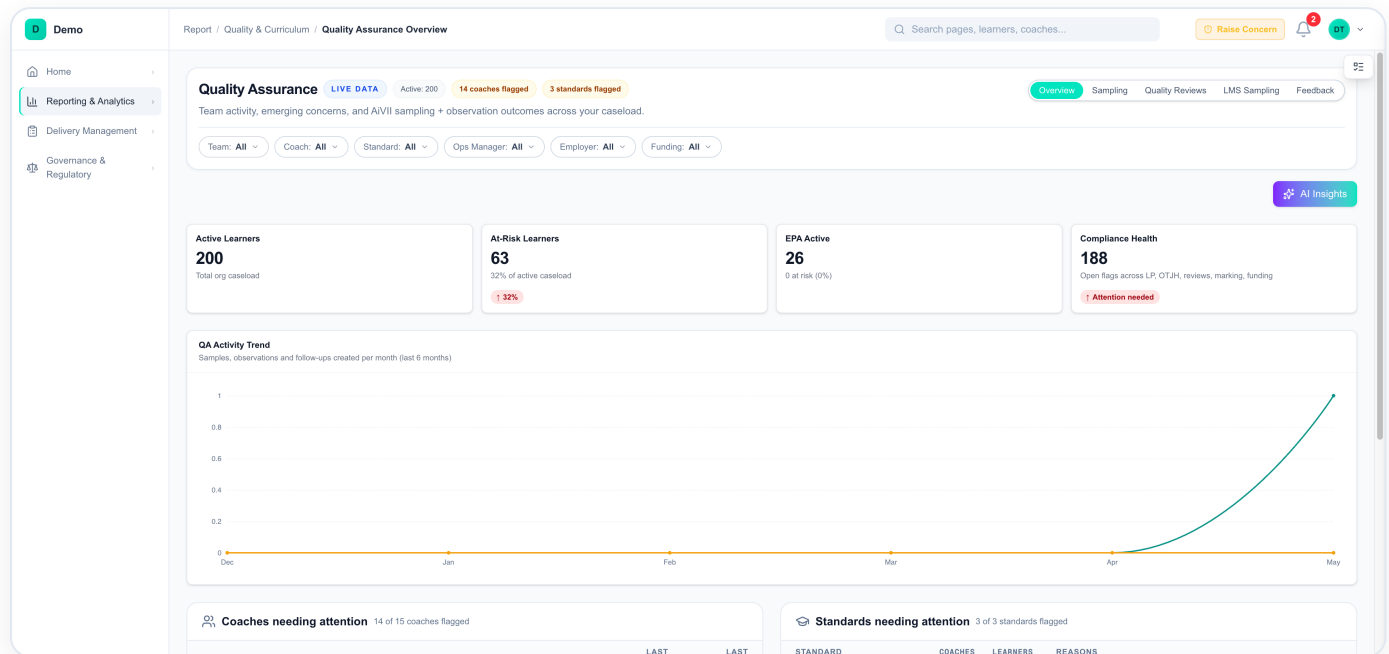
Governance

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

QA OVERVIEW

Sampling done. Coverage seen. Workload balanced.

QA Overview is the team-level view of internal quality assurance: samples completed, rating distribution, coverage by coach and activity type, and which IQAs carry the workload. Quality Managers use it to spot under-sampled coaches and activity gaps before audit.



01 WHAT IT ANSWERS

- How many samples have we completed this quarter / year?
- What's the distribution across Outstanding / Good / RI / Inadequate?
- Which coaches are under-sampled?
- Which activity types are missing coverage?
- Are our IQAs balanced on workload?

02 KEY METRICS SHOWN

- **Total Samples** all completed samples
- **Coaches Sampled** distinct coaches with samples
- **Samples This Quarter** vs last quarter
- **Ratings by Coach (%)** stacked bar per coach
- **Activity Sampling Coverage** unsampled / sampled / coverage % by coach
- **Recent Samples** expandable table with summary rows

11 WIDGETS

- **Good/Outstanding** % of samples at Good or above
- **Internal Quality Assurers** active IQAs this period
- **Sample Ratings** Outstanding / Good / RI / Inadequate distribution
- **Activity Types Sampled** type / total / sampled / coverage %
- **IQA Workload** this quarter vs last quarter

03 DRILL-THROUGHS

- Click a coach row → that coach's sample list
- Click an Activity Type → samples on that activity
- Click a rating segment → named samples in that bucket
- Recent Samples expand → full sample detail

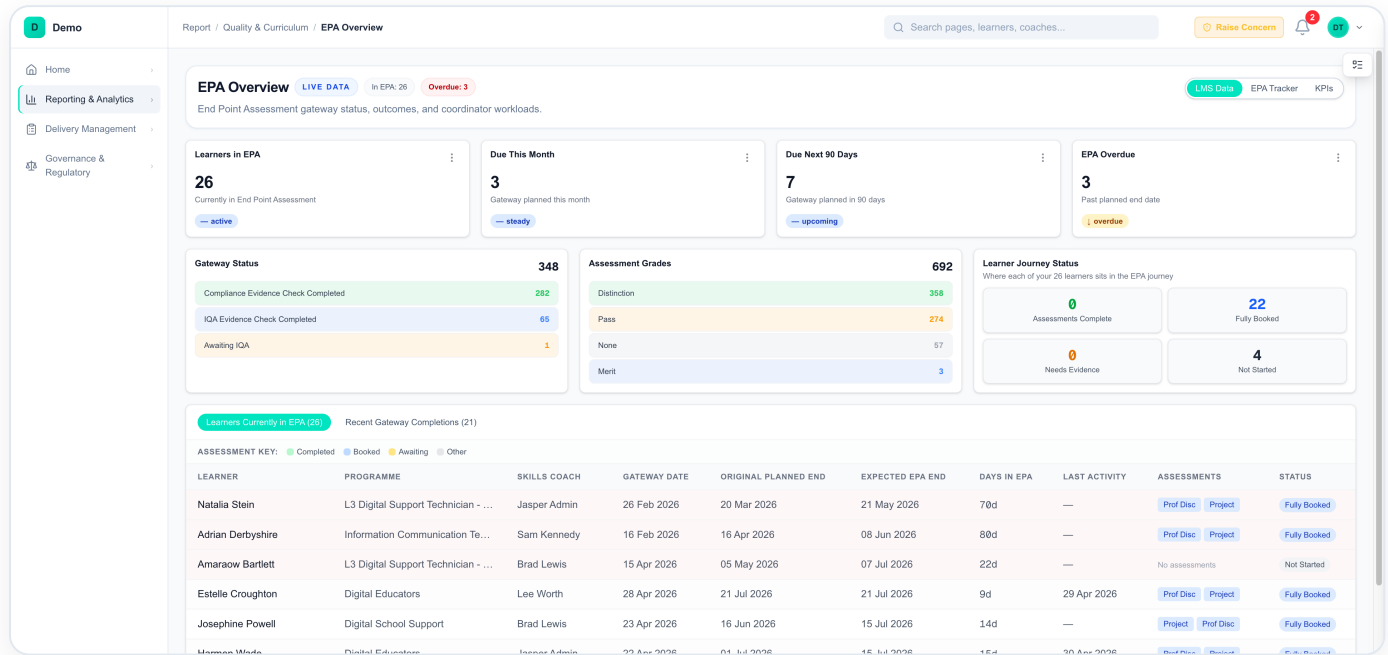
04 FILTERS & SCOPING

- **All Coaches / All Reasons / All Ratings / All IQAs** filters
- **Tabs:** Overview · Observations · IQA Sampling · Feedback (parent navigation)
- **Coverage gap** highlighted in the Activity Coverage table for easy targeting

EPA OVERVIEW

Every learner in End Point Assessment, on one page.

EPA Overview tracks every learner currently in End Point Assessment: how many are in flight, due this month, due in the next 90 days, and overdue. Pie charts surface gateway status and grade distribution; the per-learner table shows coordinator, gateway date, days in EPA and assessment status.



01 WHAT IT ANSWERS

- How many learners are in EPA right now?
- Who's due this month / next 90 days?
- Who's overdue and how long for?
- What's the gateway status distribution?
- What grades are coming back from EPAOs?

02 KEY METRICS SHOWN

- **Learners in EPA** currently in flight
- **Due Next 90 Days** forward-looking purple
- **Gateway Status** pie distribution
- **Learner Journey Status** Complete / Booked / Needs Evidence / Not Started
- **Recent Gateway Completions** historical context table

9 WIDGETS

- **Due This Month** amber count
- **EPA Overdue** red flag
- **Assessment Grades** grade distribution pie
- **Learners Currently in EPA** 10-col detail table

03 DRILL-THROUGHS

- Click any KPI → matching learner list
- Click a learner row → **Learner Detail (360)**
- Click Gateway Status segment → learners at that status
- Click Grade segment → learners with that grade

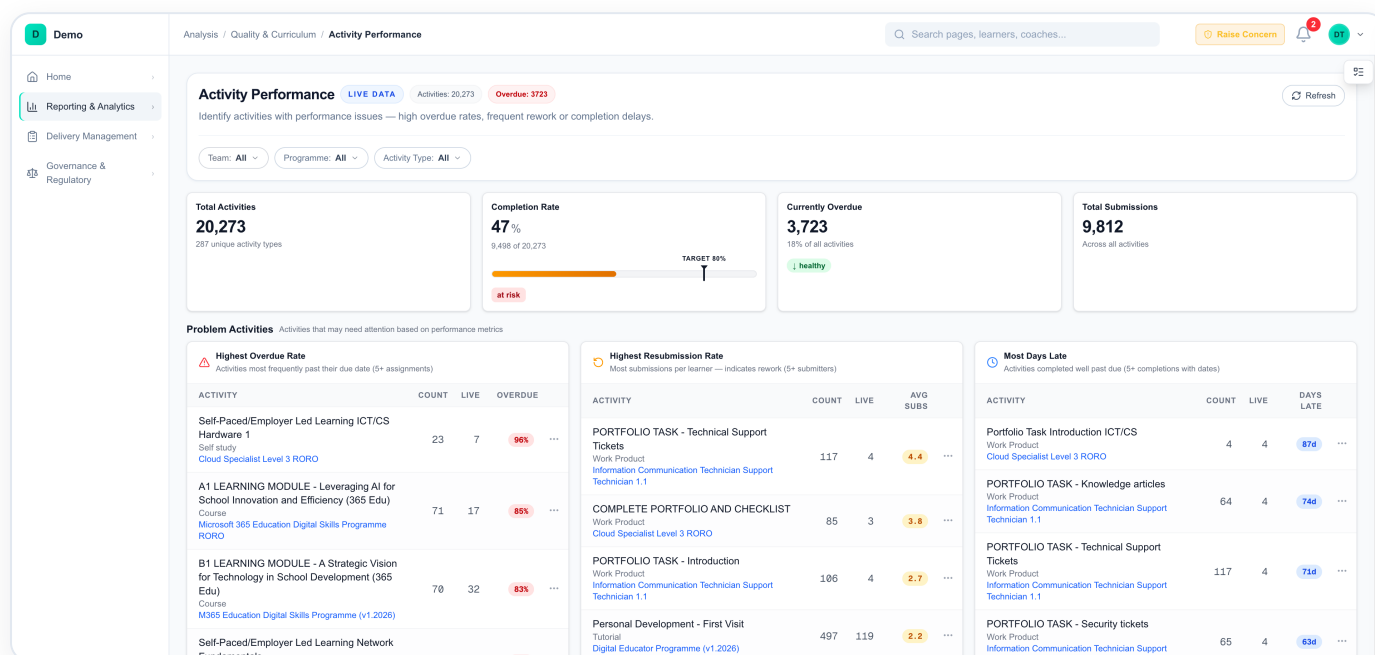
04 TABS & SCOPING

- **Tabs**: Overview (LMS Data) · EPA Tracker
- Sortable columns on every table for fast triage
- Days in EPA shown explicitly to spot stalled cases
- Coordinator column for direct ownership

ACTIVITY PERFORMANCE & PROGRAMME GAPS

The curriculum holes Ofsted will find. Before they do.

Two related views of programme content quality. **Activity Performance** shows how each activity within a programme is performing: completion rates, time-to-complete, learner ratings. **Programme Gaps** identifies KSB (Knowledge, Skills, Behaviour) criteria that aren't mapped to any activity: the curriculum holes that get caught on a deep dive.



01 WHAT IT ANSWERS

- Which activities are dragging programme completion?
- Where are our KSB coverage gaps?
- Which programmes need curriculum mapping work?
- Which activities have the worst learner satisfaction?
- Where does our Learning Plan design need rebuilding?

02 KEY METRICS SHOWN

- **Activity completion rate** distribution per activity
- **Time-to-complete** expected vs actual benchmarks
- **KSB Coverage %** per programme overview
- **Activities not mapped to KSBs** orphan activity list
- **Pass rate by activity** benchmarked against programme
- **Learner ratings per activity** satisfaction distribution
- **Unmapped KSB criteria** list of holes by programme
- **Programme mapping gap report** exportable for curriculum work

03 DRILL-THROUGHS

- Click an activity → learners on that activity
- Click a KSB criterion → learners affected by gap
- Click a programme → gap detail breakdown
- Export → curriculum work pack

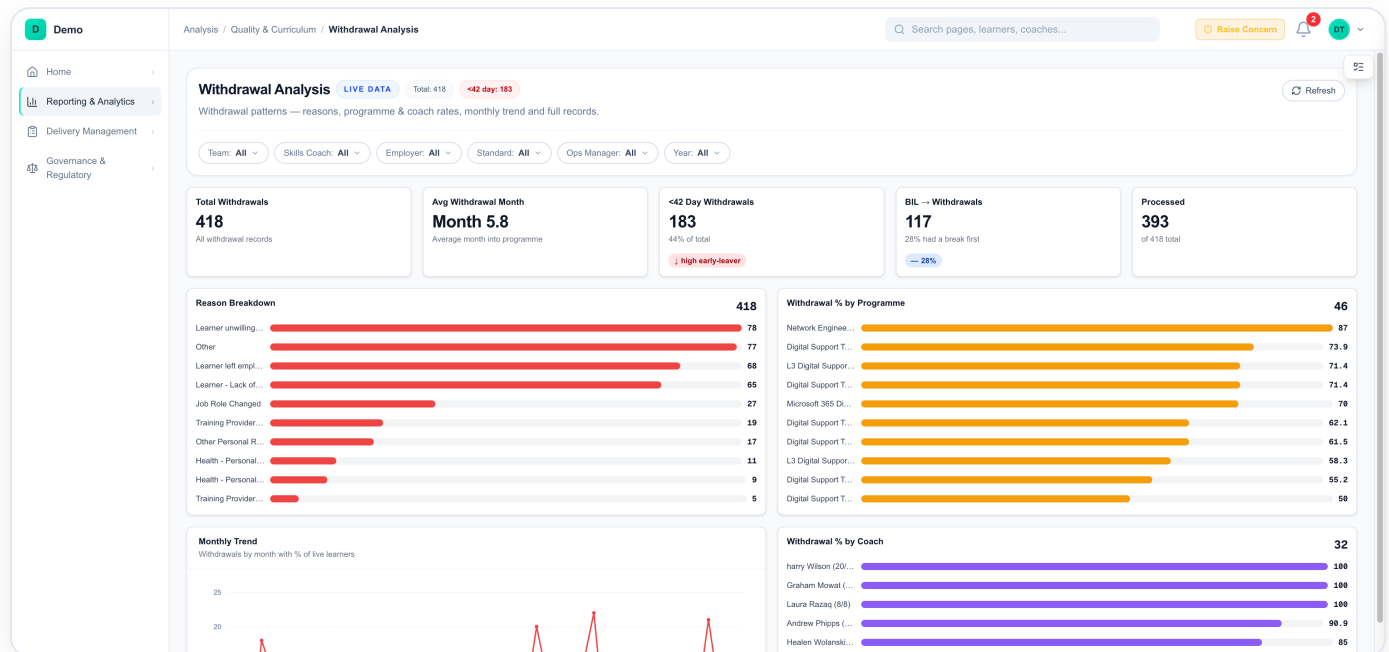
04 FILTERS & SCOPING

- **Programme** filter for focused review
- **Standard** filter for sector benchmarks
- **Hybrid Year** for trend comparison
- Pairs with **Programme Builder** in the Funding Forecasting workflow

LIFECYCLE ANALYTICS

Where you lose learners. Why. At what cost.

Three views of the big learner-leakage patterns rolled up into one analytical hub: **Withdrawals**, **Past PED (Overrunners)** and **Breaks in Learning**. Each section answers where, why, and at what cost. Estimated funding loss is calculated against ESFA OPP rules, so the past-PED page tells you the true bottom-line cost of overrunning.



01 WHAT IT ANSWERS

- Where are we losing learners: and why?
- How many are currently overrunning their planned end date?
- What does past-PED cost us in funding leak?
- How many learners are on Break in Learning, and how long?
- What's the trend on early withdrawals (<42 days)?

02 KEY METRICS SHOWN

- **Total Withdrawals** Withdrawals view
- **<42 Day Withdrawals** early-withdrawal flag
- **Currently Overrunning** PED view, live count
- **Est. Funding Lost** OPP-rule calc
- **Total Breaks** BIL view
- **Returned** successful return count
- **Return Variance** timeliness flag
- **Severity Distribution** 0-30 / 31-90 / 91-180 / 180+ days

15 KPIS ACROSS 3 VIEWS

- **Avg Withdrawal Month** when in journey
- **BIL to Withdrawal** conversion rate
- **Avg Days Overdue** severity indicator
- **Severe (90+ Days)** red-flag overrunners
- **Currently Active** live BILs
- **Avg Duration** days on break
- **Charts** monthly trend, reason / programme / coach

03 DRILL-THROUGHS

- Withdrawals table → named withdrawn learners + reason / payback estimate
- Overrunning Learners table → past-PED detail + monthly OPP excess cost
- Currently on Break table → active BILs with expected return
- Click programme / coach bar → learners contributing to that segment

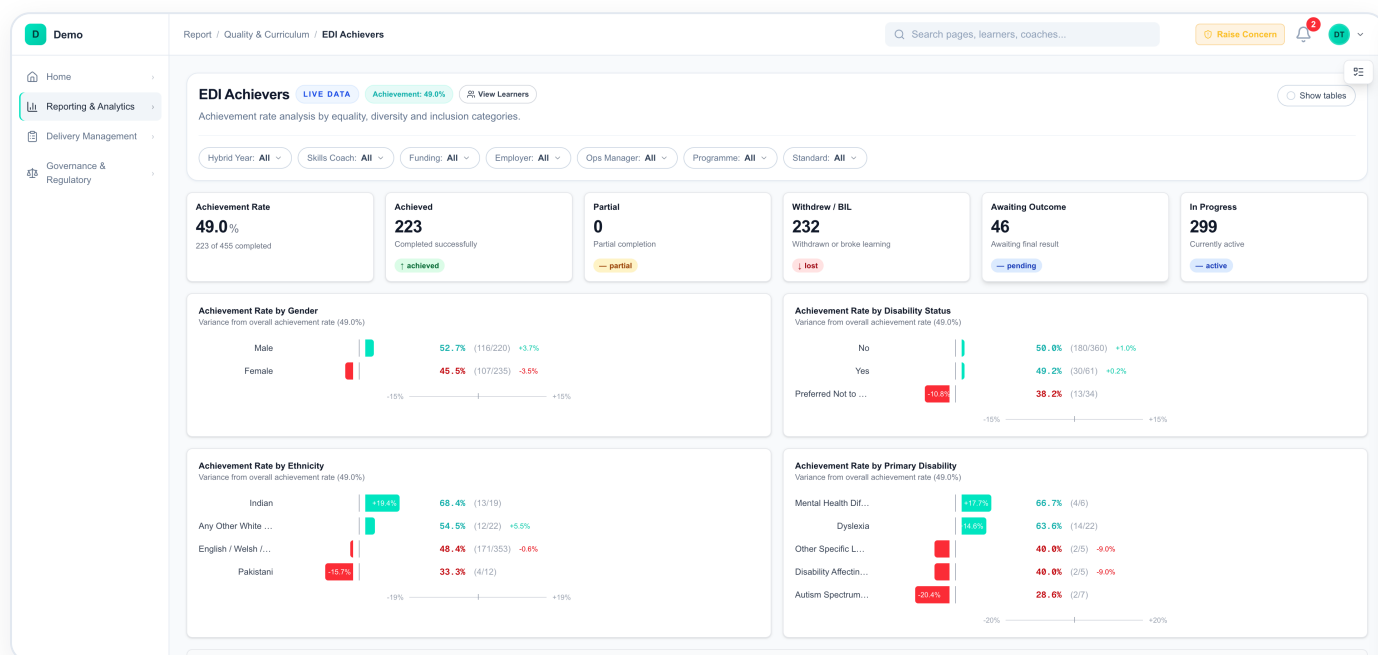
04 FILTERS & SCOPING

- Per-view filters: **Hybrid Year** · **Programme** · **Standard** · **Coach**
- Estimated funding loss uses ESFA OPP rules: honest, not optimistic
- Worst-programme rankings make targeted curriculum reviews trivially easy

EDI ACHIEVERS

Equality monitoring. In seconds, not spreadsheets.

EDI Achievers shows whether different demographic groups achieve at the same rate. Diverging bar charts compare achievement variance from the overall rate by Gender, Disability Status, Ethnicity and Primary Disability: letting Quality Leaders see at a glance where intervention is needed. Toggle to summary tables when you need evidence for a Self-Evaluation Form or governance pack.



01 WHAT IT ANSWERS

- What's our overall achievement rate?
- Are there gaps by gender, disability status, or ethnicity?
- Which programmes show the widest EDI gaps?
- Who's been withdrawn vs partial vs achieved by demographic?
- Where do we need to focus intervention?

02 KEY METRICS SHOWN

- **Overall Achievement Rate** headline %
- **Partial** amber card, drill-through
- **Awaiting** purple card, drill-through
- **Achievement Rate by Gender** diverging bar variance
- **Achievement Rate by Ethnicity** diverging bar variance

10 WIDGETS

- **Achieved** teal card, drill-through
- **Withdrawn/BIL** red card, drill-through
- **In Progress** blue card, drill-through
- **Achievement Rate by Disability Status** diverging bar variance
- **Achievement Rate by Primary Disability** diverging bar variance

03 DRILL-THROUGHS

- Click Achieved / Partial / Withdrawn / Awaiting / In Progress → outcome-filtered learner list
- Click any demographic bar → learners in that group
- View All Learners → full unfiltered cohort

04 FILTERS & SCOPING

- **Hybrid Year · Skills Coach · Funding · Employer** (single selects)
- **Ops Manager · Programme · Standard** (multi-select checkboxes)
- **Show Charts / Show Tables** toggle: tables version exports cleanly to evidence packs
- **Clear All** button to reset

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?

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

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

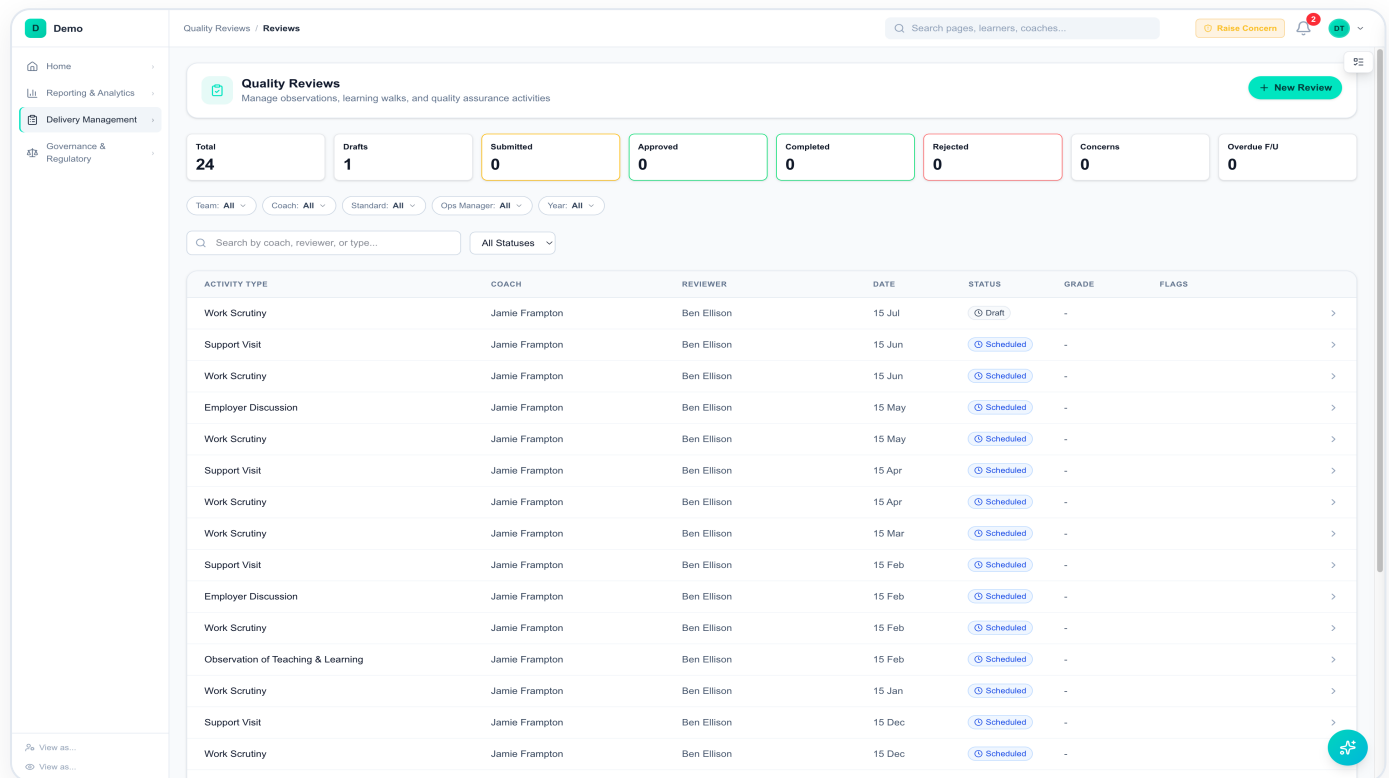
04 FILTERS & SCOPING

- **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*

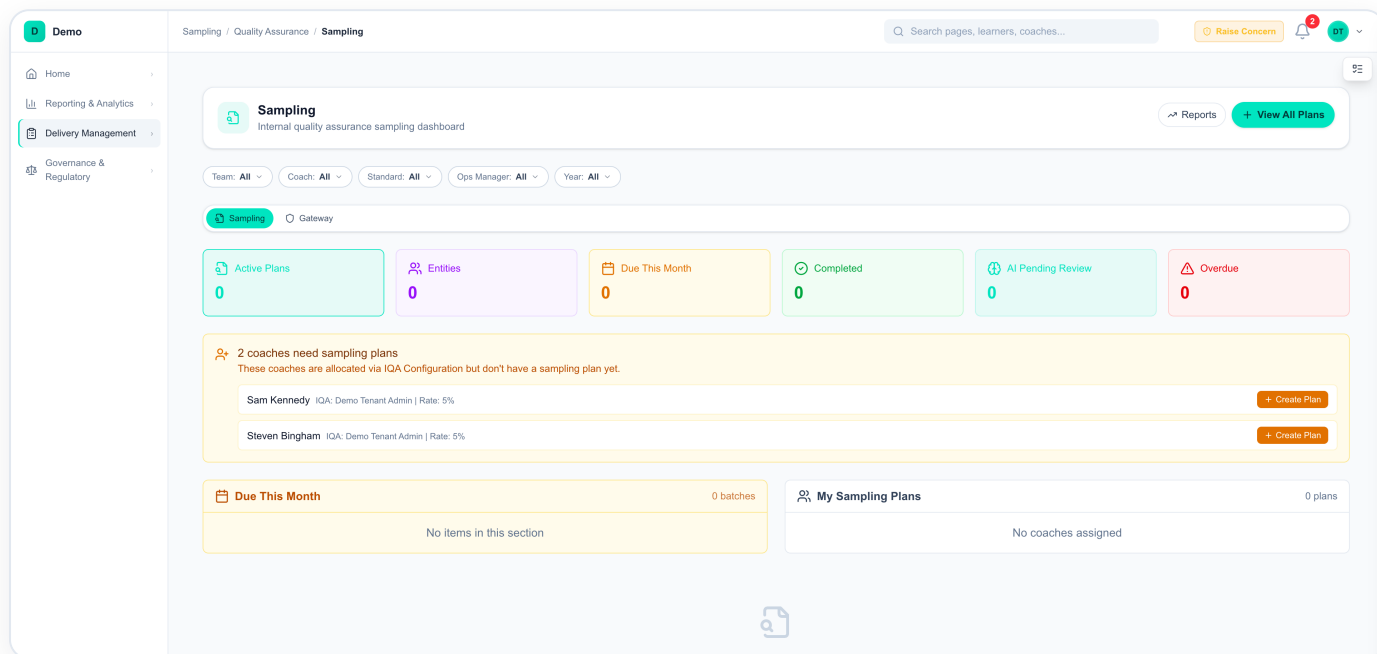
Reports view → evidence pack.

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

4 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

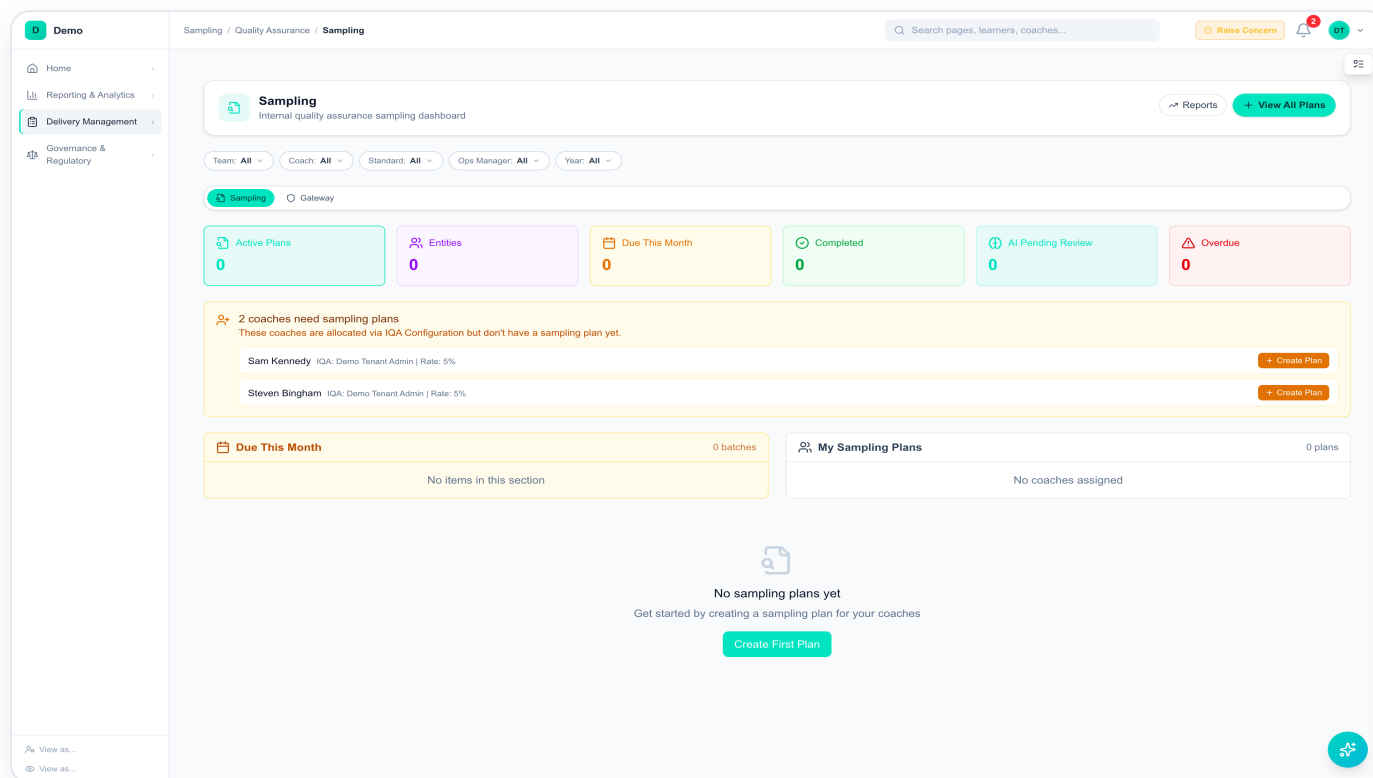
04 FILTERS & WORKFLOW

- **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*

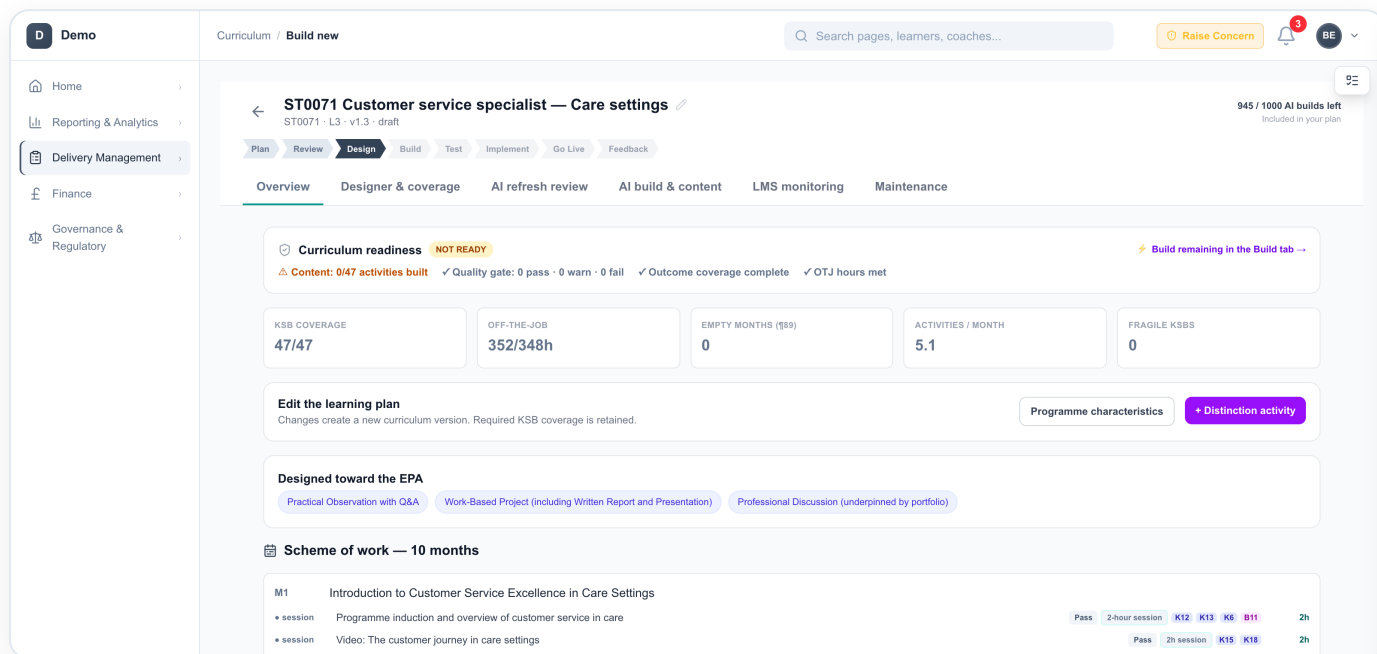
Gateway sampling protects the achievement rate.

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.

CURRICULUM MODULE · NEW HEADLINER

Curriculum that keeps itself current.

The Curriculum Module takes a programme from standard to delivered lesson. The **AI Curriculum Builder** generates a full learning plan from an apprenticeship standard or Ofqual qualification spec, tuned to your delivery cadence. The **coverage matrix** proves every KSB and outcome is mapped: distinction items included. **AI content authoring** builds the lessons with a quality gate per item. The **lifecycle engine** watches standard versions and flags what changes. **SCORM export** and **LMS monitoring** close the loop with delivery.



01 WHAT IT ANSWERS

- Does our curriculum cover every KSB and outcome: and can we show it?
- What has to change when the standard changes?
- Which learning-plan activities perform worst in delivery?
- Is generated content up to the quality bar?
- Can we publish straight to our LMS, on brand?

03 AI FEATURES

- **AI Curriculum Builder:** month-by-month plan generated from the standard, KSB-sequenced
- **Build chat:** iterate each content item conversationally, against the quality bar
- **AI refresh review:** when a standard version changes, AI recommends what stays and what changes

02 SUB-FEATURES

- **AI Curriculum Builder** plan from standard / Ofqual spec + delivery cadence
- **AI content authoring** text, callouts, activities, flashcards, scenarios
- **Video generation** lesson videos where a video provider is connected
- **AI refresh review** what stays and what changes, recommended
- **LMS monitoring** linked programme + activity performance

10 FEATURES + AI

- **Coverage matrix** every KSB / outcome, incl. distinction-only items
- **Quality gate + readiness** per-item checks before anything publishes
- **Lifecycle + watch list** version checks, standard-change flags
- **Import & restructure** Ofqual validation + replacement lookup
- **SCORM & export** org template, colour theme, tone of voice applied

04 WORKFLOW

- **Choose** the standard or qualification; set duration, cadence, content types
- **Generate** the learning plan; check the coverage matrix
- **Build** content through the quality gate; render video where enabled
- **Publish:** SCORM / export on brand; link the LMS programme
- **Maintain:** watch list + refresh reviews keep it current

CURRICULUM MODULE · IN PRACTICE

From standard to SCORM. And kept current after.

How curriculum leads use the module across the lifecycle: brief the builder, verify coverage, author the content, publish on brand, and let the watch list guard against standard changes.

Build brief

Standard, duration, OTJ hours, delivery methods, content types: the builder's inputs, IfATE-grounded.

Generated learning plan

Month-by-month plan with planned activity and OTJ hours in every month, KSB-sequenced to gateway.

Build content

Each plan item becomes a content build: authored to the quality bar, iterated by chat, exportable.

Lifecycle & monitoring

Watch list, standard-change detection, LMS programme link and activity performance.

CURRICULUM DIRECTOR *Standard revision lands*

Standard change detected.

The watch list flags a new version of a delivered standard. The **AI refresh review** compares the live curriculum against it: a handful of KSBs changed, two activities need updating, the rest stands. **Decide what stays and what changes**, approve, and the coverage matrix updates with a full trail: no mid-inspection surprises.

QUALITY LEAD *New programme, one afternoon*

From spec to SCORM.

Pick the standard, set 18 months day-release, generate. The **coverage matrix** confirms every KSB plus distinction items. Build the content through the **quality gate**, export SCORM with the provider's template and tone of voice, and link the LMS programme: **monitored from day one**.

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.

Standardisation
Ensure consistent assessment practices across your team through standardisation activities

Total Events 2 **Upcoming** 2 **Completed** 0 **Confirmed Attendees** 0

Search events...

EVENT	TYPE	DATE & TIME	LEAD	ATTENDANCE	STATUS
Moderation of FS English S&L Assessment Type	Moderation	20 May 2026 - 10:00 AM Virtual	Ben Ellison	0 / 0	Planned
Operations Manager Assignment 1 Standardisation Programme Specific	Standardisation Meeting	19 Feb 2026 - 10:00 AM	Demo Tenant Admin	0 / 0	Planned

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

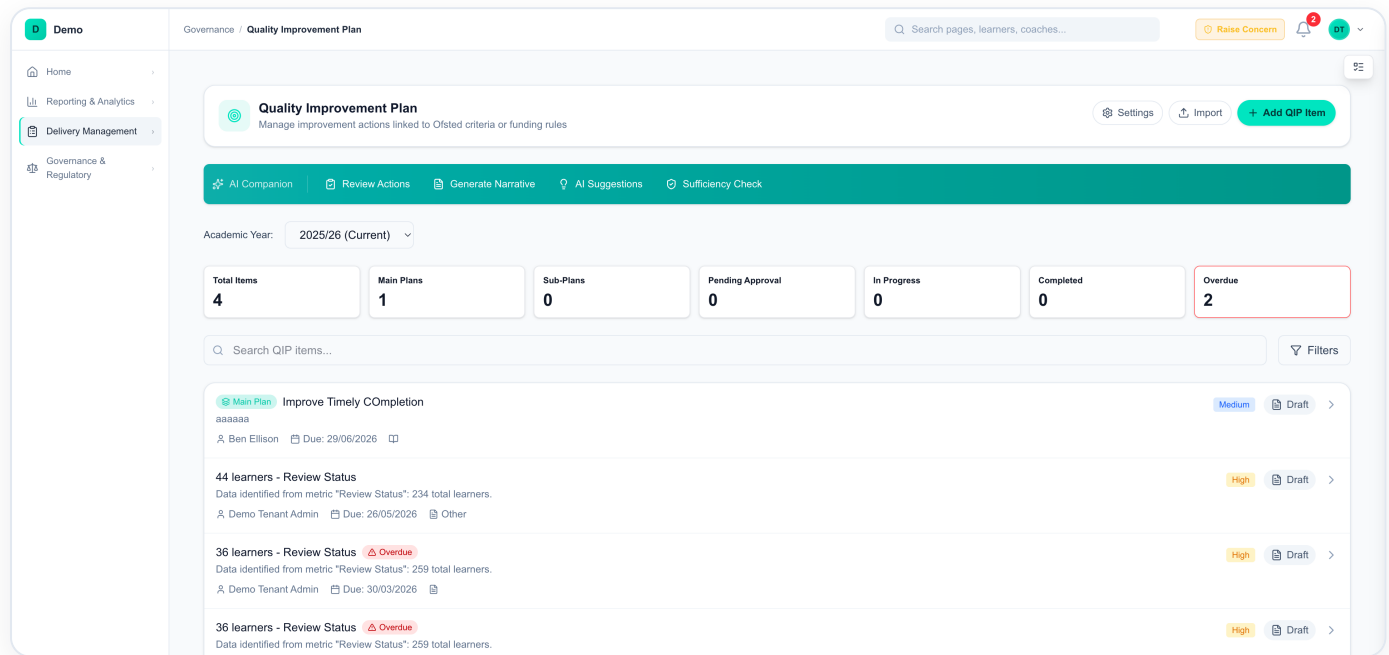
04 FILTERS & SCOPING

- **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

QUALITY IMPROVEMENT PLAN · HEADLINER

From Ofsted finding to closed action. Tracked.

QIP is the action-tracking system for Ofsted Areas for Improvement and funding rule remediation. AI QIP Companion (ControlAI) generates draft plans from your data: suggesting actions, owners, KPIs and target dates. Per-plan detail covers area for improvement, owner, priority (Low / Medium / High / Critical), expected start / end dates, programme, sub-plans, collaborators, Ofsted criteria reference, funding rule reference, activity count, comments and approvals.



01 WHAT IT ANSWERS

- What plans are open, in progress, completed, overdue?
- Who owns each plan and what's their priority?
- Which plans link to specific Ofsted criteria or funding rules?
- What sub-plans, collaborators and activities sit under each?
- What's the approval status: draft, pending, approved?

02 KEY METRICS SHOWN

- **Total / In Progress / Completed / Overdue** 4 headline KPIs
- **Status** 6 states (Draft / Pending / Approved / In Progress / Completed / Cancelled)
- **Owner / Priority** accountability + 4 priority levels
- **Academic Year / Programme / Department / Team** 4 scoping dimensions
- **Ofsted Criteria Reference** area + criterion dropdown
- **Per-plan edit** 4 analysis panels + approval flow

4 KPIS + ~20 COLUMNS

- **Title / Area for Improvement** 2 columns
- **Approval Status** workflow indicator
- **Expected Start / End / Actual Completion** 3 dates
- **Activity Count / Comments / Sub-plans / Collaborators** 4 nested counts
- **Funding Rule Reference** rule + funding type
- **Bulk import / settings** CSV / Excel + system defaults

03 AI FEATURES (CONTROLAI)

- **AI QIP Companion toolbar** at the top of the QIP page
- **AI suggestion prefill** when creating a new plan: populates title, area, owner, dates from your data
- **4 analysis panels** per plan: root-cause / evidence / action / impact
- Pairs with Ofsted Companion for evidence linking

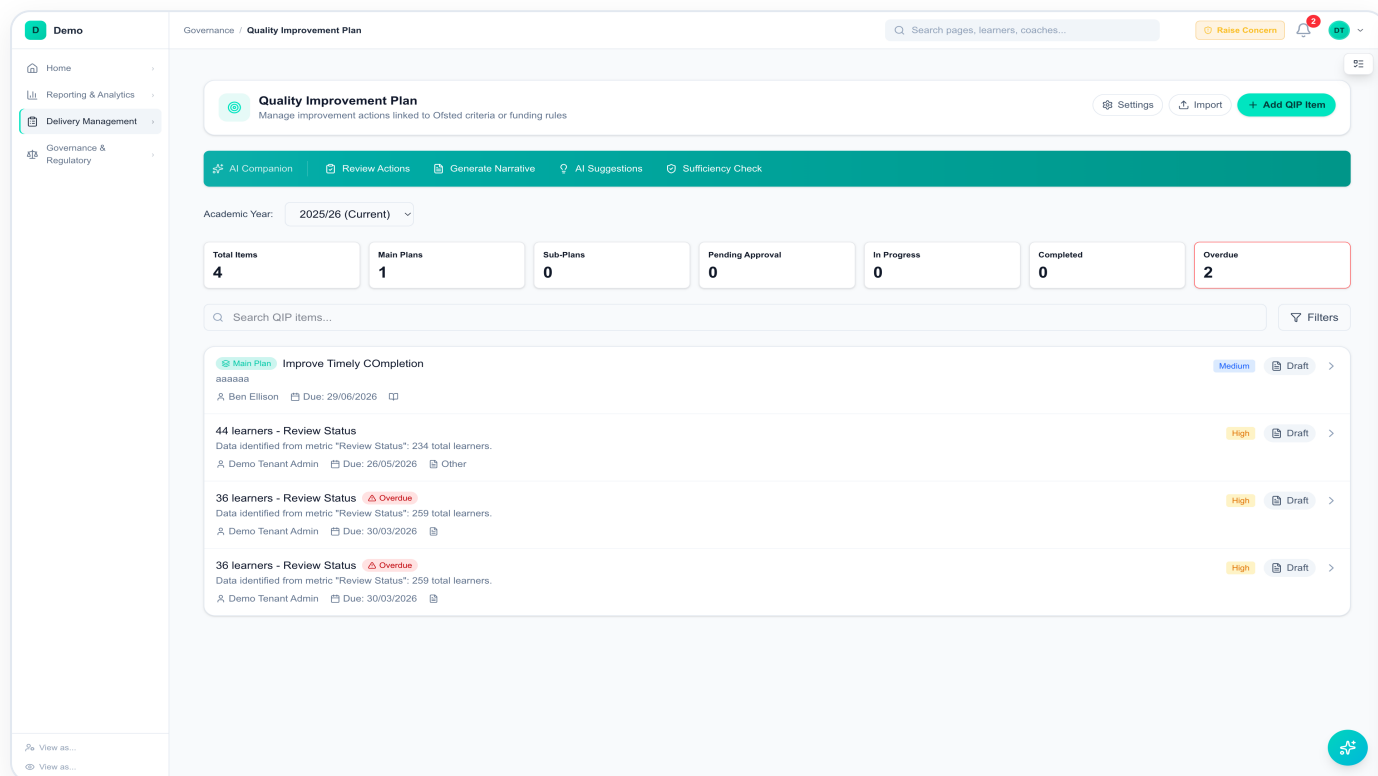
04 FILTERS & SCOPING

- **Search:** title / area / action
- **Filters:** Status / Department / Team / Owner / Link Type / Priority / Progress / Ofsted Area / Academic Year
- **Read-only mode** when displayed in Governance: reference-copy banner
- Read-only mode hides write affordances and drill-throughs

QUALITY IMPROVEMENT PLAN · IN PRACTICE

Ofsted finding to closed action. The workflow.

How quality, leadership and governance use QIP across the lifecycle. AI Companion drafts plans from your data; Ofsted criteria + funding rule references link every plan to its source; approval flow + evidence trail satisfies the auditor.



AI Companion toolbar

ControlAI. AI Companion / Review Actions / Generate Narrative / AI Suggestions / Sufficiency Check.

KPI cards

Total Items / Main Plans / Sub-Plans / Pending Approval / In Progress / Completed / Overdue.

Search QIP items

Free-text search across plan title / area / action.

Filters

Status / Department / Team / Owner / Link Type / Priority / Progress / Ofsted Area / Academic Year.

QUALITY LEAD *Post-inspection*

AI Companion drafts. You edit. You assign.

Inspection report received. **3 Areas for Improvement.** Open QIP, click **New Plan**. AI Companion drafts: title, suggested owner (matched to your team capability data), priority (High based on Ofsted weighting), suggested actions across 4 analysis panels, evidence references pulled from your library. **Edit, approve, distribute.** Three plans live within an afternoon instead of three weeks.

SENIOR LEADER *Quarterly review*

Filter to Critical priority. Surface stalled actions.

Open QIP. Filter Status = In Progress, Priority = Critical. **14 plans.** Sort by Last Updated: 4 plans not updated in 30 days. Click each: 2 are blocked on missing evidence, 2 on owner availability. **Action plan** for the next leadership meeting: unblock these specifically. Followed by an Approval Flow review of plans pending sign-off.

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	–	–	✓	✓	–
Onboarding Module (Admissions Pipeline, Skills Scan, RPL)	–	–	✓	✓	–
Training Module (Courses, Sessions, Venues)	–	–	✓	✓	–
Curriculum Module (AI Builder, Coverage, Lifecycle)	–	–	✓	✓	–
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)	–	–	✓	✓	–
AI Daily Briefing	–	–	✓	✓	–
FULL AI SUITE					
AI QIP Companion + AI Ofsted Companion	–	–	–	✓	–
AI Coaching insights / Review Prep / Chatbot	–	–	–	✓	–
AI Sampling Suggestions / Analytics / Trainer Briefings	–	–	–	✓	–
Dedicated account manager	–	–	–	✓	–
ADD-ON MODULES (SEPARATE PURCHASE)					
Audit Centre (Funding Audit + PDSAT + FIS)	–	–	–	–	+

READY TO SEE IT?

Let's talk. 30 minutes. Your data.

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30-minute live walk-through, no commitment.

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PRICING

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