

HUB 01

Reporting & Analytics

Every dashboard your leaders, managers and coaches need. Real-time, role-aware, drill-through to the named learner.

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.

<p>01</p> <h2>Reporting & Analytics</h2> <p>7 sub-menus · ~30 pages</p> <p>Provider Performance Performance Snapshot · QAR · Accountability Framework</p> <hr/> <p>Operations Daily Operations · Skills Coach Dashboard · Coach Performance & Capacity · Trainer Dashboard · Learner Outlook</p> <hr/> <p>Quality & Curriculum QA · EPA · EDI Achievers · Observations & Sampling Reports · Activity & Programme · Lifecycle Analytics</p> <hr/> <p>Compliance Compliance & ILR Suite</p> <hr/> <p>Sales Sales Analytics · Employer Intelligence · Applicant Overview</p> <hr/> <p>Finance Funding Overview · Funding Forecasting · Learner Numbers</p> <hr/> <p>Learner & Employer Learner Detail (360) · Employer Detail · Performance · Location</p>	<p>02</p> <h2>Delivery Management</h2> <p>4 sub-menus · ~20 pages</p> <p>Operations Operations Trackers Suite (Gateways · Withdrawals & BIL · On Break · FS Support · ALS · In EPA) · Training Module</p> <hr/> <p>Quality Quality Reviews Suite (Observations · Sampling · Standardisation · IQA Configuration · Feedback)</p> <hr/> <p>Compliance Audit Centre (Funding Audit · PDSAT · FIS): add-on</p> <hr/> <p>Sales Pipeline · Targets · Salesperson Allocations</p>	<p>03</p> <h2>Governance & Regulatory</h2> <p>3 sub-menus · ~15 pages</p> <p>Ofsted Ofsted Readiness · Self Evaluation Form · Learning Walks · Case Sampling · Evidence Library · Scenario Practice</p> <hr/> <p>Safeguarding Safeguarding Hub · Log · Risk Assessments · Staff Register · Risk Register</p> <hr/> <p>Governance Governance Dashboard · DfE Compliance · Quality Improvement Plan · Board Management · Funding Scrutiny · Subcontracting · Risk Mgmt · Financial Submissions · Policy Repository</p>
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— SECTION 01

Reporting & Analytics

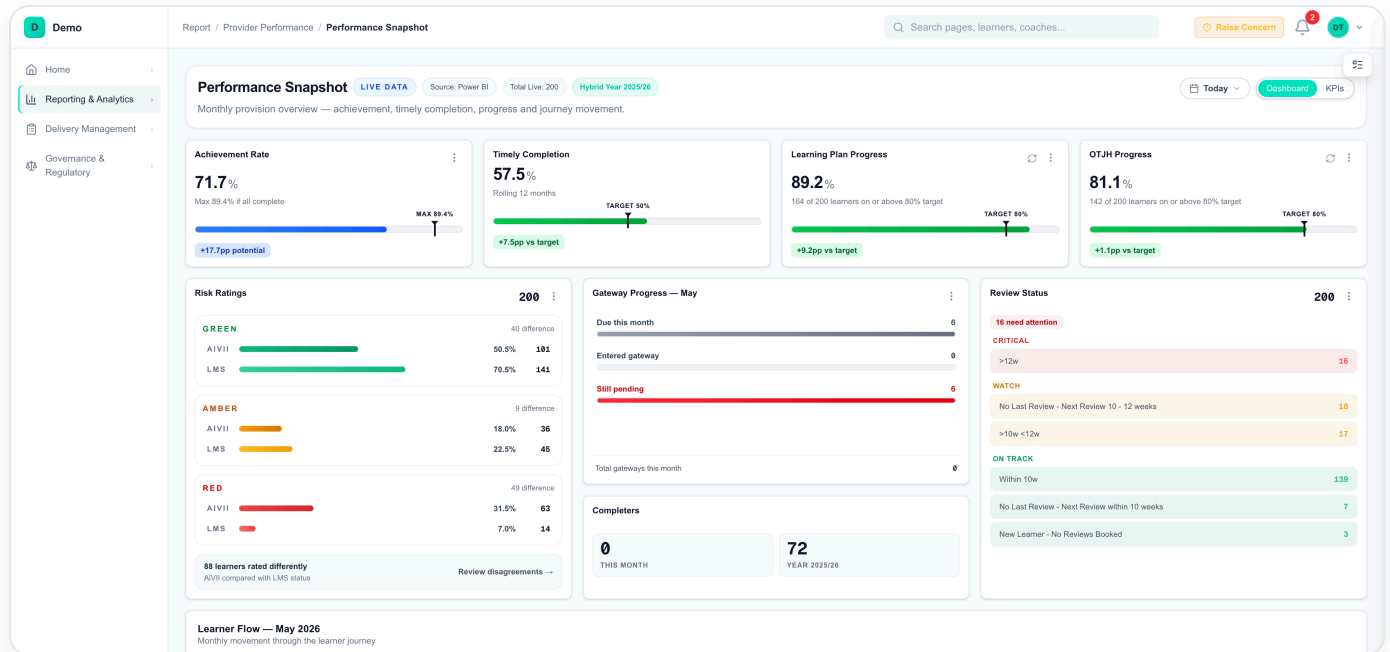
Every dashboard your leaders, managers and coaches need: from QAR to Daily Operations to Funding Forecasting: built on real-time data with role-aware scoping.

- Performance Snapshot CORE
- Skills Coach Dashboard CORE
- Trainer Dashboard CONTROL
- EPA Overview CLARITY
- Funding Overview CONTROL
- Employer Detail CORE
- QAR Dashboard CORE
- Coach Performance CLARITY
- Learner Outlook CLARITY
- Lifecycle Analytics CLARITY
- Funding Forecasting CONTROL
- Daily Operations CORE
- Coach Capacity CLARITY
- QA Overview CLARITY
- Sales Analytics CORE
- Learner Detail (360) CORE

PERFORMANCE SNAPSHOT

The whole provider, on one screen.

Performance Snapshot is what Senior Leaders open first: achievement rate, timely completion, gateway progress, learner flow, risk distribution and review status, all on a single page. Every chart drills to the named learners behind it; every count is an honest count from your live data.



01 WHAT IT ANSWERS

- Where are we against QAR target this hybrid year?
- How is timely completion trending across 12 months?
- Which gateways are at risk: past PED, due this month, or beyond?
- How are learners flowing: starts, withdrawals, gateways, completions?
- Are coaches keeping reviews on track?

02 KEY METRICS SHOWN

- **Achievement Rate** Current QAR, Max QAR, gap potential
- **Gateway Progress** to PED gateways this month
- **Progress Rates** Learning Plan % + OTJH %
- **LMS Risk Rating** comparison from source
- **Review Status** On Track / Warning / Overdue

10 WIDGETS

- **Timely Completion** gauge, 12-month rolling
- **Completers** this month + apprenticeship year
- **AiVII Risk Rating** RAG distribution
- **Active Learning** live status breakdown
- **Learner Flow** Starts → Live → Withdrawals → Gateways

03 DRILL-THROUGHS

- Click Gateway Progress → **Entered Gateway / PED Due / Gateways Remaining** drill modals
- Click a risk band → **Risk Centre** filtered to that band
- Click a review status → named learners in that bucket
- Click Active Learning segment → learners in that status
- Click Completers → **this month / this year** learner lists

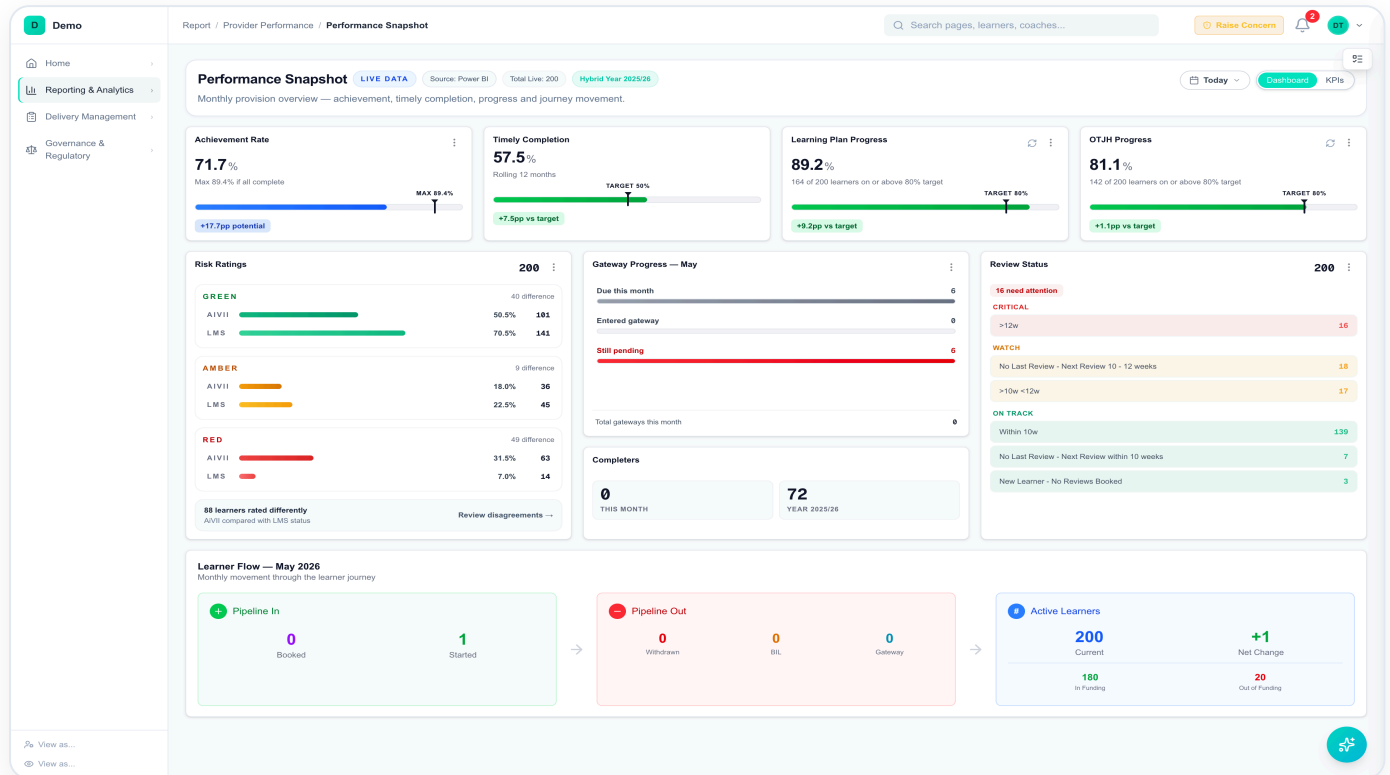
04 FILTERS & SCOPING

- **Role-aware default scope:** Senior Leaders see the whole provider; Operations Leaders see their teams
- **Hybrid Year · Funding type** applied via filter chip context
- **Drill-through preserves filters:** the named learner list inherits whatever's set on the page
- **KPI tracking tab** available for tenants with KPI targets configured

PERFORMANCE SNAPSHOT · IN PRACTICE

Five minutes of context that used to take an hour.

How leaders use Performance Snapshot through the week. Monday morning context for Senior Leaders, Friday review for Quality. Every chart drills to the named learners; every count is honest.



Achievement Rate

Current QAR vs Max QAR: ceiling potential if all in-progress achieve.

Risk Ratings. AiVII vs LMS

Side-by-side comparison surfaces disagreements where AiVII flags risk the LMS doesn't.

Gateway Progress

Due this month / Entered / Still pending: the current month gateway pipeline.

Drill-through anywhere

Click any chart segment and you're looking at the named learners contributing to it.

SENIOR LEADER Monday, 8:00am

Walk into the team meeting with one specific question.

Open Performance Snapshot. Scan **Achievement Rate**: we're 2.4pp under target, gap is recoverable. **Risk Rating** shows 12 reds moved up from amber overnight. Click the red band: named learners list, 9 on one Standard. By 8:15am you've got the question for stand-up: "Why are 9 of those reds on Engineering Level 3 specifically?"

QUALITY LEADER Friday, weekly review

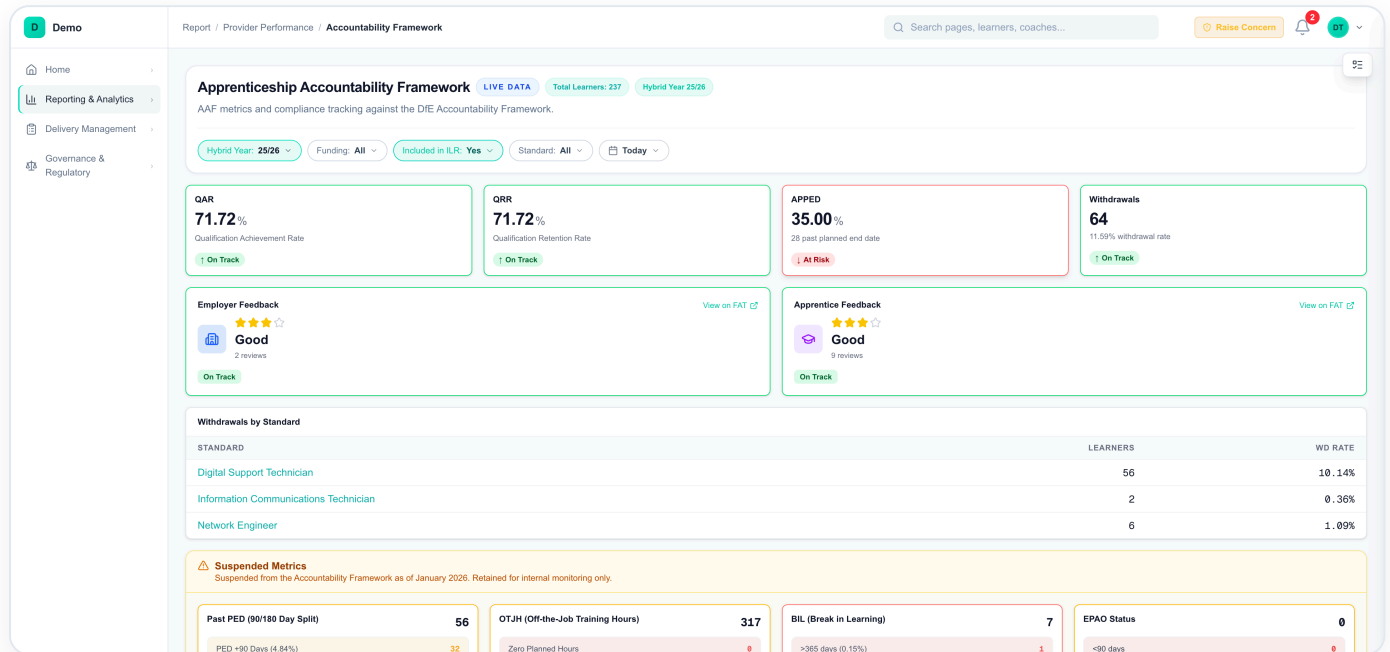
Spot the programme that needs a Standardisation event next week.

Filter to your team. Check **Timely Completion gauge** against target. Open **Review Status**: one programme has 18% overdue reviews, twice the next worst. Open the Standardisation tracker, schedule an event with that programme as the focus. Total time: 3 minutes.

ACCOUNTABILITY FRAMEWORK

All six AAF measures, aligned to Jan 2026.

Accountability Framework tracks every measure DfE assesses you against. QAR, QRR, APPED, Withdrawals, Employer Feedback, Apprentice Feedback: with current status, value, learner counts and direct drill-throughs into the suspended-learner population behind each compliance flag.



01 WHAT IT ANSWERS

- Where do we sit against each AAF measure right now?
- How many learners are past planned end date?
- What's the trend in withdrawals, by Standard?
- What does Find Apprenticeship Training say about us?
- Which learners are flagged on suspended compliance metrics?

02 KEY METRICS SHOWN

- **QAR** Quality Achievement Rate with status
- **APPED** % past planned end date
- **Employer Feedback** star rating + reviews (FAT)
- **Withdrawals by Standard** WD rate per Standard table
- **QRR** Quality Retention Rate with status
- **Withdrawals** count + WD rate
- **Apprentice Feedback** star rating + reviews (FAT)

7 CARDS

03 DRILL-THROUGHS

- Click APPED → named past-PED learners
- Click Withdrawals → all withdrawn learners
- Click a Standard row → withdrawn learners on that Standard
- Suspended panel → **PED > 90/180 days**, **Zero or Low Hours**, **BIL > 180/365 days**
- Click any measure card → named learners contributing to the number

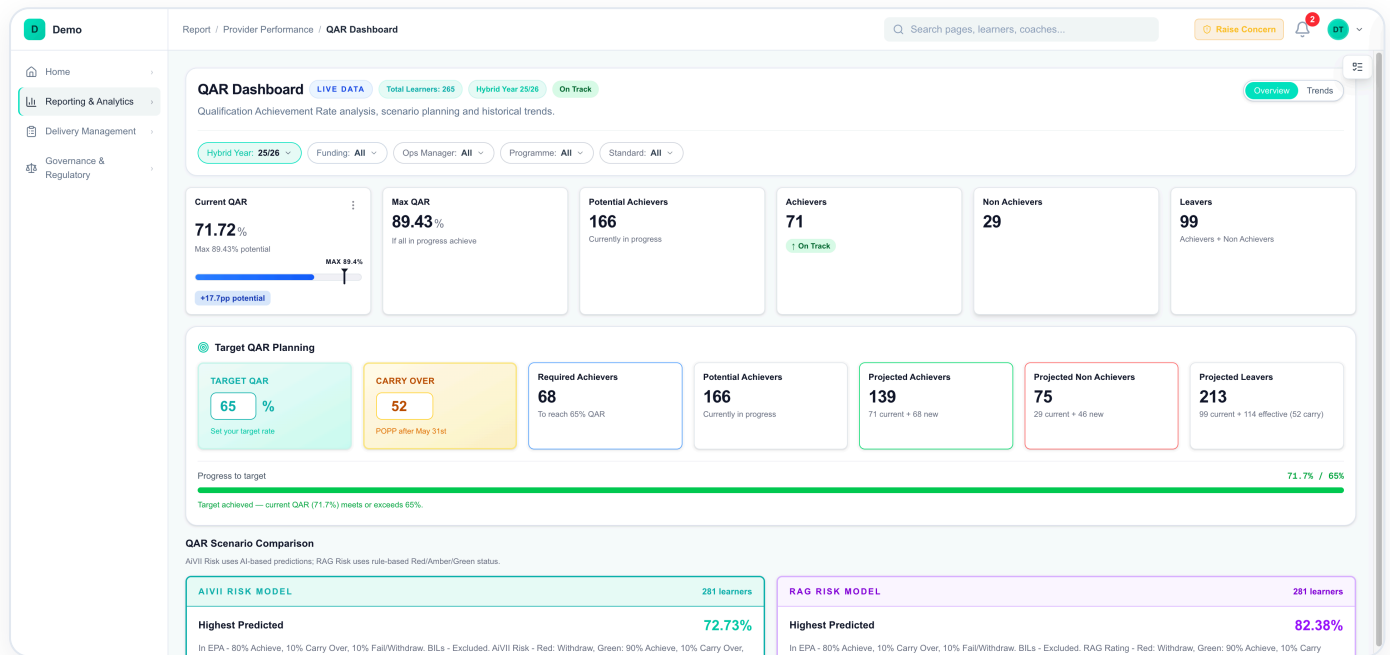
04 FILTERS & SCOPING

- **Hybrid Year**: switch between current and historical years
- **Funding type** filter
- **Included in ILR**: Yes / No / Both
- **Standard** filter for cohort scoping
- **Historical date picker** when historical data is available

QAR DASHBOARD

Where you are. Where you could be. What it'll take to get there.

QAR Dashboard models your achievement rate trajectory: current QAR, ceiling potential if all in-progress learners achieve, and dual scenario models (AiVII Risk vs LMS RAG) showing required vs projected outcomes against your target. Editable target rate and POPP carry-over let you stress-test the year.



01 WHAT IT ANSWERS

- What's our current QAR vs the ceiling potential?
- How many achievers do we need to hit target?
- How does it break down by hybrid year?
- Under each risk model, what's the projected outcome?
- What's our POPP carry-over after 31 May?

02 KEY METRICS SHOWN

- **Current QAR** live achievement rate
- **Potential Achievers** in-progress count
- **Non Achievers** already not achieved
- **Target QAR** editable scenario input
- **Required Achievers** to hit target
- **QAR by Hybrid Year** historical breakdown table

12+ CARDS

- **Max QAR** if all in-progress achieve
- **Achievers** already achieved
- **Leavers** Achievers + Non Achievers total
- **Carry Over** POPP after 31 May (editable)
- **Projected outcome cards** Achievers / Non / Leavers, 3 cards
- **Dual Risk Model scenarios** AiVII Risk + RAG, side-by-side

03 DRILL-THROUGHS

- Click View All Learners → full cohort
- Click Potential Achievers → in-progress learner list
- Click Achievers / Non Achievers / Leavers → named learner lists
- Click a hybrid year row → year-specific breakdown

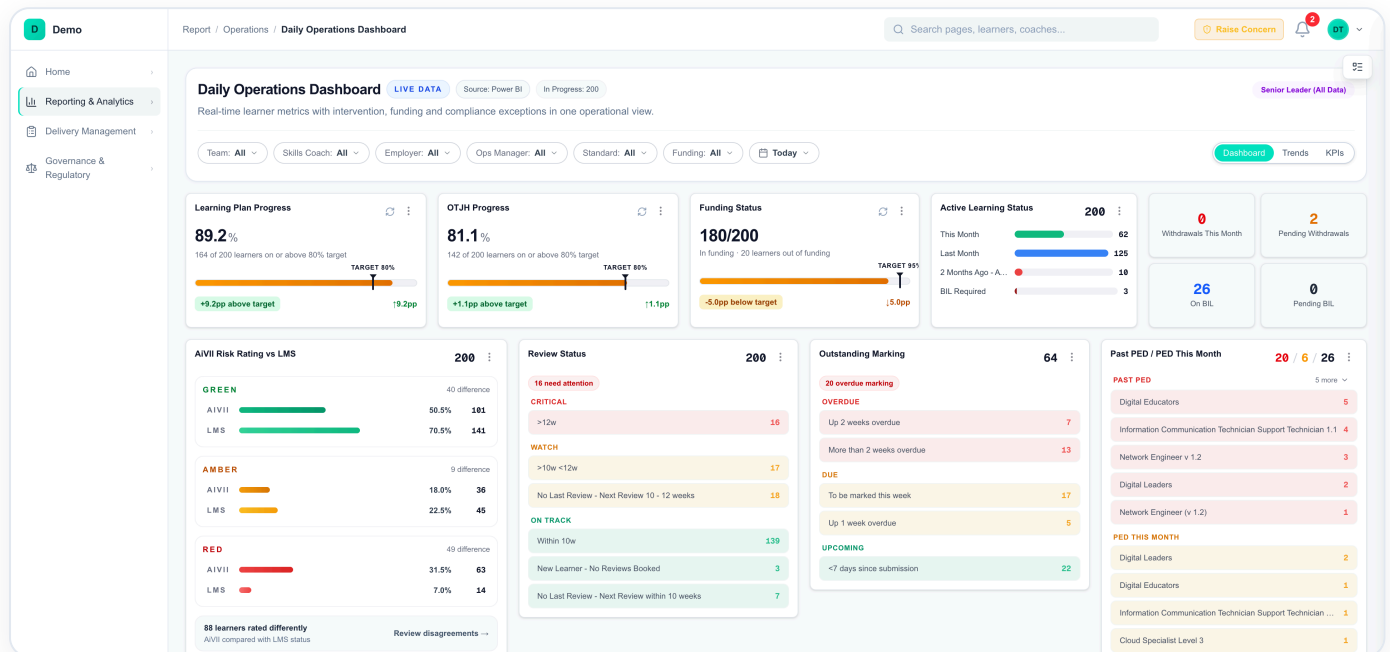
04 FILTERS & SCOPING

- **Hybrid Year · Funding · Ops Manager** (multi-select with search)
- **Programme · Standard** (multi-select with search)
- Editable scenario inputs persist for what-if modelling
- Risk model selection drives the right-side projection logic

DAILY OPERATIONS

Run the morning huddle from one screen

Daily Operations is the page Operations Managers open first. It surfaces everything that changed overnight, outstanding marking, off-track learners, risk movements, missed activities, coach workload, so leaders walk into the day knowing what to action and who to escalate to. Every metric drills to a learner; every count is honest.



01 WHAT IT ANSWERS

- What changed since yesterday and who needs to action it?
- Which coaches are behind on marking, and by how much?
- Which learners just moved into a higher risk band?
- Where is the bottleneck across the team this week?
- Who needs a coach 1:1 today?

02 KEY METRICS SHOWN

- **Learning Plan Progress** % of learners on or above 80% target
- **Funding Status** In funding / out of funding count
- **Withdrawals This Month** count this calendar month
- **On BIL** Break in Learning, currently active
- **AiVII Risk Rating** Green / Amber / Red distribution
- **Risk Disagreements** where AiVII flags a learner the LMS doesn't
- **Outstanding Marking** total · by coach · by age band

14 CARDS

- **OTJH Progress** Off-the-Job Hours % vs target
- **Active Learning Status** live status breakdown bar
- **Pending Withdrawals** initiated, not yet processed
- **Pending BIL** awaiting confirmation
- **LMS Risk Rating** comparable rating from source system
- **Review Status** distribution incl. overdue past trigger
- **Past PED / Due This Month** past planned end date breakdown

03 DRILL-THROUGHS

- Click a coach → **Coach Detail** with their full caseload
- Click a learner row → **Learner Detail (360)**
- Click a risk band → **Risk Centre** filtered to that band
- Click Outstanding Marking → per-coach drill with named learners
- Click Past PED → named learner list with planned end dates

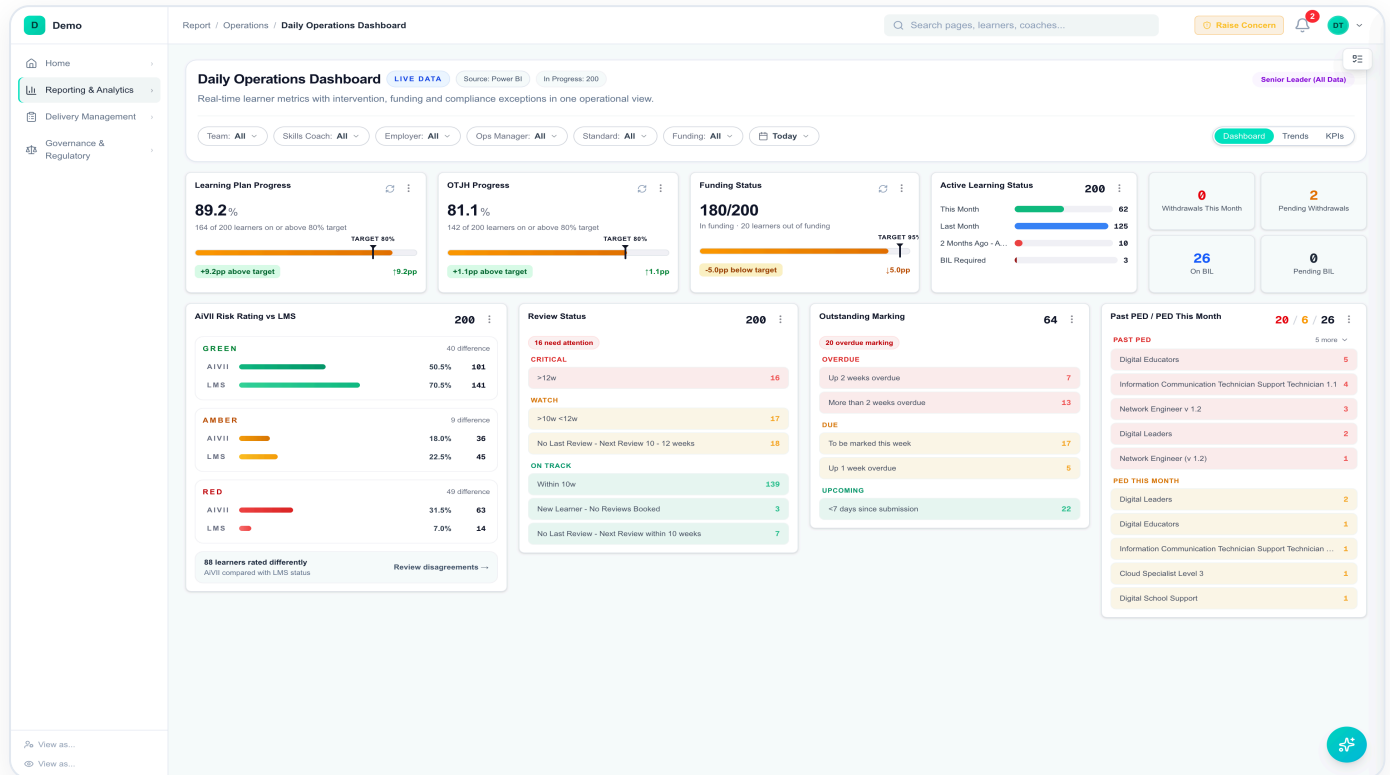
04 FILTERS & SCOPING

- **Hierarchical team filter:** senior leaders see all, managers see their teams, coaches see their caseload
- **Coach · programme · standard · cohort · period:** remembered per-user via saved preferences
- **Role-aware defaults:** a Skills Coach lands on their personal scope; Operations Leader on the whole team
- **Cross-page filter persistence:** carries to Coach Detail, Risk Centre and Performance Snapshot

DAILY OPERATIONS · IN PRACTICE

The morning huddle. Solved.

How Operations Managers and team leads run the daily standup with one screen. Everything that changed overnight, prioritised by what to action first.



Learning Plan + OTJH Progress

Top KPIs scoped to today's caseload: %, target lines, on/above-target counts.

Funding Status

In Funding / Out of Funding split with target line and PP variance.

Risk Ratings

AiVII Risk vs LMS RAG side-by-side: spot disagreements overnight.

Past PED This Month

Funding leak indicator: named learners not earning OPP this month.

OPERATIONS MANAGER Monday, 8:30am

Identify three priorities before the team meeting.

Open Daily Ops. **Outstanding Marking** shows 47 items overdue, 12 on one coach. Click into Coach Detail: coach was off sick last week. Action: redistribute the queue. **Risk Distribution** shows 5 learners moved into Critical overnight. Click the band → named list. Action: assign each to a coach for a 1:1. **Past PED tile** red: 3 learners earning no OPP. Action: chase the gateway date.

SKILLS COACH LEAD Weekly review, 30 min

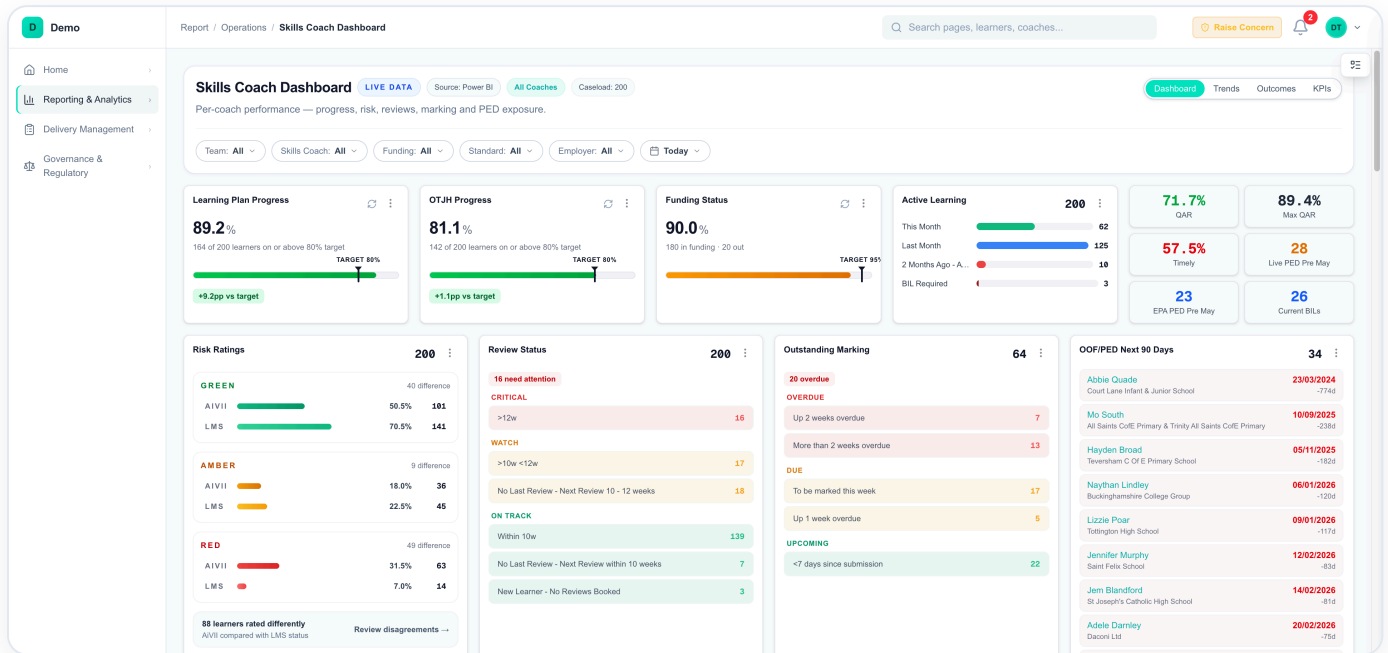
Prep the team 1:1 agenda from the data.

Filter Daily Ops to the team. Each coach's row shows their Outstanding Marking, current caseload risk distribution, review status. Open the right column for each: copy 2-3 specific points into the 1:1 agenda. By the time the meeting starts, you've got **concrete data-backed coaching** for every coach instead of generic check-ins.

SKILLS COACH DASHBOARD

Every coach's home. Caseload, risk, marking, reviews.

Skills Coach Dashboard is each Skills Coach's personal home: their caseload performance, risk movement, outstanding marking, upcoming reviews, BILs and gateways, all scoped to their assigned learners. Quality and Operations roles can switch coach to view any team member's page, with full historical Trends and Outcomes tabs.



01 WHAT IT ANSWERS

- What's my caseload's QAR position and ceiling potential?
- Who's about to reach gateway in the next 90 days?
- Who is currently on Break in Learning?
- Where am I behind: on marking, on reviews?
- How do my outcomes compare across cohorts and programmes?

02 KEY METRICS SHOWN

- **QAR %** caseload achievement rate
- **Timely Completion** 12-month rolling rate
- **EPA PED Pre May** purple count, clickable
- **Progress Rates** LP % + OTJH %
- **LMS Risk Rating** comparison from source
- **Active Learning** status breakdown bar
- **Outstanding Marking** table by marking status

14 WIDGETS

- **Max QAR %** ceiling if in-progress achieve
- **Live PED Pre May** amber count, clickable
- **Current BILs** learners on Break in Learning
- **AiVII Risk Rating** RAG distribution stacked
- **Funding Status** donut: In / Out of funding
- **Review Status** table by status
- **OOF / PED Next 90 Days + Progress Reviews** sortable lists

03 DRILL-THROUGHS

- Click PED Pre May / EPA PED → named gateway-risk learners
- Click BIL count → current Break-in-Learning list
- Click a risk band → **Risk Centre** filtered to that band for this coach
- Click Funding segment → In / Out of funding learners
- Click Review or Marking status → named learners in that bucket

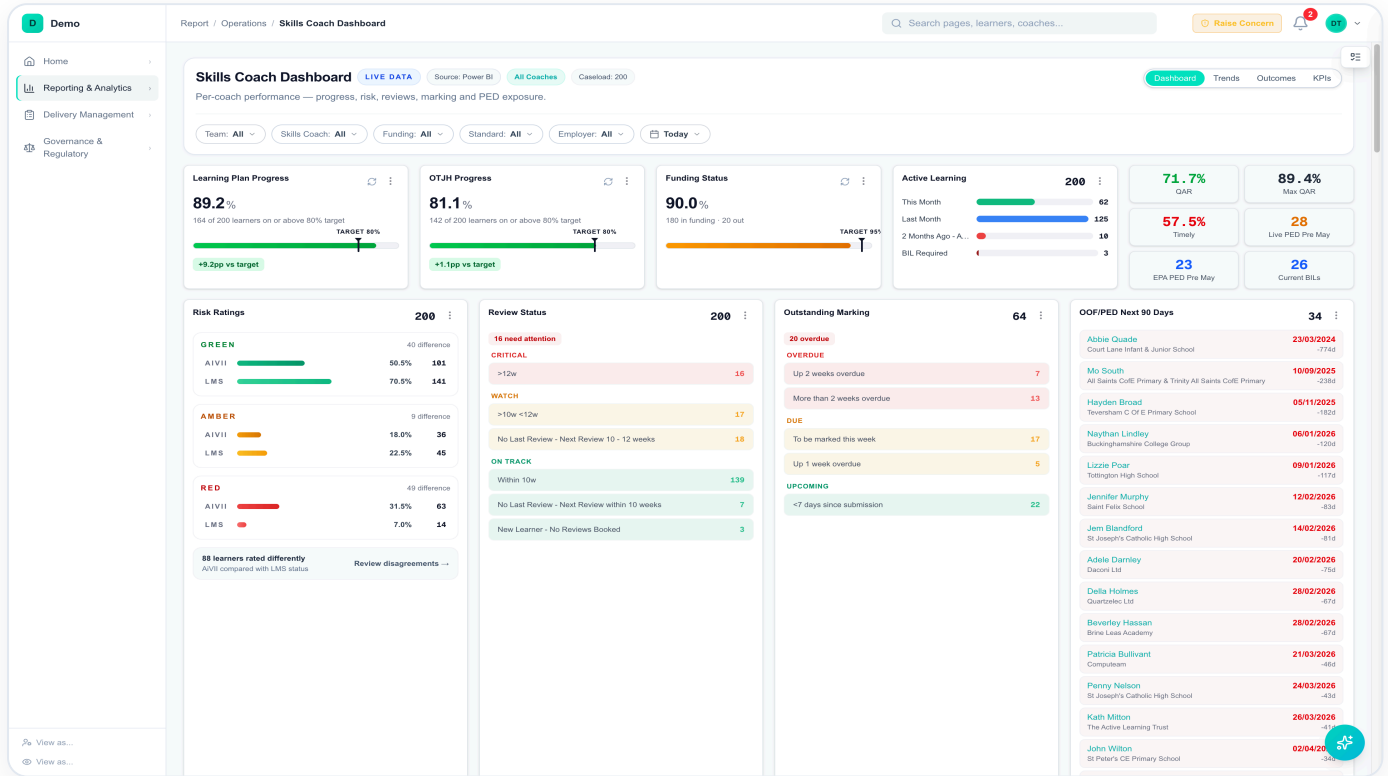
04 TABS & SCOPING

- **Default scope:** logged-in coach for Skills Coach role; switchable for Quality/Ops roles
- **Tabs:** Dashboard · Trends (historical, when available) · Outcomes (cohort/programme) · KPIs
- **Trends tab** streams historical movement; **Outcomes** shows cohort and programme outcomes side-by-side
- **KPI tab** tracks personal targets where configured

SKILLS COACH DASHBOARD · IN PRACTICE

A coach's Monday morning. Caseload at a glance.

How a Skills Coach starts their week from one screen. Their personal home, scoped to their assigned learners, surfacing the work that needs doing this week.



Live PED Pre May / EPA PED
Gateway-risk learners flagged in amber and purple: what to chase this month.

Outstanding Marking
Today's queue, with oldest items flagged red.

Review Status
Overdue + upcoming reviews; click a row to launch AI Review Prep.

Risk Ratings
Caseload split by Critical / Watch / Scheduled: scope today's priorities.

SKILLS COACH *Monday, 8:00am*

Three priority learners. The week, planned.

Open Skills Coach Dashboard. **Live PED Pre May** shows 4 amber tiles: click, see who needs gateway action this month. **Outstanding Marking** shows 8 items, 2 over 5 days old: mark first thing. **Reviews due:** one overdue, click to open AI Review Prep brief. By 8:20am you've got the week's priorities and a structured prep brief for your first 1:1 today.

QUALITY MANAGER *Monthly team review*

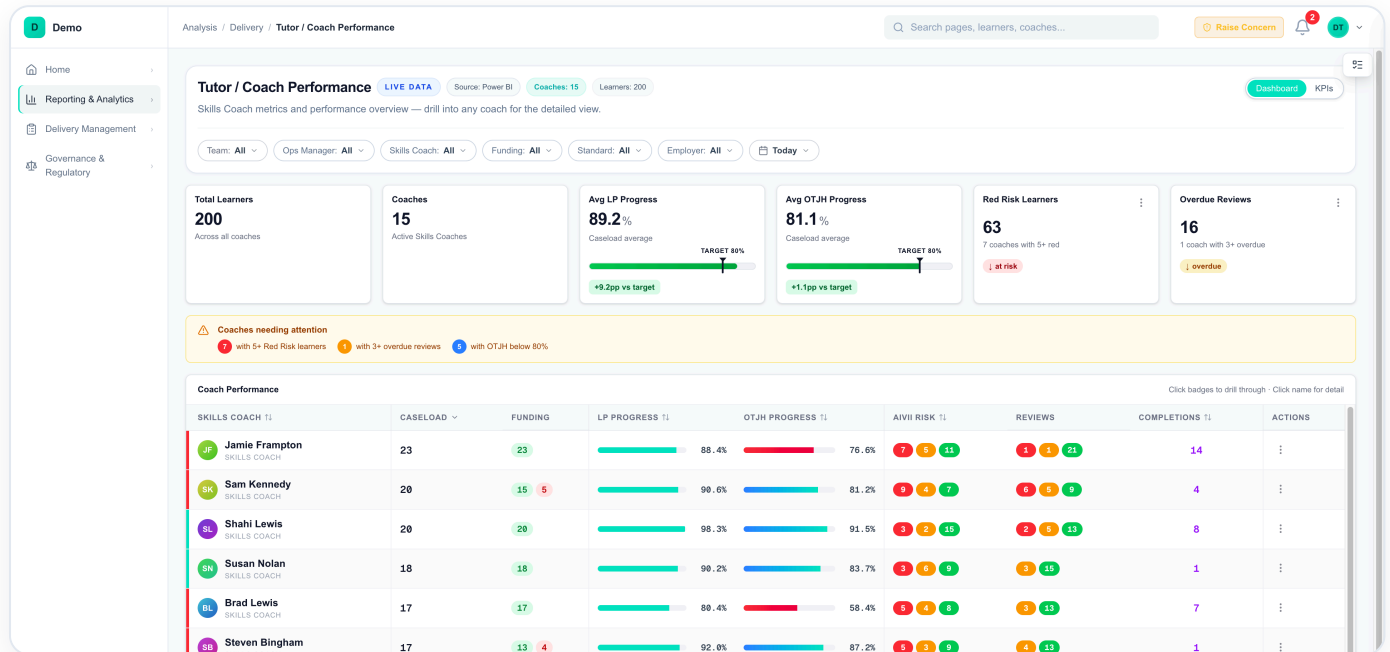
Compare outcomes across your coaches.

Open Skills Coach Dashboard, switch coach. Compare **Trends** tab across 3 coaches in your team: one's LP Progress is consistently 5pp behind. Open their **Outcomes** tab: programme-mix similar to peers, so the gap isn't learner-dependent. Concrete data for the next coaching conversation.

COACH PERFORMANCE

Every coach, every metric, one table.

A unified view of your coaching team. Coach Performance shows how each coach's caseload is doing right now: risk distribution, review status, OTJH and Learning Plan progress, funding, upcoming completions. Click any coach for the full caseload breakdown.



01 WHAT IT ANSWERS

- Which coaches need attention right now?
- Who has the highest risk caseload?
- Who has overdue reviews and low OTJH?
- How does each coach's caseload compare on funding mix?
- Who's carrying the most upcoming completions?

02 KEY METRICS SHOWN

- **Total Learners** org-wide count
- **Avg LP Progress** team average
- **Red Risk Learners** team total
- **Coaches Needing Attention** High Risk / Overdue / Low OTJH triggers
- **Coaches** active count
- **Avg OTJH Progress** team average
- **Overdue Reviews** team total
- **Per-coach row** caseload, funding mix, LP/OTJH, risk badges, reviews, completions

03 DRILL-THROUGHS

- Click a coach name → Coach Detail with full caseload
- Click caseload count → all learners under that coach
- Click a Funding badge → In / Out of Funding learners
- Click Risk badges → Risk Centre filtered to band
- Expand a row → per-Standard caseload breakdown

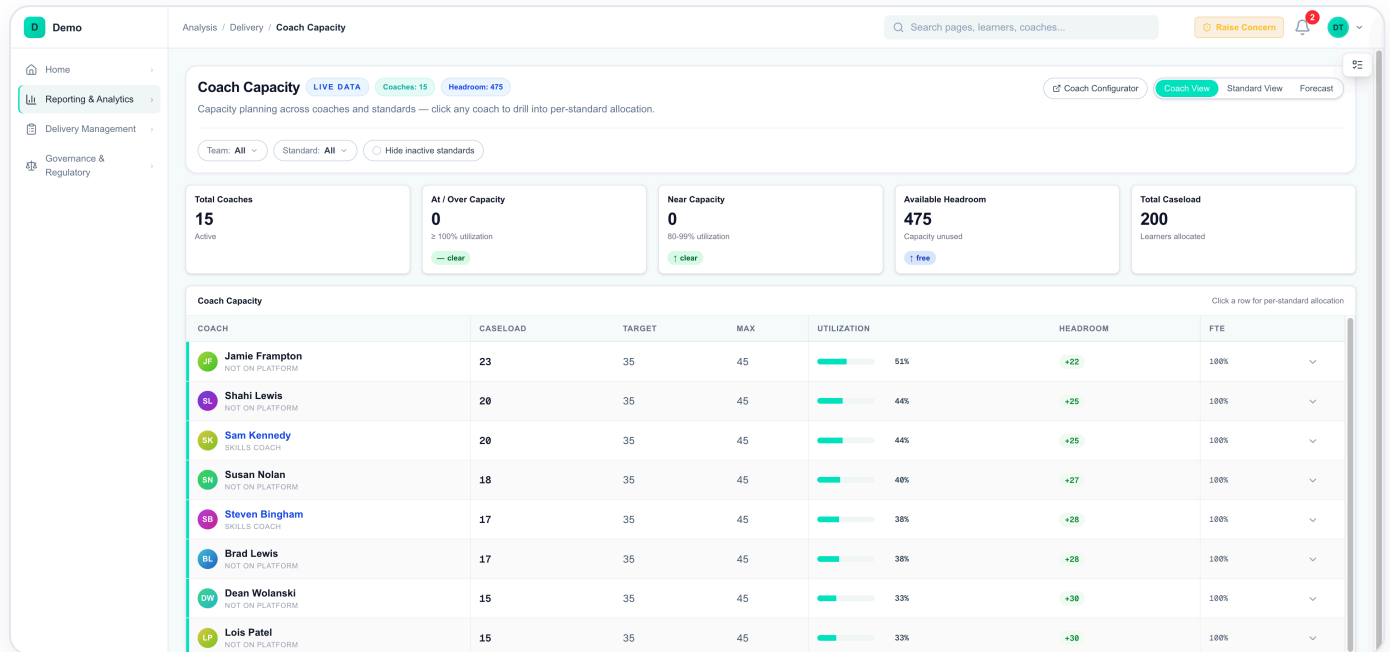
04 FILTERS & SCOPING

- Org-wide view by default for Senior Leaders, Quality and Ops Leaders
- Filter chip row scopes the table by Team, Standard, Funding, Employer
- Pair with Coach Capacity (next slide) for the headroom view

COACH CAPACITY

Headroom now. Recruitment signal next.

Capacity planning across coaches and Standards. See who's at, near or over caseload right now, edit a 12-month forecast that nets starts, withdrawals and gateways into projected caseload, and surface where you need to recruit before the gap bites.



01 WHAT IT ANSWERS

- Who's at or over capacity right now?
- Where do we have unused headroom?
- By Standard, do we have qualified coaches matching learner demand?
- What does the forecast caseload look like over 12 months?
- Which Standards are flashing recruitment signals?

02 KEY METRICS SHOWN

- **Total Coaches** active count
- **At / Over Capacity** red-zone count, ≥ 100% utilisation
- **Near Capacity** amber count, 80–99% utilisation
- **Available Headroom** spare caseload across the team
- **Total Caseload** learners allocated org-wide
- **Per-coach row** caseload, target, max, utilisation %, headroom, FTE

03 THREE VIEWS

- **Coach View**, utilisation per coach against target and max
- **Standard View**, qualified coaches vs learner demand by Standard
- **Forecast**, editable 12-month projection netting starts, withdrawals and gateways

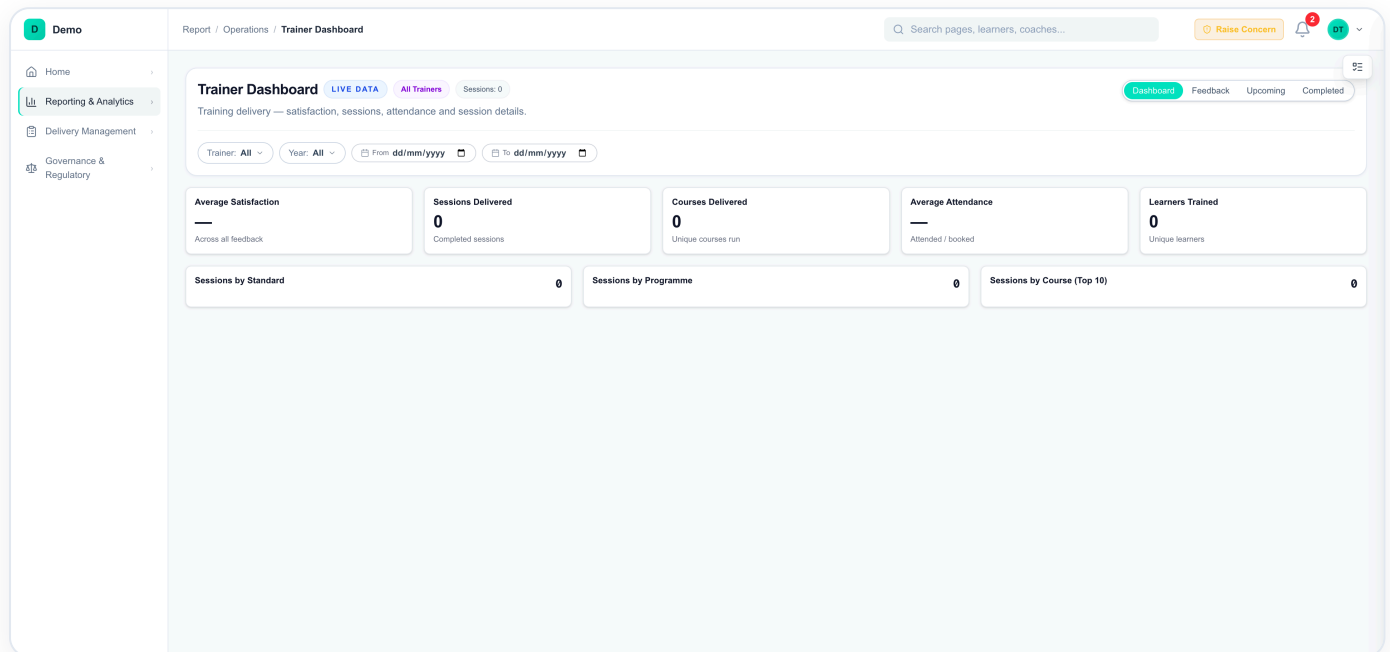
04 DRILL-THROUGHS

- Click a coach row → per-Standard caseload allocation
- Coach Configurator opens the assignment panel
- Recruit Signal banner highlights Standards with capacity gaps
- Forecast inputs editable: changes flow into Capacity Gap automatically

TRAINER DASHBOARD

Sessions, attendance, feedback. The trainer's view.

Trainer Dashboard is each Trainer's personal view of their session delivery: average satisfaction, sessions and courses delivered, attendance rate, and learners trained, plus per-course feedback on every question. AI Training Matrix briefings (ControlAI) summarise each completed session so trainers walk into the next one prepped on what worked and what didn't.



01 WHAT IT ANSWERS

- What sessions am I delivering this week / month?
- How is each course rating: overall and per question?
- How does attendance compare across courses and Standards?
- Which sessions have I delivered, and how did learners feedback?
- Which sessions have an AI training matrix briefing ready?

02 KEY METRICS SHOWN

- **Average Satisfaction** star rating across sessions
- **Courses Delivered** distinct courses
- **Learners Trained** unique learners
- **Feedback by Question** per-question average + responses
- **Completed Sessions** attendance, rating, AI briefing icon

5 KPIS + 4 TABS

- **Sessions Delivered** count in date range
- **Average Attendance** % across all sessions
- **Sessions by Standard / Programme / Course** 3 distribution charts
- **Upcoming Sessions** expandable to learner list
- **AI Training Matrix** per-session briefing (ControlAI)

03 DRILL-THROUGHS

- Expand an Upcoming session → Learner table with attendance status
- Expand a Completed session → Learner attendance + feedback ratings
- Click AI Briefing icon → **AI Training Matrix** for that session
- Click a chart segment → sessions filtered to that Standard / Programme / Course

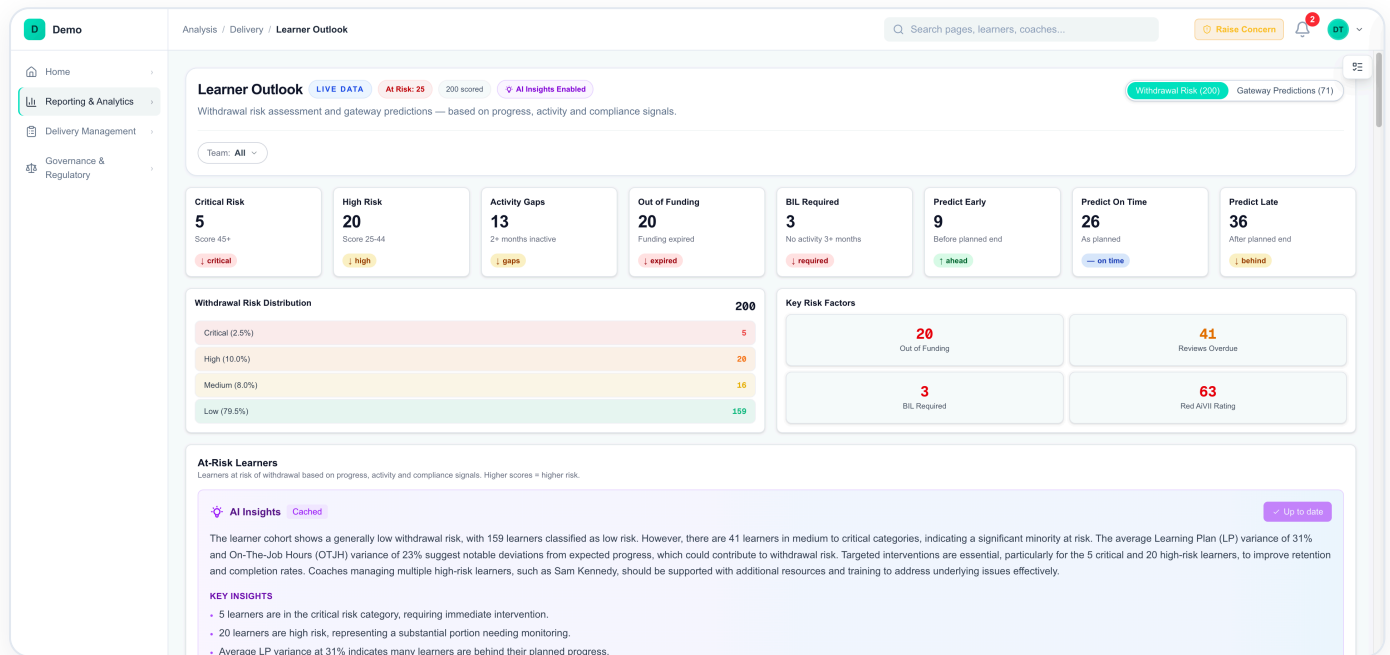
04 FILTERS & SCOPING

- **Trainer** dropdown: switchable for Quality / Ops roles
- **Date From / Date To** for session range
- **Apprenticeship Year** (Aug-Jul)
- **Tabs:** Dashboard · Feedback · Upcoming · Completed
- Pairs with **Training Module** (DM > Operations) for end-to-end session management

LEARNER OUTLOOK

Withdrawal risk, predicted. With the WHY explained.

Learner Outlook is the prediction-led view of where your cohort is heading. **Withdrawal Risk** distributes learners across Critical / High / Medium / Low and surfaces the priority intervention list. **Early Gateway** projects predicted gateway dates with variance against planned end. With ControlAI, AI Insights summarise the priority population and a per-learner explanation modal shows specific risk factors and recommended actions.



01 WHAT IT ANSWERS

- Who is at Critical / High / Medium / Low withdrawal risk?
- Which learners have activity gaps or are out of funding?
- Who is predicted to gateway early, on time, or late?
- For each high-risk learner, what specifically is wrong and what should I do?
- Which 5–10 learners need priority intervention this week?

03 AI FEATURES (CONTROLAI)

- **AI Insights Panel:** auto-loads cached insights; one refresh per 24h
- **Priority Learners:** pills the AI flags for this week
- **Per-learner Explanation Modal:** risk factors as numbered list, recommended actions, current metrics, link to Learner Detail
- **Cached responses** with explicit cache indicator so users see when insights last refreshed

02 KEY METRICS SHOWN

- **Critical Risk** score 45+
- **Activity Gaps** 2+ months inactive
- **BIL Required** 3+ months no activity
- **Withdrawal Risk Distribution** stacked bar Critical→Low
- **Withdrawal Risk table** per-learner score, LP / OTJH var, activity
- **AI Insights Panel** summary + key insights + priority pills

10 WIDGETS + AI PANELS

- **High Risk** score 25–44
- **Out of Funding** past PED, no funding
- **Predict Early / On Time / Late** 3 gateway prediction tiles
- **Key Risk Factors** Out of Funding / Reviews / BIL / Red AiVII
- **Early Gateway table** Planned vs Predicted, readiness
- **AI Explanation Modal** risk factors + recommended actions

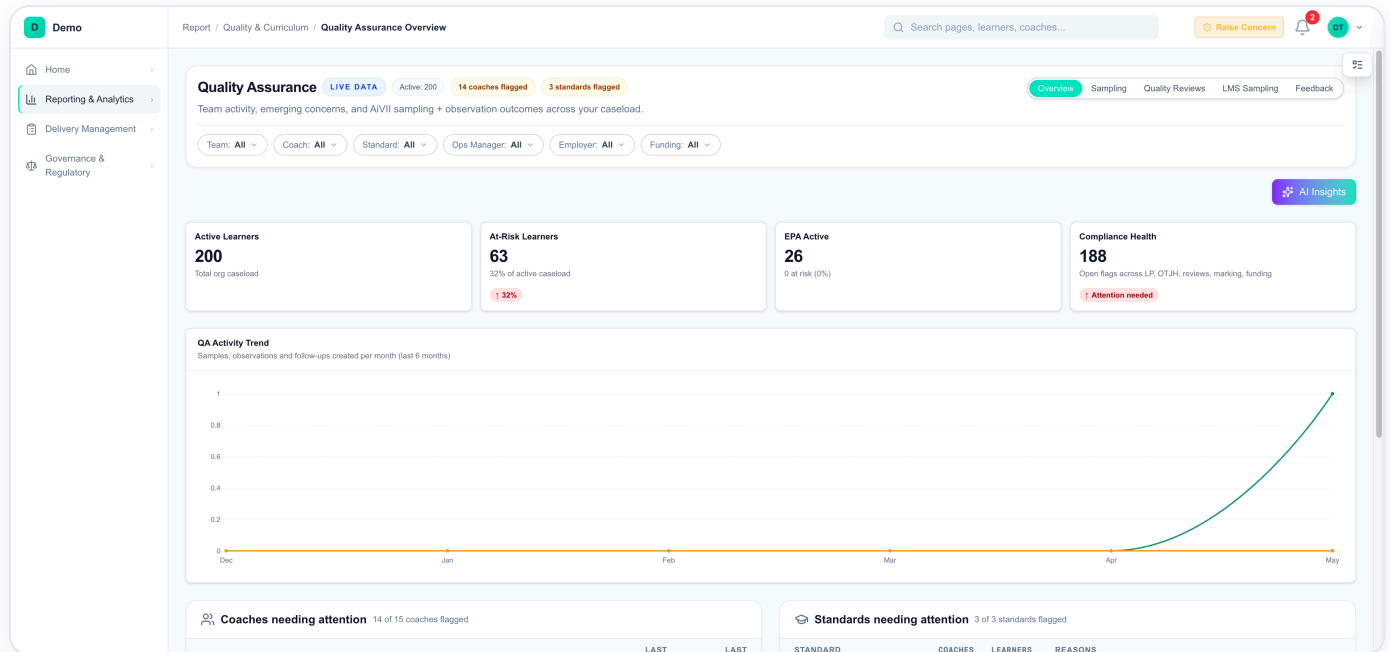
04 FILTERS & SCOPING

- **Risk Level · Coach · Employer · Standard · Ops Manager** on the table
- **Tabs:** Withdrawal Risk · Early Gateway (Predictions)
- Click a learner name → **Learner Detail (360)**
- Click AI icon on a row → that learner’s explanation modal
- Sortable columns; expandable rows for full context

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

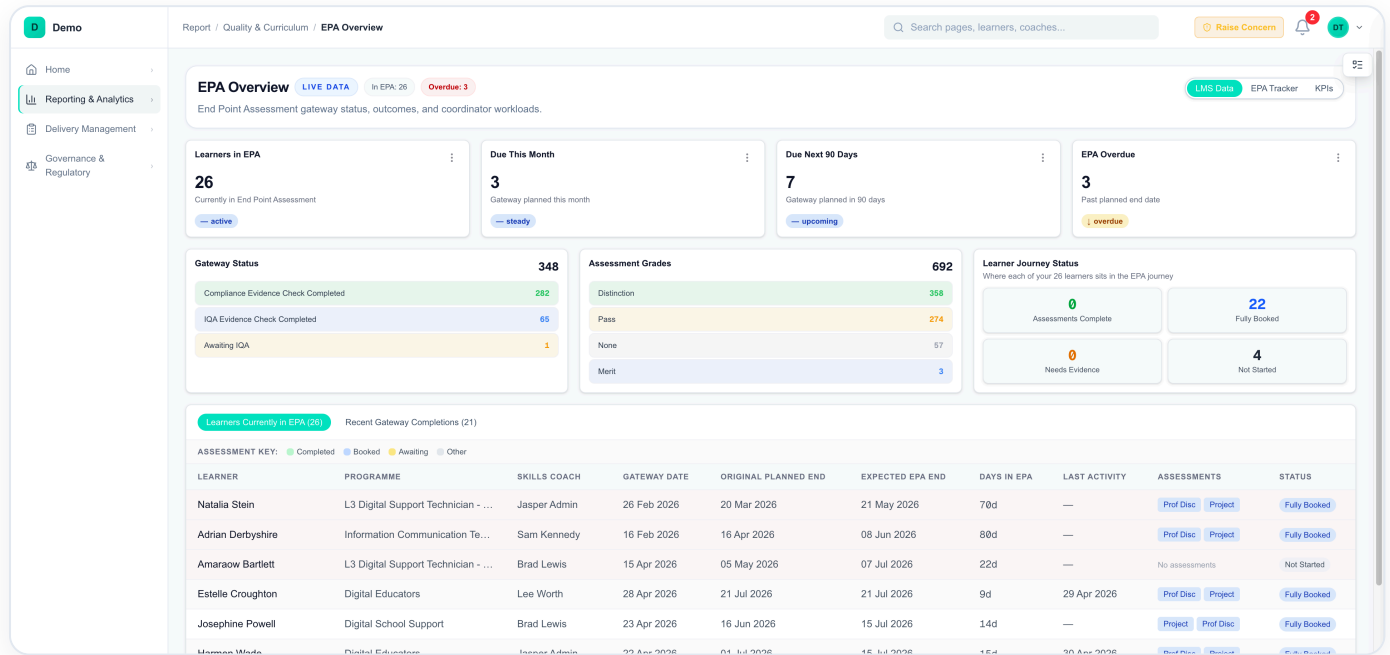
04 FILTERS & SCOPING

- **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

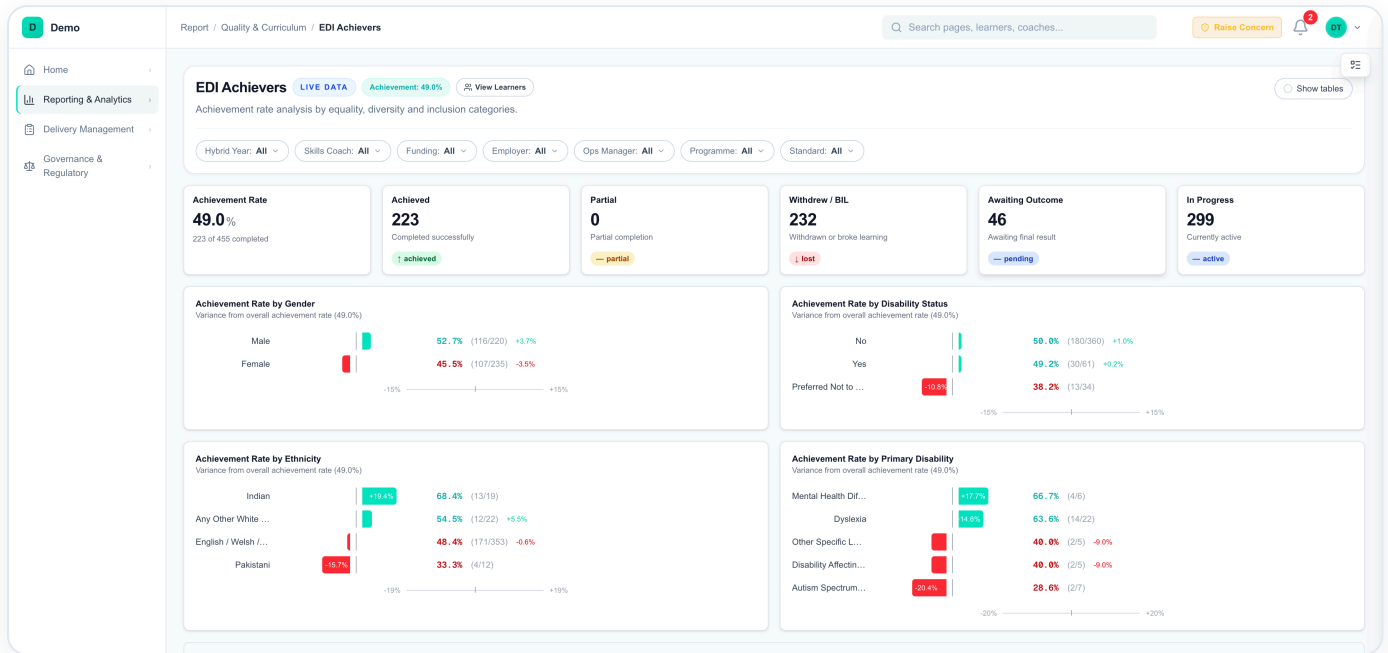
04 TABS & SCOPING

- **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

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

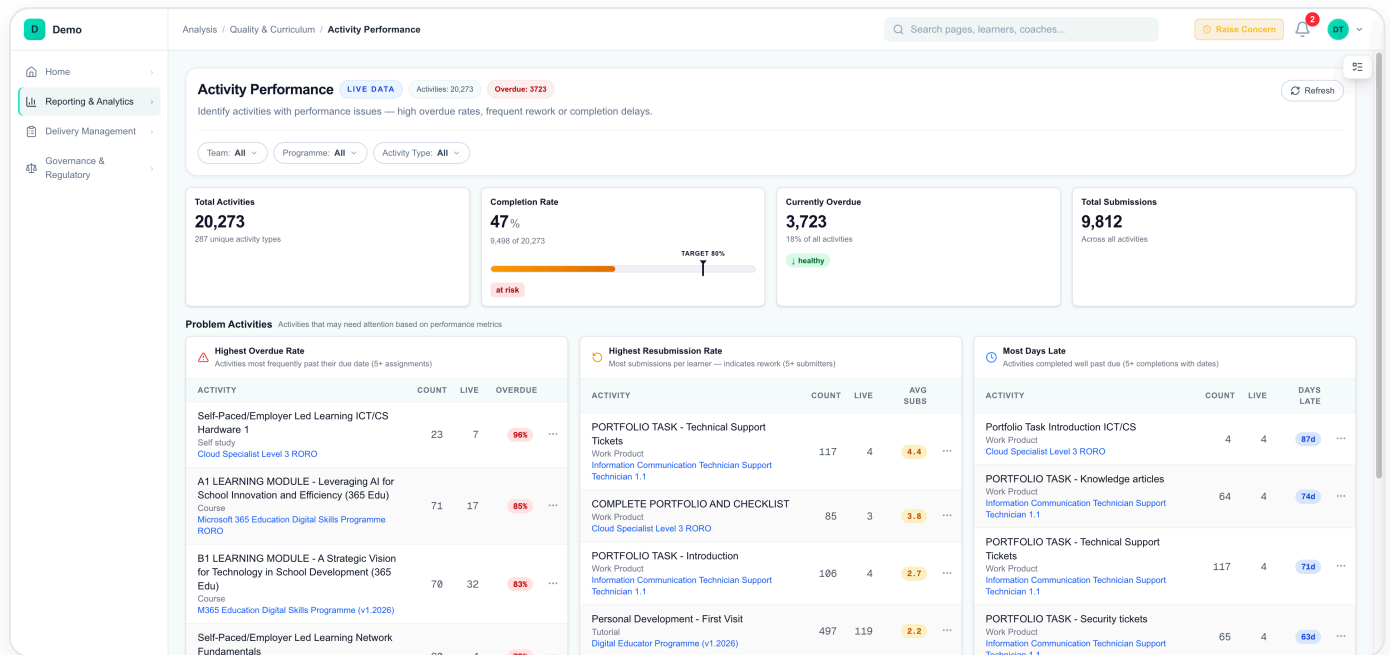
04 FILTERS & SCOPING

- **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

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

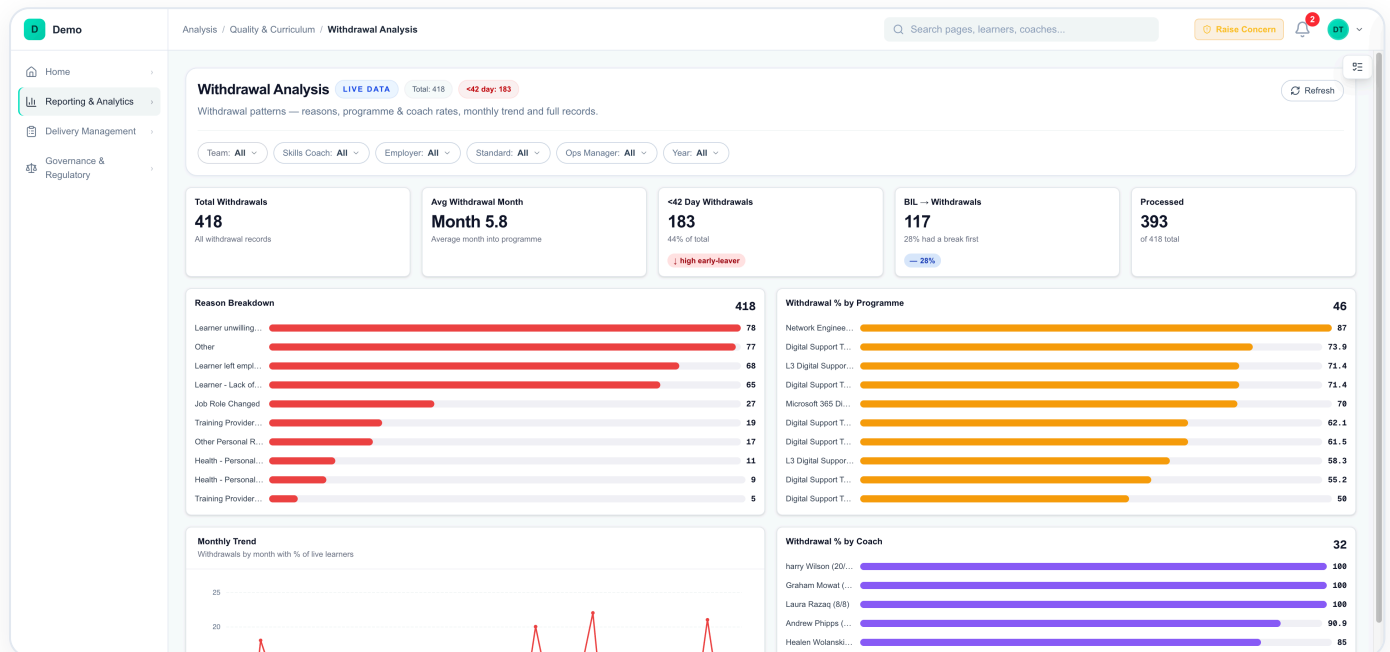
04 FILTERS & SCOPING

- **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

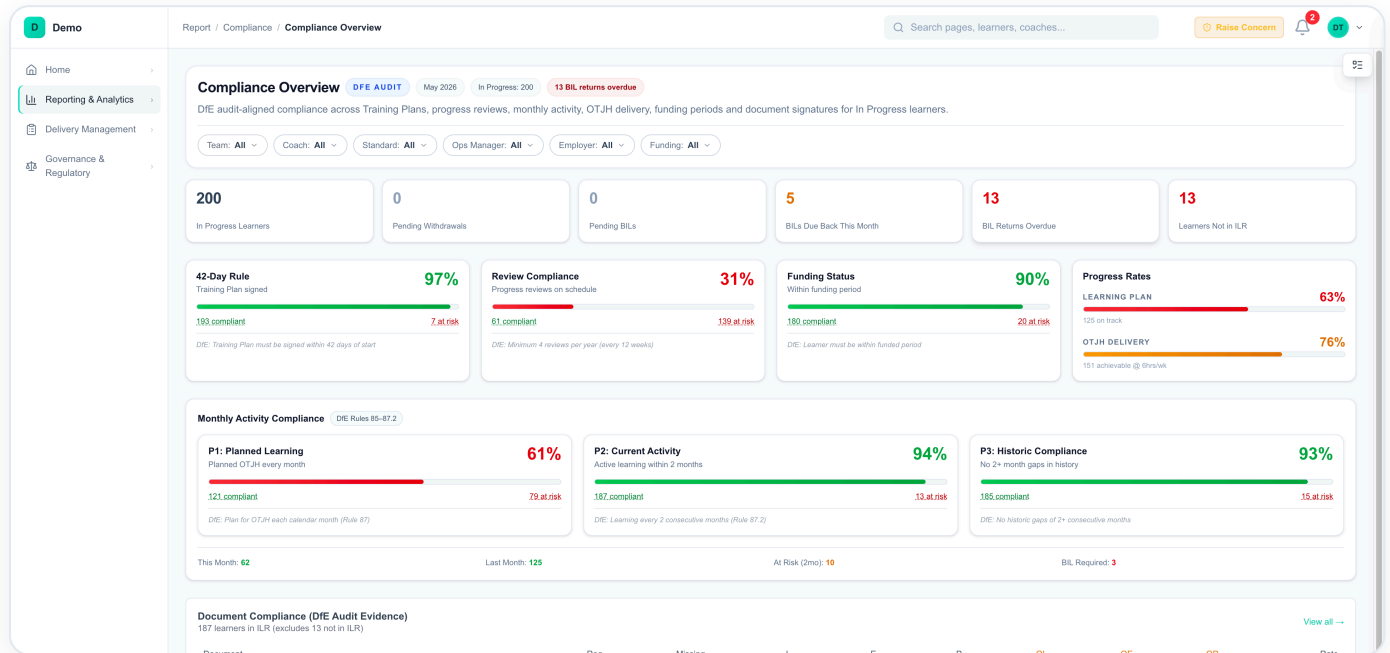
04 FILTERS & SCOPING

- 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

COMPLIANCE & ILR

Audit-ready, every day. Aligned to DfE rules.

The compliance hub for DfE audit readiness. Audit cards align directly to DfE rules: 42-day Training Plan, 12-week Reviews, OTJH delivery, monthly activity coverage, all with RAG status driven by 90/70 thresholds. Drill into Document Compliance for missing/offline signatures by stakeholder. ILR Exclusions and per-learner Compliance pages complete the audit trail.



01 WHAT IT ANSWERS

- Are we 42-day compliant? 12-week review compliant?
- What's our OTJH delivery vs plan, and which learners are off track?
- Where are documents missing: and from whom?
- Who's on the ILR exclusions list and why?
- Per learner, what compliance gaps remain?

02 KEY METRICS SHOWN

- **42-Day Training Plan Compliance** beyond 42 days, RAG
- **Monthly Activity (Part 1)** planned OTJH coverage
- **Monthly Activity (Part 3)** historic gaps
- **Learning Progress On Track** % on plan
- **Pending Withdrawals + BILs** 2 cards, action queue
- **Document Compliance table** Missing + Offline per stakeholder

12+ DfE-ALIGNED CARDS

- **12-Week Review Compliance** RAG against rule
- **Monthly Activity (Part 2)** active learning this month
- **OTJH Delivery On Track** % on plan
- **Funding Status** In / Out of funding
- **BILs Due Back / Return Overdue** 2 cards, return tracking
- **ILR Exclusions + Learner Compliance** named lists with reasons

03 DRILL-THROUGHS

- Click any compliance card → at-risk learners
- Document Compliance row → missing signatures by document
- ILR Exclusions → learners excluded with reason
- Learner Compliance row → per-learner missing/offline doc detail

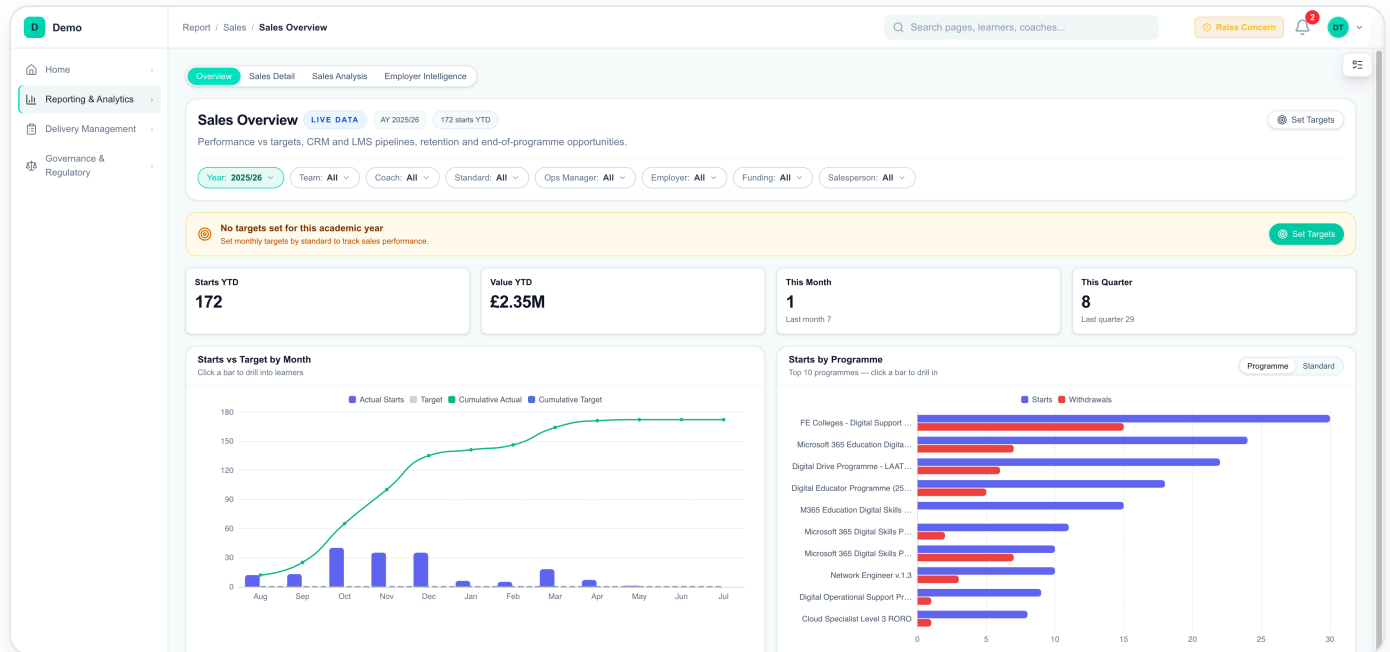
04 FILTERS & SCOPING

- **Skills Coach · Employer · Status · ILR** filters
- DfE rule reference shown on each card for audit traceability
- RAG thresholds tuned to typical Ofsted scrutiny (90% / 70% / below)
- Sortable columns on every table for fast triage

SALES ANALYTICS

Pipeline. Starts. Year-on-year.

Three views of your apprenticeship sales pipeline and outcomes. **Sales Overview** shows YTD position with starts vs target and live pipeline by month. **Sales Detail** drills to named-learner level: who started where, on what programme. **Sales Analysis** compares this year vs previous on starts, value and withdrawal rate.



01 WHAT IT ANSWERS

- How many starts are we behind / ahead of target this year?
- What's the live pipeline this month and over 3 months?
- Who's started where, on what programme, with what employer?
- How does this year compare to last year by month?
- What's our retention rate on early withdrawals?

02 KEY METRICS SHOWN

- **YTD Starts** vs target
- **Pipeline This Month / M+1 / M+2 / M+3** 4 forward-looking cards
- **Retention Rate** % with early withdrawal count
- **Total Starts / Value** Detail view summary
- **Sales Pipeline by Status** 14-status funnel chart
- **YoY Enrolments / Programme Value / Withdrawal Rate** 3 multi-year line charts

15+ ACROSS 3 VIEWS

- **YTD Value** vs target
- **Total Pipeline / Stale Pipeline** 2 cards
- **Approaching End** Practical & EPA within 30/60/90d
- **Unique Programmes / Employers / Standards** 3 cards
- **Starts by Programme / Employer / Standard** 3 horizontal bars
- **Top Employers (YoY)** starts and value sortable tables

03 DRILL-THROUGHS

- Click any month bar → learners starting that month
- Click a Standard → learners on that Standard
- Click an Employer → learners with that employer
- Pipeline status → opportunities at that stage
- Click a learner row → **Learner Detail (360)**

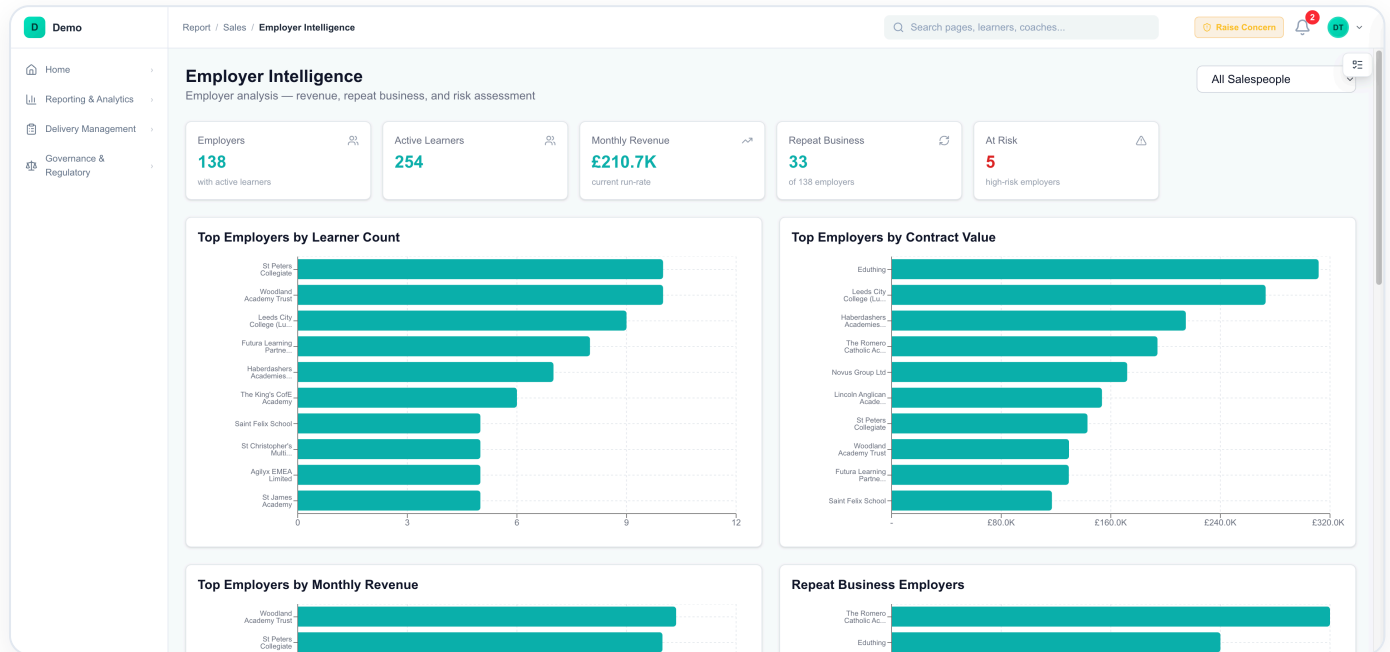
04 FILTERS & SCOPING

- **Skills Coach · Standards · Ops Manager · Employer · Funding**
- **Year selection** for YoY comparison
- **Custom employer multi-select** for client-specific analysis
- Optional trend lines on multi-year charts

EMPLOYER INTELLIGENCE

Your employer base. Ranked, scored, sortable.

Employer Intelligence ranks your employer base by revenue, withdrawal rate and risk score: surfacing repeat-business opportunities, growing relationships and the employers driving most of the leak. Risk score combines withdrawal history, monthly revenue and contract value into a sortable column you can act on.



01 WHAT IT ANSWERS

- Which employers drive most of our revenue?
- Where are we losing employers: declining cohort sizes?
- Which employers are repeat business?
- Who's at risk: high withdrawals, declining contracts?
- Who has growing cohorts we should invest in?

02 KEY METRICS SHOWN

- **Total Employers** distinct count
- **Total Monthly Revenue** recurring funding
- **Repeat Business Count** multi-cohort employers
- **Active / Total / Withdrawn Learners** 3 columns per employer
- **Programmes (tags)** programmes delivered
- **Cohorts** Growing / Declining / Stable trend

6 KPIS + 12-COL TABLE

- **Total Active Learners** across all employers
- **Total Earned Revenue** recognised to date
- **At Risk Count** flagged employers
- **Monthly Revenue / Contract Value / Earned** 3 financial columns
- **Withdrawal Rate %** leak indicator
- **Risk Score** composite + flags badge

03 DRILL-THROUGHS

- Click an employer name → **Employer Detail (360)**
- Click a Risk Score → flagged learners contributing
- Click a Programme tag → learners on that programme with this employer
- Click a cohort trend badge → cohort detail history

04 FILTERS & SCOPING

- **Search by name** · Risk filter (High / Medium)
- **Repeat Business** filter
- URL params: **salesperson / coach / standard / ops manager / employer / funding / team**
- Sortable on Active Learners / Revenue / Withdrawal Rate / Risk Score

APPLICANT OVERVIEW

The pre-enrolment funnel. Who's where, what's missing.

Applicant Overview is the pre-enrolment compliance and progress view: every applicant in the funnel with their sign-up status, App Summary, Commitment, ALS, Funding Statement, and signature Req status. The single screen Quality and Operations need to spot drop-offs and incomplete commitments before learners go live.

Applicant Overview LIVE DATA 1,033 applicants Excl. archived

Application progress, compliance status and signature tracking for in-flight applicants.

Total 1,033 applicants in scope

Not Yet Invited 58 awaiting invite

Awaiting Check 309 completed but unchecked

Missing Training Plan 76 not yet completed

Status: Excl. Archived | Search learner... | Programme: All | Employer: All | Standard: All | Residency: All

Invited: All | Summary: All | Training Plan: All | ALS: All | App. Signed: All | Emp. Signed: All | Sign-up: dd/mm/yyyy | dd/mm/yyyy

LEGEND: Complete, completed & checked, Check Req, completed, requires check, Incomplete, not completed

LEARNER	PROGRAMME	EMPLOYER	STATUS	INVITED	APP SUMMARY	TRAINING PLAN	ALS	FUNDING	NEW ROLE	SIGN UP	APP. SIGNED	EMP. SIGNED
A Woods	FE Colleges - Digital Support Tech...	Leeds City College (Lumin...	Signed Up	Yes	Complete	Complete	Complete	Complete	No	31 Oct 25	Yes	No
Abbie Latham-Johnstone	Digital Support Technician (v1.1) E...	KEVI Five Ways School	Signed Up	Yes	Check Req	Check Req	Check Req	Check Req	No	21 Apr 23	Yes	Yes
Abbie Quade	Digital Support Technician (v1.1) E...	Court Lane Infant & Junior...	Completed	Yes	Complete	Check Req	Complete	Complete	No	05 Jan 23	Yes	Yes
Abbie Reddington	Digital Support Technician (Educat...	The Brooke Western Trust	Completed	Yes	Complete	Complete	Complete	Complete	Yes	21 Mar 22	Yes	Yes
Abby Broad	L3 Digital Support Technician - Ed...	Grace Academy Coventry	Signed Up	No	Complete	Complete	Complete	Complete	No	17 Apr 24	Yes	No
Abby Burlace	Network Engineer (2021)New	Novus Group Ltd	Completed	Yes	Complete	Check Req	Complete	Complete	No	05 May 23	Yes	Yes
Abby Clifton	Digital Support Technician (v1.1) E...	St John Vianney Catholic ...	Signed Up	Yes	Check Req	Check Req	Check Req	Check Req	No	29 Mar 23	Yes	Yes
Abby Courtman	Microsoft 365 Digital Skills Progra...	Coventry & Warwickshire ...	Signed Up	Yes	Complete	Complete	Complete	Complete	No	30 Jul 25	Yes	No
Abel Kaljouw	Information Communication Techni...	CompuLearn	Completed	Yes	Complete	Complete	Complete	Complete	Yes	19 May 22	Yes	Yes
Abigail Rumby	L3 Digital Support Technician - Ed...	Ruskington Chestnut Stre...	Signed Up	Yes	Complete	Complete	Complete	Complete	No	03 Jun 24	Yes	No
Adam Castella-Gonzalez	Digital Support Technician (Profes...	St John Vianney Catholic ...	Signed Up	Yes	Complete	Complete	Complete	Complete	No	20 Sept 23	Yes	Yes
Adam Charlton	Digital Support Technician (v1.1) C...	RoarTech Ltd	Completed	Yes	Complete	Complete	Complete	Complete	No	20 Apr 23	Yes	Yes
Adele Darnley	Network Engineer v 1.2	Daocni Ltd	Signed Up	Yes	Complete	Complete	Complete	Complete	No	11 Sept 24	Yes	No

01 WHAT IT ANSWERS

- Who's in our pre-enrolment funnel right now?
- Which applicants are missing App Summary / Commitment / ALS / Funding Statement?
- Who's been invited but not signed?
- What's the new-job-role flag distribution?
- Where are we losing applicants between sign-up and live?

02 KEY METRICS SHOWN

- **Total Applicants** in active funnel
- **Status** funnel stage per applicant
- **App Summary / Commitment** Completed / Checked status
- **New Job Role flag** Yes / No
- **Employer Signed / Applicant Signed** 2 columns, signature status
- **Per-stage completion counts** summary across stages
- **Invited** Yes / No
- **ALS / Funding Statement** Completed / Checked status
- **Sign-Up Date** funnel timing
- **Sortable on every column** Quality / Ops fast triage

03 DRILL-THROUGHS

- Click an applicant → Applicant Detail with full sign-up history
- Click a status segment → applicants at that stage
- Click a missing-document column → applicants needing that document

04 FILTERS & SCOPING

- **Status** · **Programme** · **Employer** · **Residency** · **Standard** (multi-select)
- **Invited / App Summary / Commitment / ALS** Yes/No/All
- **Employer Signed / Applicant Signed** Yes/No/All
- **Sign-Up Date** from / to range

FUNDING OVERVIEW · HEADLINER

Every pound of funding. Actual, forecast, recoverable.

Funding Overview is the finance hub. The screenshot below shows the **Overview** tab: a month-by-month matrix of actual revenue across OPPs, Starts, Completions, ALS, Incentives and Payback, with a TOTAL column for the running year position. Four further tabs sit on the same dashboard for forecast, historical, deep-dive insights and ROI.

The screenshot shows the 'Funding Overview' dashboard with a navigation sidebar on the left and a main data table. The table has columns for months from August to July and a 'TOTAL' column. Rows are categorized by funding type: OPPS, STARTS, COMPLETIONS, ALS, INCENTIVES, and FUNDING PAYBACK. Each row contains numerical values for each month and the total. A 'LIVE DATA' badge is visible in the top right of the table area.

FUNDING TYPE	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	TOTAL
OPPS	148,305	160,729	174,243	189,116	201,606	217,074	202,216	180,764	183,497	172,133	160,875	140,366	2,130,925
Break Returners This Month	4,343	5,044	12,532	3,089	2,578	8,935	1,793		1,040				39,353
Functional Skills OPP (Excluding Starts this Month)	1,436	1,496	1,557	1,315	1,255	905	808	829	768	768	527	382	12,047
OPP (Excluding Starts this Month)	142,527	154,189	160,154	184,713	197,774	207,234	199,614	179,935	181,689	171,364	160,348	139,984	2,079,525
STARTS	10,017	11,008	34,155	27,833	28,385	5,181	3,192	16,441	5,099	867			142,176
New Functional Skills Starts This Month	60	60				145	201	121					587
New Starts This Month	9,956	10,947	34,155	27,833	28,385	5,036	2,991	16,320	5,099	867			141,588
COMPLETIONS	26,395	14,062	17,360	31,626	17,492	21,064	13,084	30,630	22,346	15,716	50,230	44,560	304,565
Actual Completion Payments	26,395	14,062	17,360	31,626	17,492	21,064	13,084	30,630	22,346				194,059
Planned Completion Payments										15,716	50,230	44,560	110,506
Planned Completion Payments (Forecast)										15,716	50,230	44,560	110,506
ALS													
INCENTIVES													
Employer Incentives													
Provider Incentives													
FUNDING PAYBACK	-10,413	-10,260	-3,991	-4,044	-7,422	-17,538	-8,042	-9,216	-4,223				-75,149
Functional Skills Payback	-4,965	-2,673											-7,638
OPP Payback	-5,448	-7,587	-3,991	-4,044	-7,422	-17,538	-8,042	-9,216	-4,223				-67,511
TOTALS	174,304	175,539	221,767	244,530	240,061	225,781	210,450	218,619	206,718	188,715	211,105	184,926	2,502,516

01 WHAT THE OVERVIEW TAB ANSWERS

- Where's our funding revenue right now, by month?
- How does each funding type compare across the year?
- What's our running total this academic year?
- Where are we against last year at this point?

02 WHAT'S ON THIS SCREEN

- **Funding Matrix** 12-month actual revenue grid
- **TOTAL column** running year totals per row
- **5-tab strip** Overview, AiVII Forecast, Historical, Insights, ROI
- **Cell drill-through** click any cell for the contributing learners
- **Funding Type rows** OPPs, Starts, Completions, ALS, Incentives, Payback
- **Filter chips** Year, ILR, Team, Coach, Standard, Ops Manager, Employer, Funding
- **Live data badge** refreshes from MIS automatically
- **Row drill-through** click a row label for that funding type detail

03 THE OTHER 4 TABS (SEPARATE SLIDES)

- **AiVII Forecast**, projected months added to the matrix
- **Historical Analysis**, 4 years of starts, completions, withdrawals
- **Finance Insights**, revenue trajectory, learner flow, portfolio risk
- **Return on Investment**, ESFA-mapped recoveries (Past PED, At-Risk OPPs, Gateway Timely %, Manual Data Work)

04 FILTERS & SCOPING

- Filter chip row scopes every tab on this dashboard
- Skills Coach, Standard, Ops Manager, Employer, Funding Type
- Year selector switches academic year
- Org-wide view by default for Senior Leaders and Finance

FUNDING OVERVIEW · IN PRACTICE

Board prep, audit prep, ROI. In one place.

How a Finance Director uses Funding Overview through the year: board reporting, ESFA audit prep, monthly forecast meetings, and the ROI bottom-line for renewal conversations.

FUNDING TYPE	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	TOTAL
OPPS	148,305	160,729	174,243	189,116	201,606	217,074	202,216	180,764	183,497	172,133	160,875	140,366	2,130,925
Break Returners This Month	4,343	5,044	12,532	3,089	2,578	8,935	1,793		1,040				39,353
Functional Skills OPP (Excluding Starts this Month)	1,436	1,496	1,557	1,315	1,255	905	808	829	768	768	527	382	12,047
OPP (Excluding Starts this Month)	142,527	154,189	160,154	184,713	197,774	207,234	199,614	179,935	181,689	171,364	160,348	139,984	2,079,525
STARTS	10,017	11,008	34,155	27,833	28,385	5,181	3,192	16,441	5,099	867			142,176
New Functional Skills Starts This Month	60	60				145	201	121					587
New Starts This Month	9,956	10,947	34,155	27,833	28,385	5,036	2,991	16,320	5,099	867			141,588
COMPLETIONS	26,395	14,062	17,360	31,626	17,492	21,064	13,084	30,630	22,346	15,716	50,230	44,560	304,565
Actual Completion Payments	26,395	14,062	17,360	31,626	17,492	21,064	13,084	30,630	22,346				194,059
Planned Completion Payments										15,716	50,230	44,560	110,506
Planned Completion Payments (Forecast)										15,716	50,230	44,560	110,506
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Provider Incentives													
FUNDING PAYBACK	-10,413	-10,260	-3,991	-4,044	-7,422	-17,538	-8,042	-9,216	-4,223				-75,149
Functional Skills Payback	-4,965	-2,673											-7,638
OPP Payback	-5,448	-7,587	-3,991	-4,044	-7,422	-17,538	-8,042	-9,216	-4,223				-67,511
TOTALS	174,304	175,539	221,767	244,630	240,061	225,781	210,450	218,619	206,718	188,715	211,105	184,926	2,502,516
Total Expected Payment	169,961	170,495	209,235	241,442	237,484	216,846	208,657	218,619	205,678	204,431	261,335	229,486	2,573,669
Total Revenue (Excluding Employer Incentives)	169,961	170,495	209,235	241,442	237,484	216,846	208,657	218,619	205,678	204,431	261,335	229,486	2,573,669

5 tabs

Overview / AiVII Forecast / Historical Analysis / Finance Insights / Return on Investment.

Funding Matrix

Month-by-month actuals across OPPs / Starts / Completions / ALS / Incentives. Every cell drillable.

Filter chips

Year / ILR / Team / Coach / Standard / Ops Manager / Employer / Funding: every page scoped.

Total column

Running totals per row: the at-a-glance year position.

FINANCE DIRECTOR Quarterly board prep

YTD position, forecast curve, ROI: one slide deck pull.

Open Funding Overview. **YTD Revenue card** shows we're £180k ahead of plan. Click the AiVII Forecast tab: trajectory holds through year-end. Finance Insights / Risk & Outlook flags 4 high-risk Standards with revenue at risk. ROI tab quantifies the AiVII bottom-line for the board. **Whole pack pulled in 15 minutes** instead of 3 days of spreadsheet wrangling.

OPERATIONS DIRECTOR Monthly leadership review

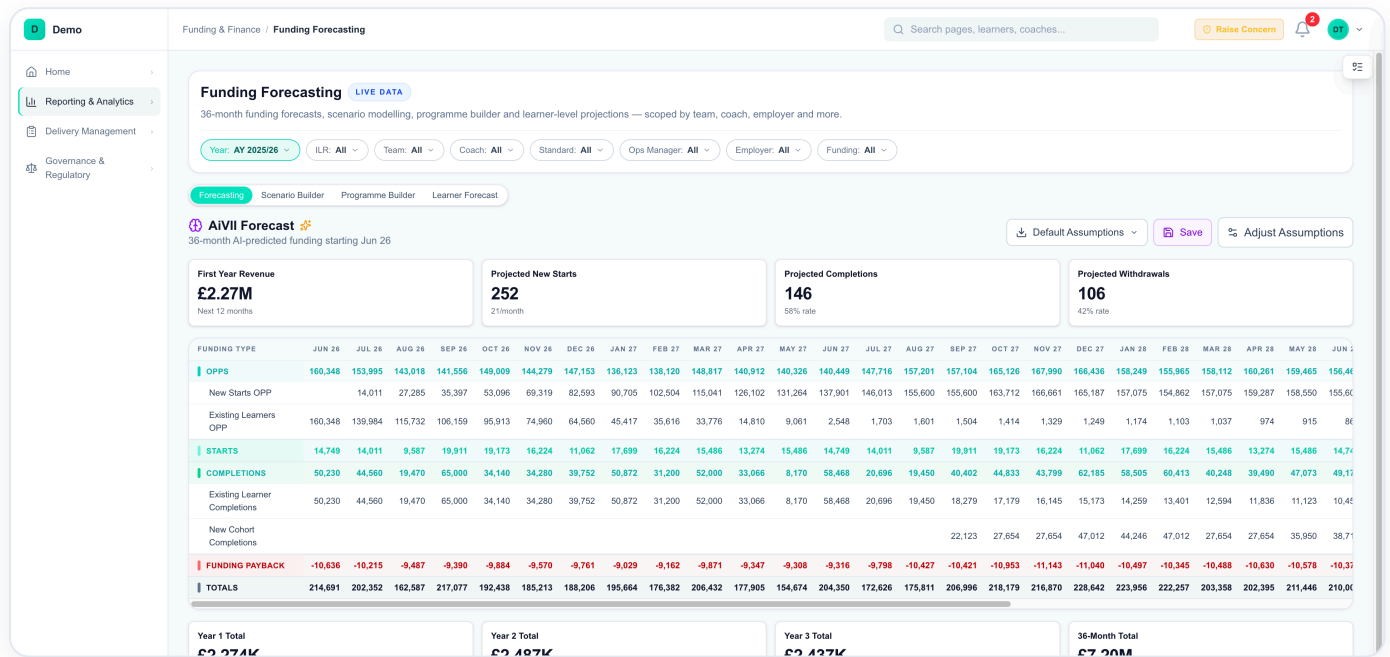
From the past-PED tile to specific actions.

Open Finance Insights / Risk & Outlook. **Out-of-Funding Revenue Loss** shows £4,200/mo not earned. Click into named learners: 5 past PED, 3 are recoverable with gateway extension. **Gateway Pipeline panel** warns next month has 18 PEDs (1.5x avg completions): revenue cliff. Brief the team: action 5 recoverables this week, prep gateway capacity for next month.

FUNDING FORECASTING · HEADLINER

Where the business is heading. Modelled, saved, comparable.

Funding Forecasting is the modelling tool for finance and senior leadership. The screenshot below shows the **Forecasting** tab: the AiVII forecast view with current-cohort KPIs and a 36-month projection matrix. Three further tabs sit on the same dashboard for scenario building, programme building and learner-level forecasting.



01 WHAT THE FORECASTING TAB ANSWERS

- Where's the year's funding heading from current cohorts?
- What's our projected new starts, completions and withdrawals?
- What does the monthly OPP curve look like over 36 months?
- How do AiVII's default assumptions compare to ours, and what changes when we adjust?

02 WHAT'S ON THIS SCREEN

- **First Year Revenue** 12-month projection headline
- **Projected Completions** forecast year-end count + rate
- **Funding Type matrix** 36-month grid: OPPs, New Starts OPP, Existing Learners OPP, Starts, Completions
- **Default Assumptions** AiVII-learned defaults for the cohort
- **Projected New Starts** forecast cohort additions
- **Projected Withdrawals** forecast count + rate
- **4-tab strip** Forecasting, Scenario Builder, Programme Builder, Learner Forecast
- **Adjust Assumptions / Save** edit parameters, save the scenario

03 THE OTHER 3 TABS (SEPARATE SLIDES)

- **Scenario Builder**, tree-aware: leaf team builds cohort scenarios, parent team rolls up sub-teams into an aggregate plan
- **Programme Builder**, model future cohorts (counts, funding, practical/EPA months, withdrawal/completion rates) with monthly OPP projections
- **Learner Forecast**, 5 years of projected learner numbers by Standard with seasonal weighting

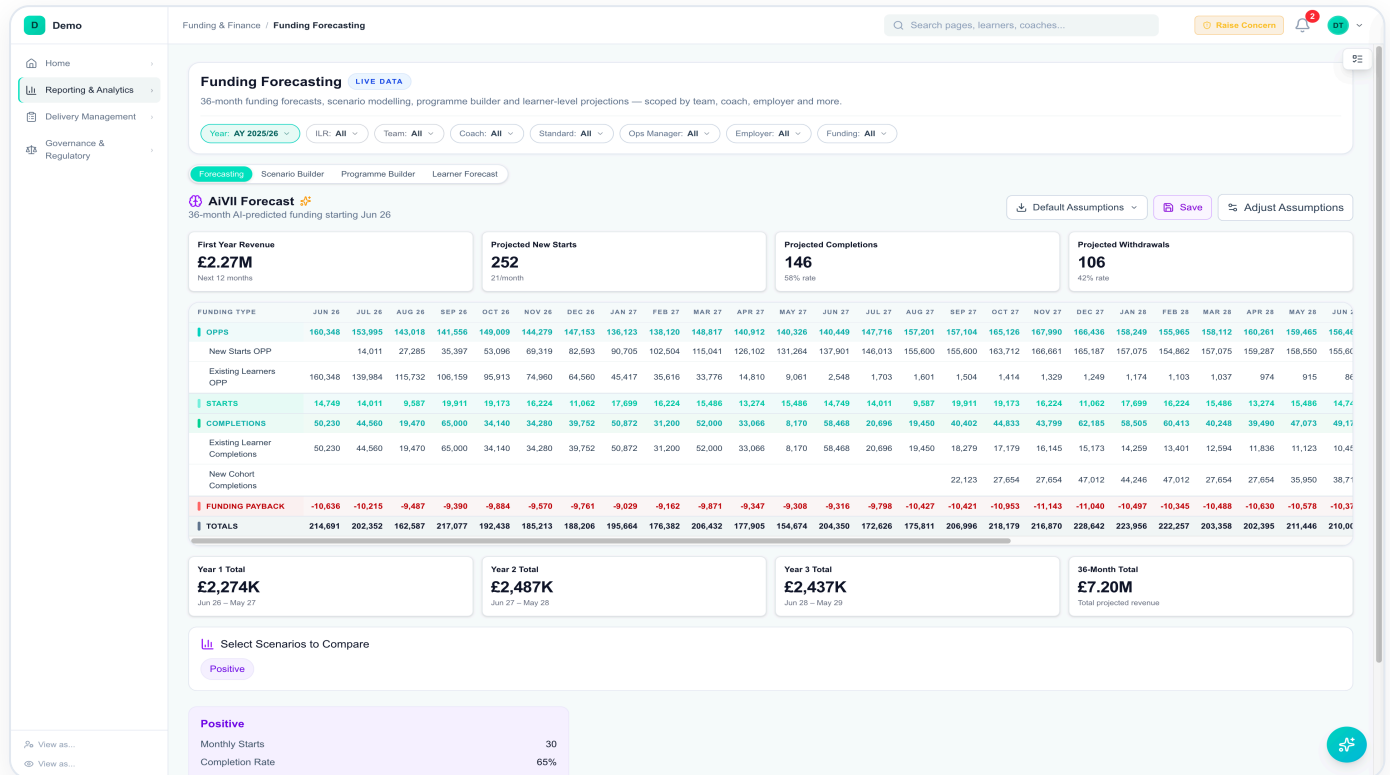
04 FILTERS & SCOPING

- Filter chip row scopes every tab
- Year, ILR, Team, Coach, Standard, Ops Manager, Employer, Funding
- Saved scenarios persist with a tag (cohort vs aggregate) for clean separation
- Download exports any scenario for board packs

FUNDING FORECASTING · IN PRACTICE

Strategy day. Three scenarios, one screen.

How leaders use Funding Forecasting to model new programmes, run growth scenarios, and roll up sub-teams into aggregate plans without rebuilding the spreadsheet every time.



Tabs

Forecasting / Scenario Builder / Programme Builder / Learner Forecast: one page, four modes.

Adjust Assumptions / Save

Editable inputs persist; Save captures the scenario for board comparison.

Projected New Starts

Cohort-forecasted starts with monthly breakdown.

Funding timeline matrix

Month-by-month projection across OPPs / Starts / Completions.

SENIOR LEADER *Strategy day, AM*

Three growth scenarios. One funding curve. One decision.

Open Programme Builder. Model **Scenario A: status quo**: current cohorts only. **Scenario B: +2 new programmes Sep**. **Scenario C: aggressive growth + new region**. Save all three. Open the Combined Forecast view: three lines, three peak revenue months, three risk profiles. The board sees the trade-off in one chart instead of an Excel war room.

OPERATIONS DIRECTOR *Recruitment plan*

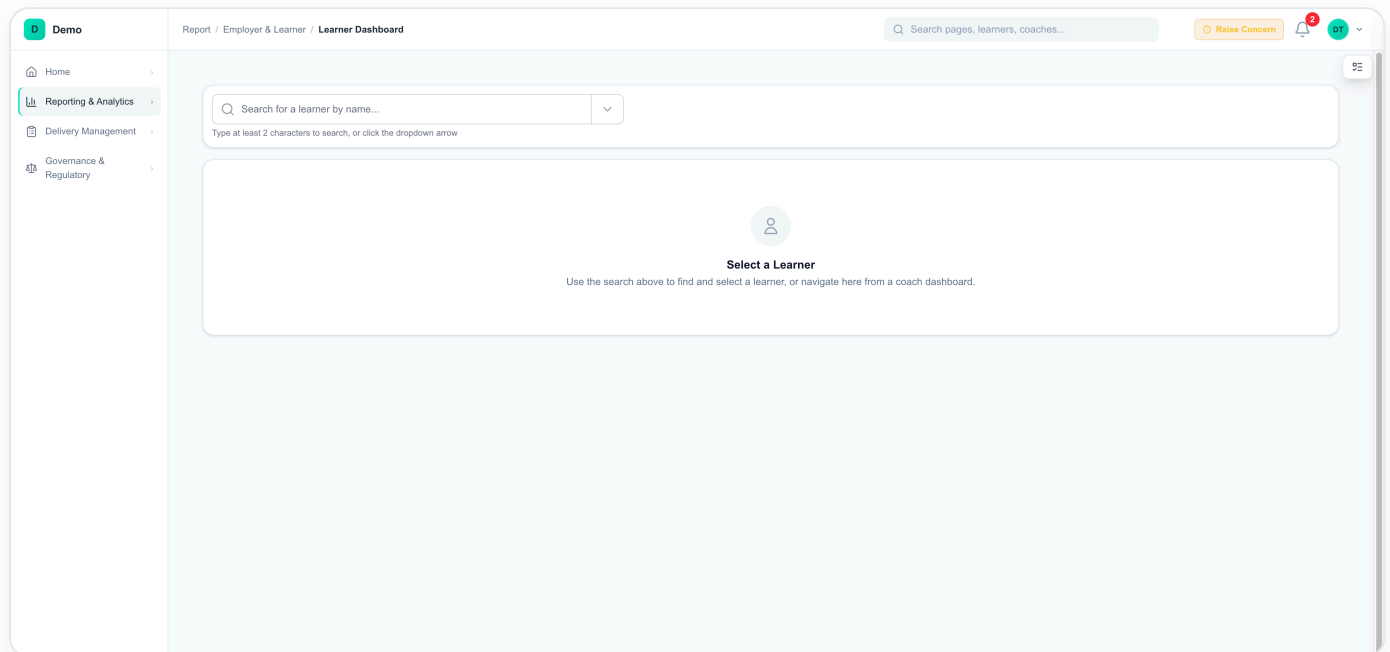
Sub-team capacity vs starts: balanced.

Click into the South region sub-team. **Tree-aware mode** switches automatically. Scenario Builder. Soft-filtered Add Standard dropdown shows the team's delivered programmes. Adjust monthly Starts. Open Coach Capacity in another tab: team will be over capacity by Q3 unless 2 more coaches are recruited. **Concrete trade-off** for the recruitment conversation.

LEARNER DETAIL (360) · HEADLINER

Every dimension of a learner. In one screen.

Learner Detail is the 360 view of a single apprentice. Header panel for identity and status; **8 expandable panels** for Learning Plan, Trends, Gap Analysis, Compliance Risks, AI Review Prep (ControlAI), Training, Evidence and Funding. Skills Coaches use it before reviews; Quality use it for compliance checks; AI Review Prep generates a structured prep brief in seconds: key points, concerns, discussion topics, quick wins.



01 WHAT IT ANSWERS

- What's this learner's full status: progress, risk, compliance?
- What activities are they on, what's overdue?
- What KSB gaps remain?
- What compliance flags are active?
- What should the next coach review focus on?

02 KEY METRICS SHOWN

- **Learner Overview** name · programme · employer · coach · dates · risk
- **Trends Panel** LP / OTJH / Completed OTJH / O/S Marking
- **Compliance Risks** 42-Day / Agreement / Reviews / Funding / OTJH / Documents
- **AI sections (ControlAI)** Key Points · Concerns · Discussion Topics · Quick Wins
- **Evidence Panel** uploads + download/delete
- **Assign Signal modal** attach a learner-level signal

8 PANELS

- **Learning Plan Panel** activities · completion · overdue · progression %
- **Gap Analysis** Knowledge / Skills / Behaviours / Gaps Remaining
- **AI Review Prep** Days Since Review · LP · OTJH · Risk · Activities · Overdue
- **Training Panel** modules + learner-link generation/regeneration
- **Funding Panel** funding milestones + status
- **Create Action Plan modal** spin a Quality Improvement Plan from this view

03 AI FEATURES (CONTROLAI)

- **AI Review Prep:** structured brief generated for the next coach review
- **Key Points to Acknowledge:** positive progress to call out
- **Concerns to Address:** risks the coach should challenge directly
- **Suggested Discussion Topics:** substantive prompts
- **Quick Wins:** near-term actions to lift LP/OTJH

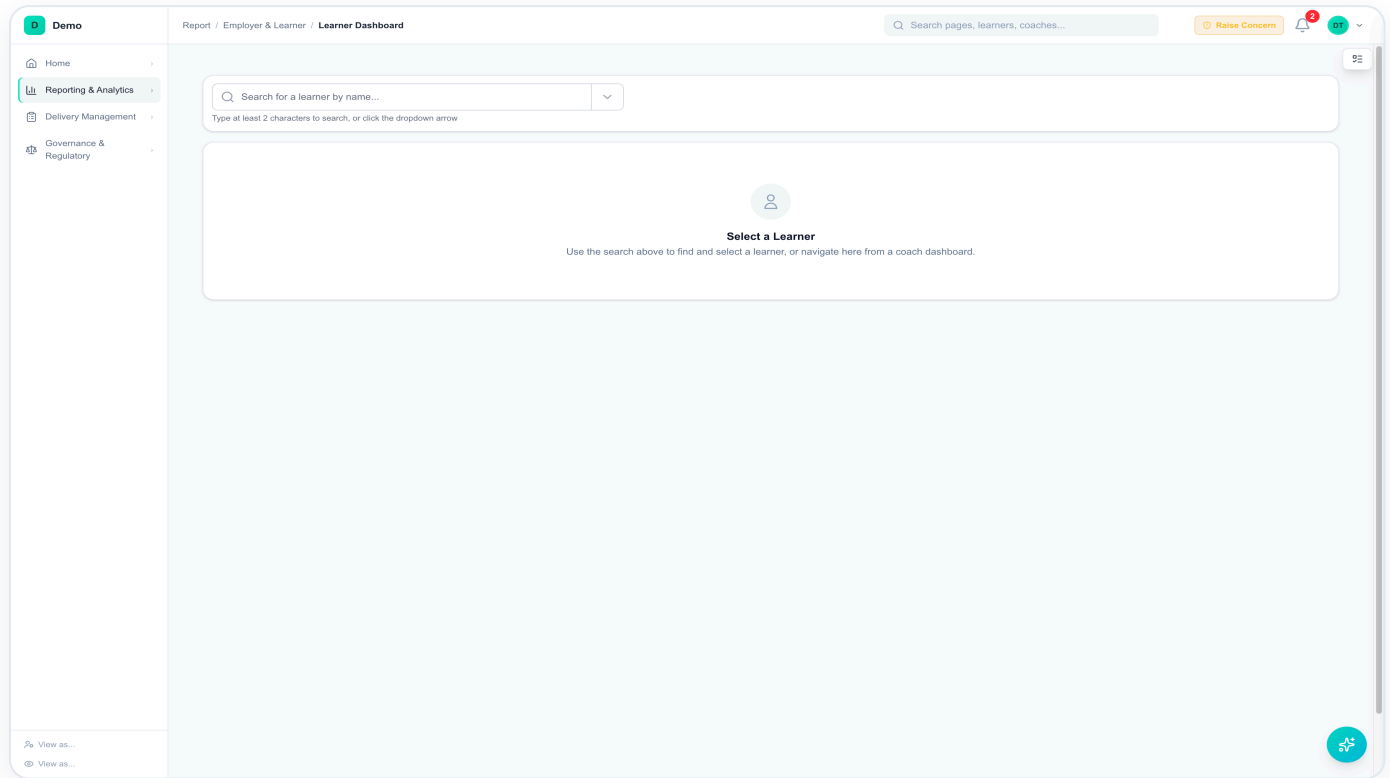
04 DRILL-THROUGHS & ACTIONS

- **Historical Date Picker:** view any past snapshot of this learner
- **Each panel** has its own deep drill-throughs (e.g. activity click, evidence open)
- **Assign Signal** → attach a learner signal that propagates to risk + reviews
- **Create Action Plan** → opens a QIP from the learner context

LEARNER DETAIL (360) · IN PRACTICE

Three minutes of prep that changes the review.

How coaches and Quality use Learner Detail before reviews and audits. AI Review Prep generates a structured brief in seconds; the 8 panels cover every dimension a coach or manager needs.



Panel tabs

Learning Plan / Gap Analysis / Compliance / Trends / Training / Evidence: every dimension one click away.

AI Review Prep

ControlAI: structured prep brief with Key Points / Concerns / Discussion Topics / Quick Wins.

Live Data picker

Switch to any past snapshot: useful for ESFA audit and longitudinal comparison.

Create Action Plan

Spin up a QIP from the learner's context with prepopulated evidence references.

SKILLS COACH 30 min before review

Open AI Review Prep. Get a structured brief. Lead a substantive review.

Open the learner's 360. Tap **AI Review Prep**. AI generates a structured brief: *Key Points*, great progress on three KSBs since last review. *Concerns*, OTJH 6pp behind plan and two activities marked overdue. *Discussion Topics*, ask about workload pressure on Site B. *Quick Wins*, book the Maths Functional Skills session. **The review is no longer generic.**

QUALITY MANAGER ESFA audit prep

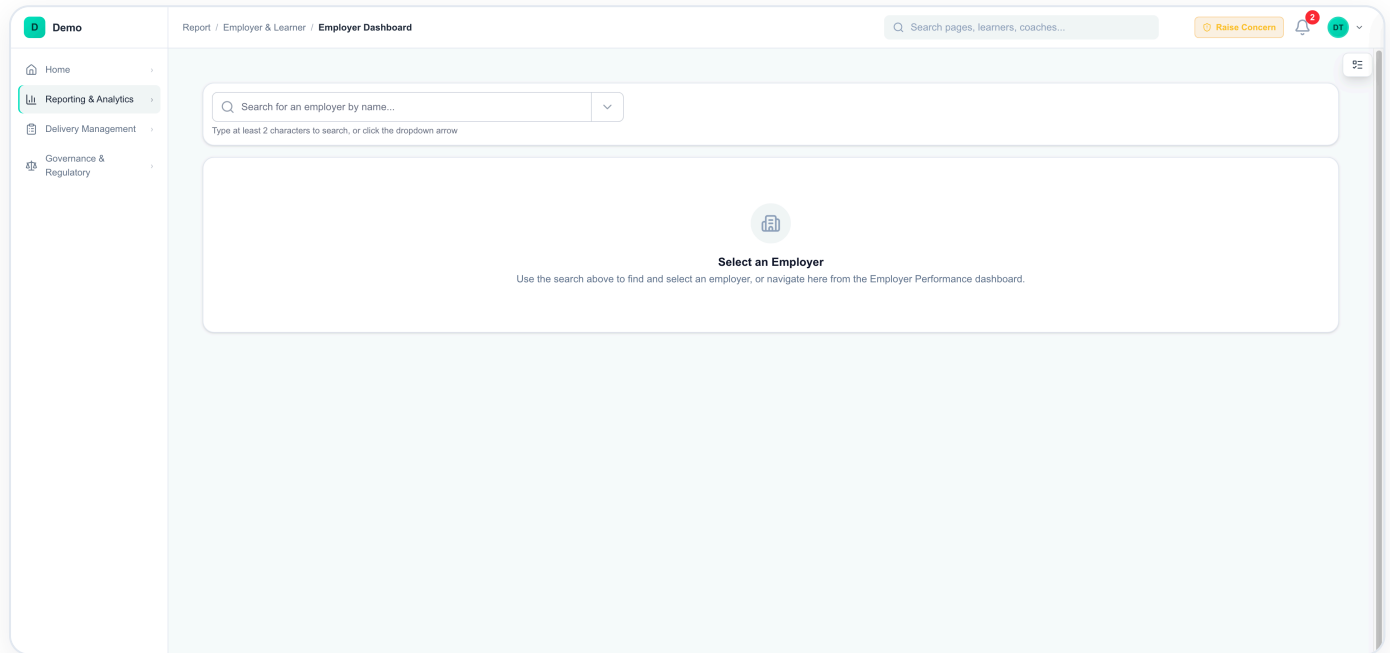
Compliance + Evidence panels: ready for audit.

Open the flagged learner. **Compliance Risks panel**: 42-Day rule met, agreement signed, 12-week reviews on track. **Evidence panel**: portfolio uploads, training records, signed forms all present. **Historical Date Picker**: pull the snapshot from the audit period. Print to PDF, attach to evidence pack. Done.

EMPLOYER DETAIL

Every learner, every coach, every programme. Per employer.

Employer Detail is the 360 view of a single employer: levy status, parent / child structure, learner breakdown across In Progress / Completed / Withdrawn / On Break / In EPA, programmes delivered, and coach team. Trends and Evidence tabs cover historical learner flow and compliance documents. Used by Sales, Operations and Quality to brief before employer meetings.



01 WHAT IT ANSWERS

- What's this employer's full picture across programmes and coaches?
- Where are their learners: in progress / completed / withdrawn?
- Who's their assigned coach team?
- Are they parent of child employers we should know about?
- What's their compliance evidence trail look like?

02 KEY METRICS SHOWN

- **Employer Overview** name / levy / parent / address / contact
- **On Break / In EPA** 2 status counts
- **Skills Coach Breakdown** coaches assigned + learner count per
- **Trends tab** historical learner flow metrics
- **In Progress / Completed / Withdrawn** 3 status counts
- **Programme List** programmes delivered + learner count per
- **Location Hierarchy** child employers list w/ learner counts
- **Evidence tab** compliance documents per employer

03 DRILL-THROUGHS

- Click a learner status segment → named learners in that bucket
- Click a programme row → learners on that programme with this employer
- Click a coach → **Coach Detail** filtered to this employer
- Click a child employer → that employer's detail page

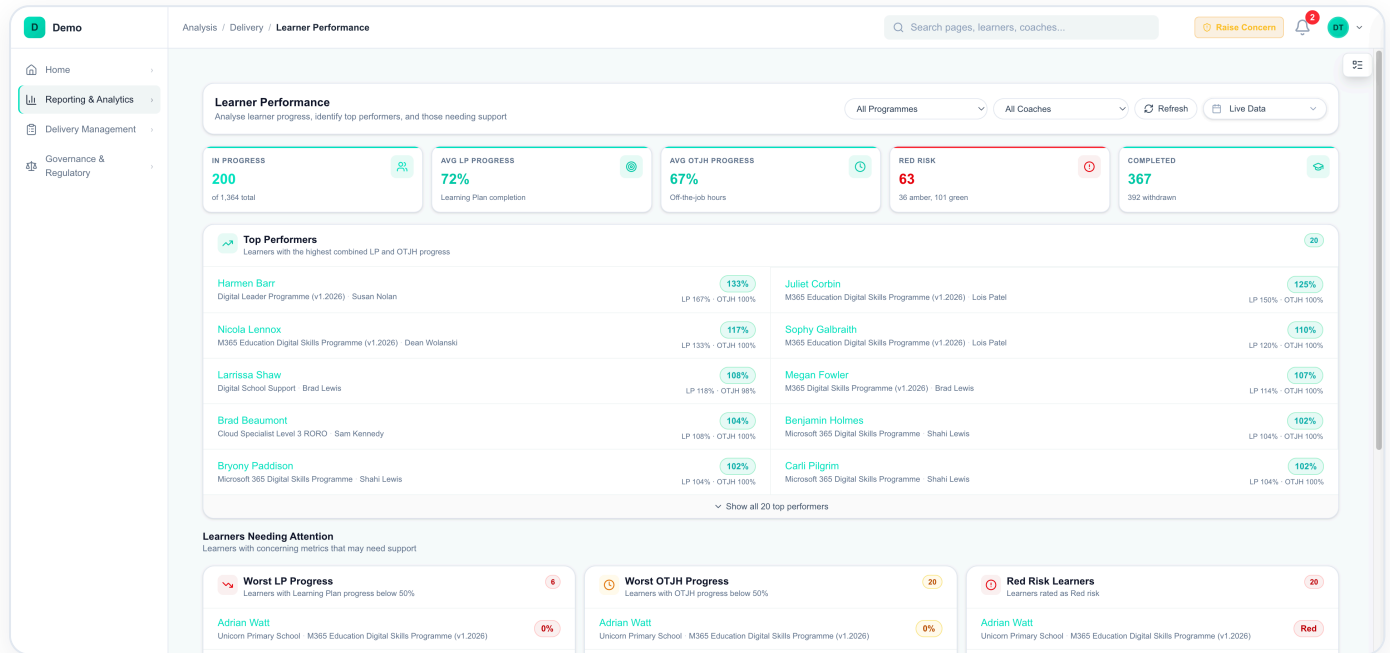
04 TABS & SCOPING

- **Tabs:** Detail · Trends · Evidence
- **Levy / Non-Levy** badge prominent in header
- **Parent / child** structure honoured for group employers
- Used in pre-meeting briefings, account reviews and contract renewals

LEARNER PERFORMANCE & EMPLOYER PERFORMANCE

Where to focus this week. Ranked.

Two analytical sweeps that surface where to focus intervention. **Learner Performance** ranks learners by LP Progress, OTJH Progress, Risk Rating and Review Overdue, with explicit “Worst” cards for fast triage. **Employer Performance** ranks employers by Withdrawal Rate, Overdue Activity Rate and Break Rate: surfacing the relationships that need management attention.



01 WHAT IT ANSWERS

- Which learners need attention right now?
- Which employers are dragging our metrics down?
- Where should management focus this week / month?
- Who's the worst-performing: learner level and employer level?
- What does the trend say across all my learners / employers?

03 DRILL-THROUGHS

- Click a learner row → **Learner Detail (360)**
- Click an employer row → **Employer Detail**
- Click a Risk badge → learners at that risk band
- CSV export for offline analysis or board packs

02 KEY METRICS SHOWN

- **In Progress / Completed** Learner Performance KPIs
- **Red Risk count** learner level
- **Red Risk Learners** flagged learner list
- **All Learners table** 12 columns, sortable, CSV export
- **Completed / Withdrawn / In EPA** 3 status counts
- **High Overdue / Break Rate** 2 attention cards

2 PAGES COMBINED

- **Avg LP / OTJH Progress** team averages
- **Worst LP / Worst OTJH** 2 expandable cards, bottom performers
- **BIL Required / Review Overdue** 2 attention cards
- **Total Employers / Learners** Employer Performance KPIs
- **High Withdrawal Rate** employers above threshold
- **All Employers table** 10 columns w/ levy filter

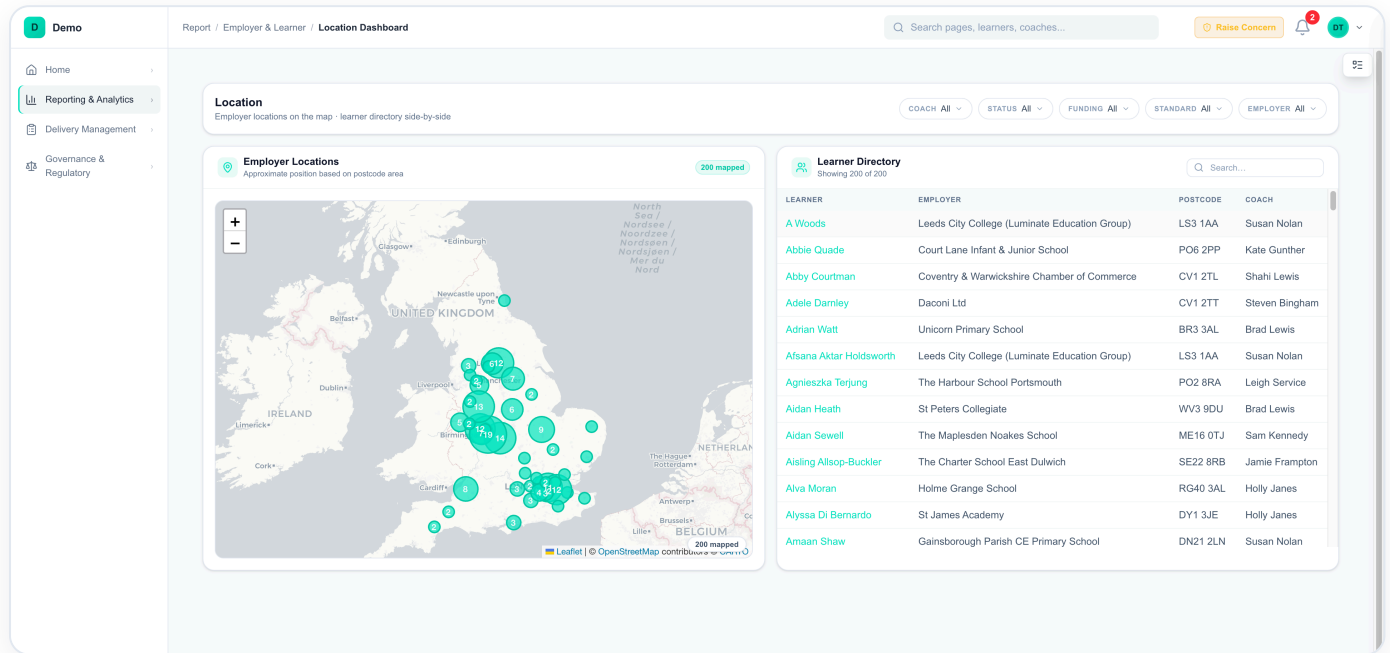
04 FILTERS & SCOPING

- **Sortable columns** on every column: fast triage
- **Levy / Non-Levy** filter on Employer Performance
- **Risk badges** use RAG colours throughout
- **Threshold tuning** for Worst / High Rate cards configurable per tenant

LOCATION

Geography meets caseload. Map on the left, learner directory on the right.

Location is the geographic view. Employer locations cluster by postcode area on a UK map; a searchable learner directory sits beside it. Operations Leaders use it to plan coach travel; Sales use it to spot regional patterns and recruit-to-territory opportunities.



01 WHAT IT ANSWERS

- Where geographically are our learners and employers?
- Are coaches travelling efficiently across their caseload?
- Where do we have regional gaps or over-concentration?
- What's the postcode density for cohort planning?
- Which territories should we recruit into?

02 KEY METRICS SHOWN

- **Employer Locations Map** UK Leaflet map, postcode area clusters
- **Learner Directory** searchable side-by-side table
- **Row count** "Showing {X} of {Y}"
- **Cluster count badge** "{X} mapped" on each cluster
- **Columns:** Learner (link) / Employer / Postcode / Coach
- **Search** learner name / employer name / postcode

03 DRILL-THROUGHS

- Hover a row → link to **Learner Detail**
- Click a map cluster → learners + employers in that postcode area
- Click an employer marker → **Employer Detail**

04 FILTERS & SCOPING

- **Filter pills:** Coach · Status · Funding · Standard · Employer
- **Clear all** button to reset
- Postcode area centroids used for clustering. UK postcode geography baked in
- Coach travel time / distance modelling on the roadmap

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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Let's talk. 30 minutes. Your data.

Book a demo and we'll set up a live walk-through with your tenants, your roles and your questions answered. No prep work needed your end.

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30-minute live walk-through, no commitment.

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Platform tour, pricing, security, case studies.

PRICING

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