



# staffcircle

## Service Definition Document

StaffCircle Performance Management Software



## Table of Contents

<b>INTRODUCTION</b>	<b>2</b>
Company Overview	2
Value proposition	2
Details of our Software	3
Overview of G-Cloud Service	4
<b>DATA SECURITY AND PROTECTION</b>	<b>5</b>
Data hosting provider	5
Software Scalability and Redundancy	5
Security Groups and mixed-mode authentication	5
Realtime Anti-Virus	5
Secure Fields	5
Single Sign on	6
Office 365 User Synchronisation	6
3rd Party Penetration Testing	6
3rd Party Realtime Uptime Checks	6
<b>USING OUR SOFTWARE PLATFORM</b>	<b>7</b>
Ordering our Platform	7
Trialling the Platform	7
Deployment Process	7
Training	8
Service Level Assurance	8
Financial Refund for SLA underperformance	8
Customer Responsibilities	9
Customer Technical Requirements	9
Service Deliverables	9
Service Term	9
Customers	10
Service Contacts	11



## Introduction

### Company Overview

StaffCircle uniquely combines performance management and employee engagement into one cloud platform that measurably improves workplace culture, achieves greater operational efficiency and delivers a better employee experience.

StaffCircle is all-in-one software which provides a single source of truth for performance management, culture and values as well as employee engagement. Our platform works on both desktop and mobile making it suitable for both office and front-line employees, unifying the entire workforce.

StaffCircle launched as part of the London Microsoft Accelerator. We are a Microsoft Silver Partner with Microsoft Co-Sell and Microsoft Transact global status. This means we are listed directly on Microsoft internal product catalogues and our product can be sold by Microsoft's global sales teams. In addition, we can be billed directly by Microsoft for organisation using Microsoft's Enterprise licensing scheme.

### Value proposition

StaffCircle is an incredibly flexible but easy to use platform. We built our software to unify the workforce around culture, behaviours and performance management. We believe you can't have optimal workforce performance without having an aligned culture, and the foundation of culture is communications. Our platform is built on connected layers around internal communications, culture and performance management.

We also don't believe you should need to change your performance management processes until you are ready to. We've built StaffCircle to support real-time feedback and performance conversations throughout the platform, but you can also use structured appraisals, monthly one2ones, quarterly reviews or any type of one off or structured recurring meetings.

Employees can feedback to other members of the team at any time and this feedback is linked to your values and behaviours. All objectives and even individual performance appraisal questions can be linked to your competency framework.

Public sector has a mix of office based, home based and front-line workers. StaffCircle is the only platform which can truly unify all these different groups of people.

All functions are accessible by both desktop and mobile and alerts can be sent using push notifications, email, SMS and Microsoft Teams so it doesn't matter what device you are using or which application you have installed, you can interact. Even if you only have a mobile phone, the system can push information to you by SMS.

In the era of COVID-19 we know an individual's own mobile device is probably the safest way to interact with their organisation, fill out digital forms, receive critical alerts, feedback on objectives, book one2ones and more. StaffCircle offers the complete platform for digitising structured interaction between employee and manager.

Furthermore, Local Government is facing mounting pressure on budgets so now more than ever, value for money, is a critical part of the buying criteria. StaffCircle offers maximum value by combining the capability of several systems into a single all-in-one solution and at the same time ensuring we offer some of the most affordable costs in the industry.



## Details of our Software

Our software platform is designed to deliver a holistic approach to managing the end to end employee experience in one consolidated platform which gives 360 insight into performance, engagement and sentiment across distributed, dispersed workforces.

These data-driven insights provide the basis for informed decision making and a more strategic HR function. Our unique approach is helping customers across the UK to achieve high performing cultures with more engaged employees and strengthens their ability to attract and retain talent.

Our team are performance management experts who are able to support and advise from first sales contact, throughout the deployment process, and then through the lifetime of the relationship via a dedicated Customers Success Manager.

We are built natively on Microsoft Azure with .NET Core and deeply integrated into the Microsoft software stack which will provide a series of additional benefits to users of Microsoft Office 365 and their related tools.

The StaffCircle software platform solves the following challenges:

- Centralises and automates all performance management removing the high admin burden of managing workforce.
- Gives Managers a easy to use web interface to see progress, interact and manage their direct reports ensuring all conversations are logged in the correct part of the system.
- Provides a tool for HR to provide strategic direction to the organisation and scale across all functions of the organisation
- Provides a single place for employees to access performance & internal communications.
- Enables Leaders to see a single source of truth.

## Overview of G-Cloud Service

StaffCircle is continually increasing the value of our software by releasing new features every 6-8 weeks. Over 60% of the features we release each year are driven by our customers. All G-Cloud customers are automatically invited to be part of our Product Steering Committee which regularly meets online to discuss the future path of the software helping us to continue to deliver world class software.

Feature Summary	
Feature	Feature Description
<b>One2One Check-ins</b>	Enable One2One's between the employee and their manager. One2Ones can be set to allow the employee to request them or be set on a recurring weekly or monthly basis. One2One Check-in reviews support real-time conversations, documents attachments and structured questions (scored or text input). One2One check-ins are accompanied with an email with calendar invite for both manager and employee and any late one2one's will be "chased" by the system
<b>Monthly &amp; Quarterly Reviews</b>	Save time and create consistency by enabling Monthly or Quarterly Reviews to automatically be created by the system and sent to the manager and employee with a calendar invite. Monthly & Quarterly Reviews can be set to include structured questions or simply free text feedback. Employee's open objectives can also be checked, and new ones created – all from the same review screen. Both managers and employees can complete questions and a review sheet with coaching can be downloaded as a pdf or viewed online.
<b>Realtime Performance Feedback</b>	Realtime performance feedback is enabled across the entire performance management system. This enables conversations between employee and manager across Objectives and Reviews including One2One's and Full Appraisals. Conversations can include attached documents and images and recipients are alerted to new comments via email, push or SMS.
<b>Customisable Appraisal &amp; Review Templates</b>	Powerful Review Template enable an organisation to define all structured meetings (eg: 3-month probation review, one2one's, quarter or annual appraisals) and the system can be set to automatically create them at specified intervals and then alert the manager and employee saving time and reducing admin work. Appraisal templates enable HR managers to create the structured questions then answered during any meeting or review. Each person (employee, manager, colleague and customer) can be asked separate questions.
<b>360 Appraisals</b>	The 360 appraisals function enables you to specify separate audiences for review feedback. For example you can create a review for senior account managers which ask not only the manager to feedback but also their colleagues and even external customers or partners. Templates can be used to set up different questions for the different audiences.
<b>Development Objectives</b>	Development Objectives can be set for individuals, department or the company in order to achieve certain goals. for the development of the individual, department or company. Personal Development Objectives can be used as part of a Personal Development Plan or aligned to department goals.
<b>Performance KPI Objectives</b>	Performance Objectives enable you to set KPIs for various teams. Objectives can be tagged in order to group various types of objectives across an organisation. Objective scoring can be set to simple logical Yes/No or percentage, numeric or financial amounts. Objectives can be set to individuals, departments and company and can be linked together and can be set as one-off or to recur automatically at scheduled intervals. Objectives can be updated by the individual, their manager, csv file import or by a 3 <sup>rd</sup> party system or integration
<b>Skills</b>	Skills can be uploaded, customised and set for each individual, job roles and even teams. Skills Gaps show up where individuals do not have all the required skills for the job role they have been assigned. Personal development plans can then be used to fill these skills gaps.
<b>Achievements</b>	Achievements can be setup on the system and applied to individuals to reflect courses or certificates being acquired. Achievements can be configured with skills which are automatically given to a customer one they have acquired the relevant achievement. Achievements can also have an expiry date to reflect annual renewals for example.
<b>Awards &amp; Recognition</b>	Create awards and peer to peer recognition to enable your workforce to say thank you and recognise co-workers for behaviours aligned with culture. Awards can be points based and can be one2one or assigned by managers and promoted on the news feeds.
<b>Mission &amp; Values</b>	Communicate your Mission & Values clearly with the entire company. Embed text, images and video to bring your culture to life.
<b>Critical Alerts</b>	Enables any urgent messages you need to send to Individuals, Teams, Departments, Locations or Everyone. Uses multi-channel Notifications with Email, SMS, In App push Notifications to ensure everyone reads the message even if not logged in. Alerts can be categorised based on severity and are two way, so they can be replied to (via email or SMS) and the replies are automatically sent to the manager.
<b>Today Screen</b>	Today Screen gives user and managers a customisable single view of all culture and communications within their direct team and their wider teams. Today screen components include sending and receiving messages, article comments, feedback and awards enabling managers to assign awards, give feedback, comment on other feedback and generally communicate with their team from a view.
<b>Social channels</b>	Break down departmental silos with the social feeds feature. Allow team members to share photos, articles, videos and documents onto social feeds categorised by interest, topic or anything you choose. Optional approval processes ensure compliance with company rules. Built in anti-virus checker automatically scans all new images and files to keep users safe.
<b>eNPS Surveys</b>	Employee Net Promoter surveys provide an easy way to take the pulse of your employees. Can be set in normal, anonymous or semi-anonymous modes and over a period of months can build a picture up of differences of sentiment based on teams, managers and locations.
<b>Culture Feedback</b>	Ability for any employee to give direct feedback to others and link that feedback to the company values. Personal feedback (given and received) is then surfaced inside performance reviews.
<b>Multi-Channel Articles</b>	Various types of articles can be built including social, blogs, tasks with digital sign off, surveys. Customisable article notifications can be delivered via email, SMS, in-app push. Articles can be sent to individuals, teams, departments or groups of people based on status (pre-employees, contractors, furloughed workers etc)
<b>Worksheet Builder</b>	The built in Worksheet builder can be used to assign onboarding and offboarding worksheets and tasks to new and ex-employees. Worksheets can also be used for a variety of uses including Health & Safety forms, Accident Reports, Travel Expenses and return to work sheets.
<b>Dashboards &amp; Reports</b>	Powerful dashboards give you deep insights into the performance individuals, teams, departments or your organisation as a whole. Customisable reporting enables you to view and export performance data across objectives, reviews and appraisals as well as download individual feedback.



## Data Security and Protection

### Data hosting provider

StaffCircle's UK platform and your data is hosted in UK Microsoft Azure Datacentres (UK-South and UK West) which are located in London Docklands and Cardiff to maintain 100+ mile separation. Microsoft Azure datacentres are also responsible for hosting Microsoft Office 365 which most local government bodies use or are moving to. Microsoft Azure Datacentres lead the industry in ISO certifications and adhere to the following standards: CSA STAR, ISO 27001, ISO 27017, ISO 27018, ISO 20000-1, ISO 22301, ISO 9001.

### Software Scalability and Redundancy

StaffCircle's platform is built natively on Microsoft Azure. This means our software is built using the native software services developed directly in Azure by Microsoft rather than using separate containers or virtual machines. The benefit of this is that we can take advantage of the most advanced built-in scaling and redundancy features Microsoft Azure has to offer; including power redundancy, compute redundancy, geographic redundancy (100-mile data centre separation) with automatic failover and scale-out. Microsoft is a world leader in planet-level scalability and StaffCircle is designed natively to take advantage of this fact.

### Security Groups and mixed-mode authentication

IT Managers will appreciate the highly granular user/manager/superuser level of access using Security Groups which can be set for access to various parts of the system and then applied to groups of users in a similar style to Active Directory. We can also support both single sign-on using Office 365/Active Directory for Office users and Mobile phone number sign-on for the front-line workers – both using the same security group model. This ensures that no one is left out but at the same time, the IT department have the correct level of security controls required.

### Realtime Anti-Virus

In today's public internet environment, it is important to ensure you choose a platform which keeps your users safe from viruses. StaffCircle is one of the few platforms which has an integrated transparent real-time anti-virus scanner. Any document or image uploaded to the system will immediately be scanned and then released. During the scanning processes, usually less than 10 seconds, the file or image cannot be used or distributed to other users. If a virus is found, then the file or image is automatically quarantined, and the administrator is notified. This type of security is important when using non-certified or end user laptops, tablets or smart phones which are outside the control of your Internal IT department.

### Secure Fields

For added security, StaffCircle pioneered *Secure Fields* – a field level two factor authentication system for protecting sensitive information without adding friction to the end user experience.



### **Single Sign on**

StaffCircle provides single sign-on (SSO) for authentication with Office 365 or Active Directory at no extra cost. This provides the ability for end users to log into StaffCircle using their Office 365 login.

### **Office 365 User Synchronisation**

If you use Microsoft Office 365, you will also be able to automatically synchronise users and activate or de-activate them based on what is happening in your Office 365 account. This feature reduces maintenance of users on StaffCircle.

### **3rd Party Penetration Testing**

StaffCircle's platform is tested at regular intervals by a 3<sup>rd</sup> party CREST accredited Penetration partner.

### **3rd Party Realtime Uptime Checks**

StaffCircle's platform is continually monitored for uptime by a 3<sup>rd</sup> party tool which is available to all customers.

## Using our Software Platform

### Ordering our Platform

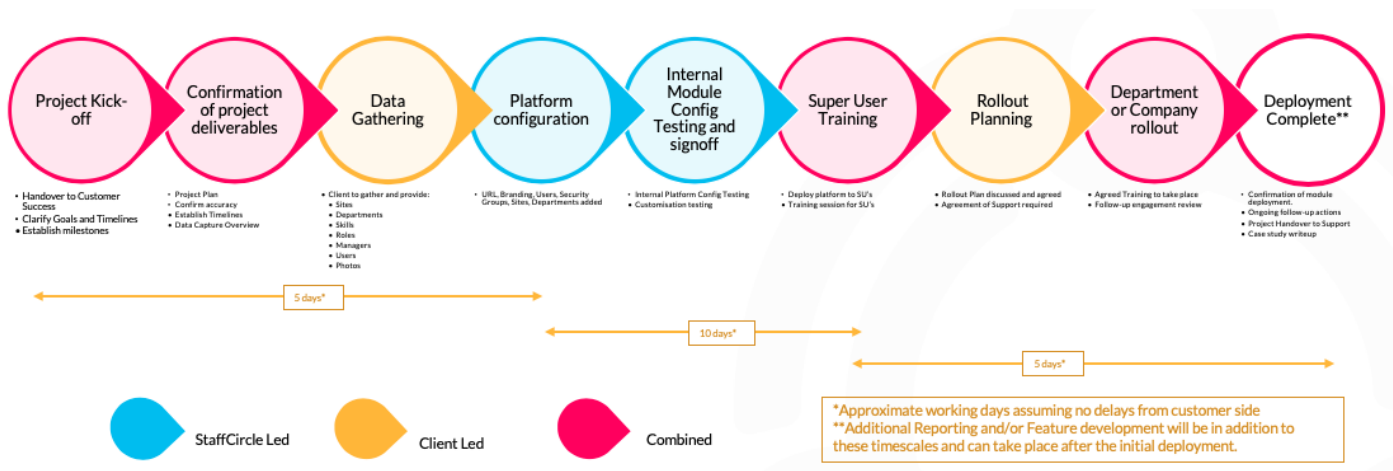
StaffCircle initially provides the customer product demonstrations to various stakeholders over remote web sessions and then formally provides a quotation. Our services are based on an annual license fee based on a range of users as specified in the pricing document.

### Trialling the Platform

StaffCircle offers a managed trial for a limited period of time for customers on request. Each trial is managed by a dedicated customer success manager with clear trial success criteria identified at the start of the trial process and reviewed throughout and at the end of the trial.

### Deployment Process

StaffCircle provides a fully managed deployment process with a dedicated customer success manager who is responsible for your deployment, training and on-going support. The deployment steps are outlined below:







## Training

As part of the onboarding process your customer success manager will create a bespoke training plan to include:

- Training of your HR team on how to administer, configure and maintain the system.
- Training managers how to use the system to manage their employees effectively.
- Providing you with bespoke videos, online resources, PowerPoint decks which you can use as a basis for your internal workshops / training.
- We will provide you with a communication plan and template materials to help you to embed the new processes and support the adoption of the performance management culture within your organisation.
- Once your platform is setup and handed over, you will have ongoing customer support from us based on our Service Level Agreement and tracked via our online helpdesk system which is integrated into our product.

## Service Level Assurance

StaffCircle is available to Customers 24 hours per day, 7 days per week, subject to any Planned Maintenance or Unplanned Downtime as outlined below.

We pride ourselves as offering some of the highest service levels in the industry. Our core offering is based around a 99.9% availability – guaranteed and backed up with a money back guarantee.

Our SLA also covers our support ticket response times as follows:

Ticket Severity	SLA Response Time
Critical – System is not available	3 hours
Severe – Core functionality is seriously impacted and cannot be used	5 hours
Low – Standard help, low-level issue or how-to questions	3 hours (during normal workday operations)

## Financial Refund for SLA underperformance

In the event we do not meet or surpass these uptime metrics, a service credit will be available from us as follows:

0.2% under uptime target = 5% refund of your monthly service credit  
0.3% under uptime target = 10% refund of your monthly service credit  
0.4% under uptime target = 20% refund of your monthly service credit  
0.5% under uptime target = 30% refund of your monthly service credit  
0.6% under uptime target = 40% refund of your monthly service credit  
0.7% under uptime target = 50% refund of your monthly service credit  
0.8% under uptime target = 60% refund of your monthly service credit  
0.9% under uptime target = 70% refund of your monthly service credit  
1.0% under uptime target = 80% refund of your monthly service credit  
1.1% under uptime target = 90% refund of your monthly service credit

Uptime guarantees are based on normal working operation and do not cover pre-planned maintenance, emergency maintenance or downtime resulting from DDoS and DoS attacks... (i.e. attacks by an external party that cause our service availability be reduced) We monitor our network and platform 24x7x365 using a variety of tools including an externally located 3<sup>rd</sup> party monitor called Uptime Robot which provide a real-time and monthly service uptime report.



## **Customer Responsibilities**

Customer shall comply with the AUP. Customer shall not: (a) use the System for service bureau or time-sharing purposes without prior written consent or in any other way allow third parties to exploit the System; (b) provide System passwords or other log-in information to any third party; (c) share non-public System features or content with any third party; (d) access the system in order to build a competitive product or service, to build a product using similar ideas, features, functions or graphics of the System, or to copy any ideas, features, functions or graphics of the System; or (e) copy, alter or use the system code without prior written authorisation.

## **Customer Technical Requirements**

StaffCircle is a web-based software platform accessed through the internet. StaffCircle aims to make our software compatible with the latest 2 versions of the popular web browsers on either Mac or PC. For mobile / smartphone access, users are required to have either iPhone or Android with an up to date version of the operating system and to use the default mobile web browser.

## **Service Deliverables**

As part of the deployment process, the StaffCircle software platform will be made available to the customer with a service level agreement as detailed in this document. StaffCircle's software platform is updated with new features every 6-12 weeks and your customer success manager will be in regular contact to import and train the administrators on these new capabilities.

## **Service Term**

The service term of this Agreement (the "Term") shall commence on the Service Commencement Date and continue until the Expiry Date specified in the Service Contract, subject to any agreed Extension periods.

## Customers

Below is a small selection of our customers and quotes which are regularly updated on our website at [www.staffcircle.com](http://www.staffcircle.com)

**Heather M** ★★★★★ 

“ We made the absolute right decision bringing Staff Circle into our organisation. They are so passionate and knowledgeable and the platform is so easy to use and incredibly effective. I really love how intuitive Staff Circle is and just how much you can do with it. It is a powerful, engaging, simple to use platform with an amazing support team. They go above and beyond to help and support. Staff Circle satisfies all our needs and I am thrilled with the results it has brought us so far. I cannot recommend the team and their platform highly enough.

**EValue**

”

**Steve P** ★★★★★ 

“ I have been in the HR / Training / Change business for rather longer than I would like to admit and as soon as I experienced Staffcircle my comment was - 'I wish I had this 20 years ago!'.

People management and change management is all about communication and inclusion and in this world of social media immediacy employees expect employers to innovate and find the very best ways to do this.

Staffcircle is the very best.

**allfoundations**  
Specialist Civil Engineering Contractors

**Jo C** ★★★★★

“ We are a large GP practice and have been looking for a suitable HR platform to encompass all our current and future needs.

5 Stars for customer service, price and that quality of tacit understanding that very few IT support provide. We are in the early stages of our relationship with them, but cannot recommend them highly enough.

**NHS**

”

**Clair M** ★★★★★

“ We were one of StaffCircle's first clients and it has been a pleasure to see them evolve and adapt to their customers' needs. The platform is so easy to navigate and looks really professional on a smartphone which is essential to us as we have two thirds of our workforce without email access.

StaffCircle have also been instrumental to us since lockdown as it has given us a platform to be able to communicate with our employees. As a HR professional, they have made my life easier and I cannot recommend them enough.

**PITCS**

”



## Service Contact

For further information and to discuss next steps, please contact

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