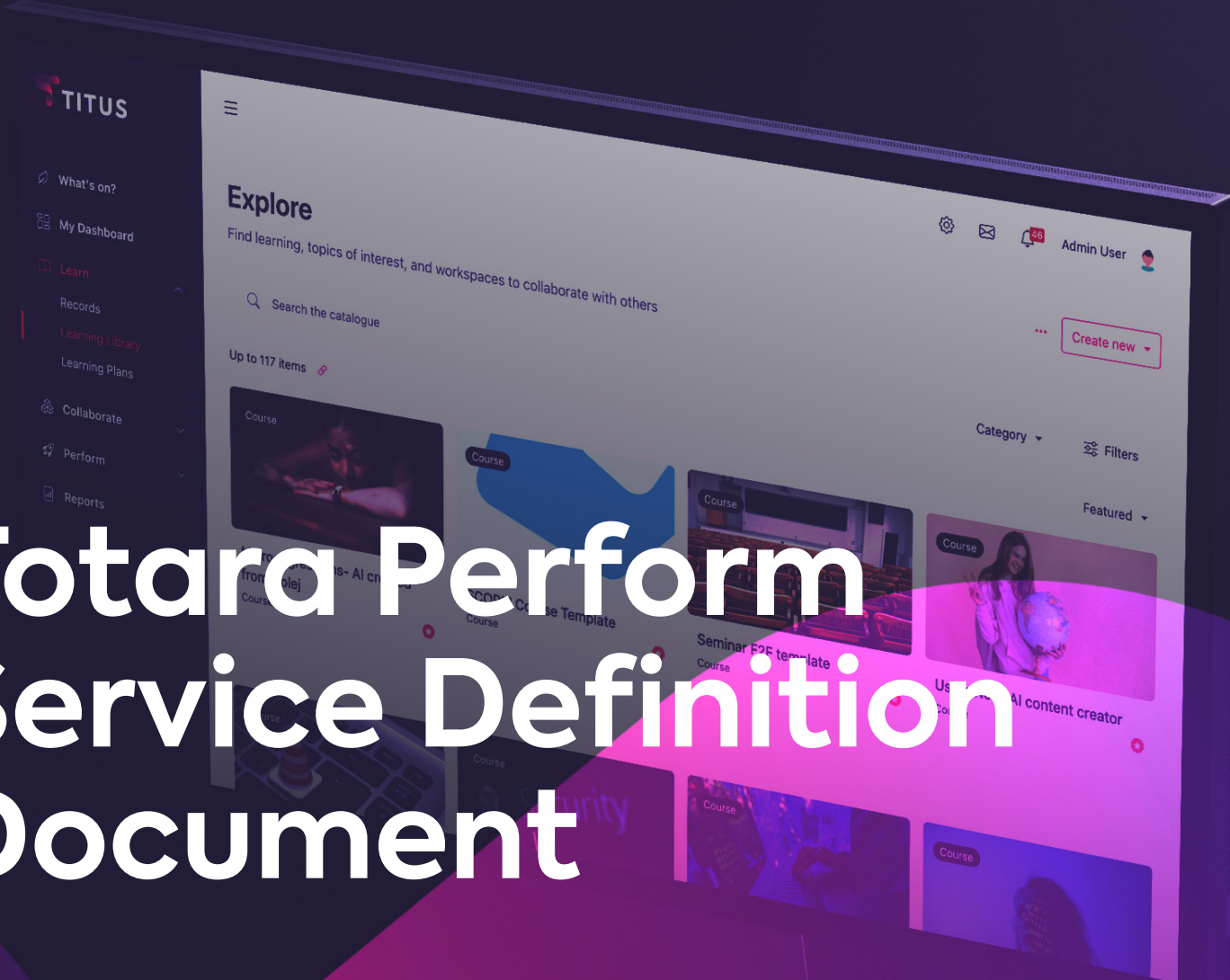




# Totara Perform Service Definition Document

By Titus Learning



## Document Control

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# 1.0 Totara Perform platform overview

# Totara Perform platform overview

Totara Perform transforms Totara Learn, a leading learning management system (LMS) and learning experience platform (LXP) into performance management platform, giving organisations the flexibility to design performance processes that truly fit their culture, goals, and ways of working. Its adaptable framework supports everything from traditional appraisals to continuous feedback, coaching, and capability development, while smart automation streamlines administration so managers and teams can stay focused on meaningful conversations and measurable improvement.

Used by organisations worldwide, Totara Perform provides a configurable, enterprise-grade environment that aligns individual performance with organisational priorities. It brings together goal-setting, skills frameworks, feedback tools, check-ins, and development planning in one cohesive system, ensuring a consistent, transparent, and engaging experience for every employee.

Totara Perform empowers your organisation to:

**Develop:** Build a culture of continuous improvement with flexible performance workflows, regular check-ins, skill tracking, and personalised development plans that help people grow in their roles and prepare for future opportunities.

**Coach:** Strengthen manager-employee relationships through structured conversations, real-time feedback, and collaborative goal-setting that supports clarity, accountability, and ongoing support.

**Align:** Connect individual objectives, competencies, and performance insights directly to organisational strategy, breaking down silos and ensuring everyone is working toward shared outcomes.

**Safeguard:** Manage performance with confidence through WCAG-aligned accessibility, GDPR-compliant data handling, and enterprise-grade security features including role-based permissions, audit trails, and multi-factor authentication.

## Key features

Totara Perform is a flexible, extensible enterprise-level performance platform, designed to support and manage goal-setting, feedback, capability and skill development, and performance conversations across organisations of all shapes and sizes.

### Performance activities

- Create flexible performance workflows, from annual reviews to continuous check-ins
- Support structured conversations between managers and employees
- Capture feedback from peers, mentors, and stakeholders
- Automate reminders, deadlines, and activity assignments
- Track completion of performance tasks across teams and departments
- Provide managers with clear visibility of progress and outstanding actions
- Enable multi-reviewer input for 360° or 180° feedback processes
- Record outcomes, agreements, and next steps directly within each activity
- Maintain a complete performance history for every employee

### Skills development

- Build and manage skills frameworks
- Map skills to roles, teams, or organisational structures
- Identify skill gaps and development needs through assessments
- Link learning resources and development plans to required competencies
- Track completion of skills development activities and compliance requirements
- Generate insights into workforce capability across the organisation

### Goals

- Set individual, team, and organisational goals with flexible templates
- Align goals to strategic priorities, skills, or performance activities
- Enable collaborative goal-setting between managers and employees
- Monitor progress through regular updates and check-ins
- Support cascading goals across hierarchies or matrixed structures
- Report on goal achievement at individual, team, or organisational levels
- Allow employees to add personal development goals alongside role-based ones
- Track goal status, milestones, and completion trends over time
- Use AI goal assist to create SMART goals

## Configuration

- Customise the look and feel to match your branding
- Model linear or highly matrixed organisational hierarchies to intelligently assign learning by role, team, department, or business unit
- Add your own menus and navigation items
- Integrate seamlessly with HR and ERP systems
- Assign and customise system roles and permissions for administrators, managers, and employees
- Engage diverse employees with 37 supported languages
- Improve the learner experience with single sign-on (SSO)
- Support an extended enterprise solution
- Protect your users and their data with GDPR compliance
- Webhooks for pushing data to external systems
- Support for the Excimer debugging tool
- Improve account security with multi-factor authentication
- Set up individual tenants with separate branding and content

## Powerful reporting

- Use a wide range of predefined embedded reports
- Gain detailed insights with custom-built reports
- Ensure managers and administrators stay in the know
- Track completion of skills development, performance management, and compliance
- Export reports and analytics
- Provide managers with user-friendly report dashboards to see key stats and insight at a glance
- Schedule reports to be sent directly to your inbox

## Key benefits

Totara's performance suite provides a powerful set of intuitive tools to drive continuous improvement, meaningful conversations, and measurable performance across your organisation.

### **Adapt to the way your organisation works**

Support traditional, agile, or hybrid performance practices with configurable workflows that reflect your culture and processes; never forcing you into a one-size-fits-all model.

### **Manage performance with minimal disruption**

Streamline performance activities by integrating seamlessly with your existing HCM ecosystem, including payroll, recruitment, and talent management systems.

### **Unlock purposeful performance reviews**

Use powerful visual reporting to identify high and low performers, enabling focused, action-oriented conversations between managers and employees.

### **Align managers and staff through flexible appraisal processes**

Connect individual and team performance to organisational goals by refining or introducing appraisal workflows that are easy to configure and scale.

### **Execute objective appraisals with 360-degree feedback**

Gain a balanced view of strengths, development areas, and opportunities by combining self-assessment with input from peers, direct reports, supervisors, and other stakeholders.

### **Support multiple groups and organisations with multitenancy**

Cater to multiple groups or customers from a single instance of your GDPR-compliant LMS, combining a streamlined admin experience with distinctly branded and isolated user environments.

**Scalable and resilient enterprise delivery**

Proven at scale across global and public-sector deployments, delivering reliable performance for small teams through to multi-organisation, multi-tenant environments.

**Build comprehensive custom reports**

Pinpoint reporting and data that matters to you to track employee development and improve performance. Send automatic email notifications to relevant stakeholders to keep everyone in the loop.

**Easy platform access**

Single sign-on (SSO) supports easy access to your platform with users' Microsoft, Google or Facebook credentials, helping to boost login and engagement rates and lower barriers to learning.

**Works seamlessly with your existing systems**

Easily connects with HR, finance, identity management and collaboration platforms, ensuring performance management fits smoothly into your established digital environment.

**Accessible design**

Support diverse and distributed workforces with WCAG-aligned accessibility, multilingual interfaces, and mobile-friendly design.

## Totara Suite

The Totara Suite brings together Totara Learn and Totara Perform to deliver a unified, end-to-end talent experience platform (TXP). Totara Learn provides the core learning management and learning experience capabilities, while Totara Perform extends this with performance management, skills tracking and analysis, evidence of prior learning support, goal setting, and employee engagement tools.

With social learning and collaboration fully integrated into Totara Learn, organisations benefit from a complete learning platform as standard, with the flexibility to add performance and talent development capabilities through Totara Perform when needed.

Organisations can choose to implement the full Totara Suite for a comprehensive talent experience solution, or purchase Totara Learn and then Totara Perform independently, based on priorities, budgets and digital maturity. Both products share a common architecture and user experience, ensuring seamless integration and future scalability as organisational needs evolve.

## Our Totara services

With our fully managed Totara service, you can concentrate on learning and development, while we handle the technology. From the initial designs, through to the platform configuration and launch, we'll create a platform which meets your precise needs.

Post-launch, we'll monitor performance, track user activity, apply any required upgrades, provide reactive helpdesk support and enhanced early-life support, all with proactive account management. You'll know exactly how your Totara platform is being used, and understand how it can be developed and improved.

### Hosting

We offer a range of hosting options for your Totara platform, including on-premise and cloud-based configurations. We design infrastructure packages to meet your current requirements while ensuring the flexibility to scale capacity and performance as your user base, content and learning needs grow, delivering consistently high levels of reliability and availability. Our managed service includes performance monitoring, upgrades and patches, backups and disaster recovery, data security and real-time reporting. We handle the technology, leaving you free to concentrate on your learning and development strategy.

### Userway accessibility and translation toolkit

Enhance inclusivity and reach with integrated accessibility and translation tools for Totara. We can implement the UserWay accessibility widget, giving learners instant control over text size, contrast, and navigation, alongside predefined accessibility profiles for colour blindness, ADHD, dyslexia, and visual impairment, helping to ensure that your platform is inclusive and compliant for all users.

To support global audiences, we can also embed AI-powered translation directly into Totara, enabling learners to instantly translate content and interface elements without duplicating course materials. Both toolkits are available to purchase separately, offering flexible options to meet your organisation's needs.

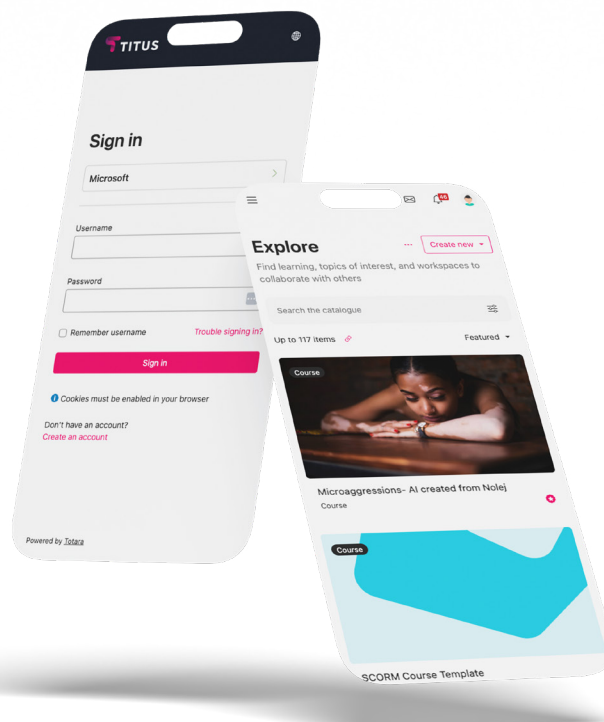
## Totara training

To make the most of your Totara Perform (or Totara Suite) platform, it's vital that all users are confident and comfortable in their use of the platform. Titus provides bespoke training packages for effective and efficient onboarding for administrators and course creators, as well as individual learners. Adopting a blended learning approach, we combine face-to-face sessions with remote training supported by a suite of resources, activities and assessments available through Totara.

## Custom Totara development

We're always seeking to push the boundaries of what's possible with Totara and stay ahead of the latest trends. Starting with the Totara core as a base, our Totara development team can create innovative add-ons to extend the functionality of the platform.

In collaboration with you, we'll draw up a solution design which incorporates each individual requirement of your brief and lays out how the final product might look. With the final concept agreed, we'll combine all the necessary elements into a specification document which outlines each detail of the build.



### **Integrations via API, Workato and webhooks**

Totara provides a flexible integration framework that allows organisations to connect their learning platform with existing business systems and streamline data flows. Through its external GraphQL API, REST services and native webhooks, Totara enables secure, real-time data exchange and event-driven automation with external applications, ensuring learning platforms operate seamlessly within wider digital ecosystems.

Webhooks allow Totara to send instant notifications when key events occur, such as enrolments, completions or certification updates. This enables external systems to react immediately, supporting real-time reporting, compliance tracking and automated workflows without manual intervention. Workato offers an additional low-code integration pathway, providing access to thousands of pre-built connectors for common enterprise systems.

Using Workato, Titus can rapidly and cost-effectively integrate Totara with HR, CRM, identity, communication and analytics tools, reducing manual administration and improving data accuracy across platforms.

Together, Totara's native APIs, webhooks and Workato integrations enable organisations to automate routine processes, eliminate duplicated data entry and improve operational efficiency. Single sign-on (SSO) further enhances user experience by allowing learners to access Totara securely using existing organisational credentials.

## Titus Marketing Support

Titus Marketing Support offers strategic marketing support specifically designed to amplify the impact and ROI of your Totara platform. With our dedicated Customer Marketing Manager, you gain access to expert guidance and execution of impactful strategies aimed at increasing awareness, driving engagement, and optimising platform performance.

Our services include:

**Expert guidance:** Our Customer Marketing Manager will work closely with you to understand your unique goals and challenges, crafting customised strategies to address your specific needs.

**Increased awareness:** Leverage our expertise to effectively communicate the value proposition of your platform, ensuring maximum visibility among your target audience.

**Enhanced engagement:** Through targeted marketing initiatives, we'll help you captivate and inspire users, Improving your branding and driving increased adoption and utilisation of your platform.

**Optimised performance:** Our strategic approach aims to optimise the performance of your Titus platform, delivering measurable results and driving long-term success.



## 2.0 Hosting infrastructure

# Hosting infrastructure

Our Totara solutions are hosted as a managed service in Titus Amazon Web Services (AWS), which provides automated elastic capability to meet varying demand, state of the art security, and best-in-class logging and reporting features, as well as scheduled automated backups and redundancy for disaster recovery.

Solutions are built offline and migrated across and tested before going live. Migration of data from customer legacy Totara sites, if required, follows the same path. Any integrations with existing services are set up and tested against test versions of these services, and then switched to the live version when testing is complete and signed off.

The solution can run in parallel with legacy systems for a transition period if required. As the solution is web-based, there are no major infrastructure changes required by the client. At the application level the solution has the ability to add existing or new plugins to extend its functionality and API integration capabilities where required.

At an infrastructure level as the solution is hosted in AWS, multiple AWS services and APIs can be used to integrate with on-premise and other cloud services for things such as remote monitoring, logging and backups etc. AWS has certification for compliance with ISO/IEC 27001:2013, 27017:2015, and 27018:2014.

## Hosting locations

Multiple locations are available, and we can offer UK only, UK+EU only, or other combinations as required.

## Scalability

Totara has no inherent limitations in terms of size or user bases. The only real constraint on total or concurrent users is the underlying server infrastructure. Our hosting approach removes this risk by using AWS, which automatically adjusts capacity to handle spikes in demand. This ensures stable performance and eliminates the possibility of server overload during normal operation.

# 3.0 Onboarding & offboarding

## Onboarding

Totara is designed to offer an intuitive interface with minimal onboarding time, allow self service for basic user tasks such as password resets, and provide contextual links to help topics including FAQs or forums.

Automated user tours are included within Totara, which results in a lower training overhead as your users are able to navigate the platform features without extra support – something which is not available in many platform offerings.

Our training programmes are bespoke, usually consisting of a blend of face-to-face sessions and online training delivered via Totara, available to all users but tailored to their specific role. Our online programmes are multifaceted, including activities, training resources, webinars and instructional video. Detailed documentation is available online, via the Titus Academy site, and via the Totara Help site and Totara Community.

## Offboarding

At the end of the contract, Titus will extract and securely transfer to you a full backup of the Totara database and any associated user data in a format which allows you to transfer the platform to a new supplier or deploy and manage it in house.

# 4.0 Security

# Security

## Physical security

Our solution is hosted on Amazon Web Services (AWS). Extensive perimeter security measures are provided by AWS, including 24/7 security personnel who are in turn monitored by security supervisors, physical infrastructure including fencing, intrusion detection systems, video feeds and visitor and staff access controls. Equivalent structures are in place at the Titus Learning HQ. Additionally, all Titus personnel are DBS checked and verified prior to induction.

## Information Security Management

Titus operate an Information Security Management System (ISMS) and have achieved ISO27001 Certification.

The directors and management have committed to the development and continual improvement of Information Security and Data Protection by implementing our ISMS, in order to provide:

- Compliance with legal, regulatory and contractual obligations
- Reputation management
- Protection of critical assets
- Compliance with contractual requirements
- Protection of personal data as defined by the Data Protection Act, 2018, and the General Data Protection Regulation, 2016
- Continual improvement of the information security management systems

Titus have also demonstrated robust cyber security controls and procedures, and following audit and testing we have been Cyber Essentials and Cyber Essentials Plus certified.

**Secure data management**

Titus Learning maintains a consistent level of data protection and security across the organisation, and is fully GDPR compliant. All static data (both the database and the Totara data) is encrypted using GDPR-compliant encryption algorithms which provide effective protection against unauthorised or unlawful processing of personal data.

All data in transit between clients and the AWS web server or API endpoints are encrypted by SSL certificates (forcing HTTPS), which provides effective protection against interception by a third party.

The solution also includes functionality to assist the client in meeting their responsibilities under GDPR, including versioning of privacy policies and the tracking of user consents; as well as handling of subject access requests and erasure requests, and maintaining a data registry.

# 5.0 Support, maintenance and SLAs

# Support, maintenance and SLAs

## Service provision

We understand the importance of prompt and reliable service, which is why we're proud to offer our customers 24x7x365 support for any severity 1 incident. Our commitment to excellence means that we're always available to assist you, no matter when you need us.

During normal business hours (8am-6pm on business days), our service levels apply to all incidents. For any severity 1 incident outside of these hours, our on-call service is available via our out-of-hours helpline at 01133 200 346 (or such other number we notify you of from time to time).

We pride ourselves on our ability to quickly determine the severity of any issue reported to us through our support services. In the rare event that you utilise our out-of-hours service and we later determine that the issue does not constitute a severity 1 incident, we reserve the right to charge an additional fee based on our standard support rates. However, we strive to provide the highest level of service at all times and will do everything in our power to resolve your issue promptly and efficiently.

## Service desk expertise

At Titus, our dedicated second-line technical team provides targeted support across all key functions of our e-learning platforms, responding appropriately to the nature of each request or incident. The team also manages our relationships with third-line partner vendors, ensuring we can draw on the latest technologies and specialist expertise whenever required.

Our technical team has a wealth of expertise in infrastructure, including AWS Cloud, Linux, MySQL Database, Nginx, and PHP, all of which are essential to our AWS-hosted platforms and cloud capabilities. Additionally, we have application experts who specialise in supporting specific Totara application functionalities. Our development experts provide custom code and support for existing integrations, and our architect experts enable design support for second-line engineering teams. We also work closely with our vendors, including Amazon Web Services support and Totara Learning.

## **Ticket types**

At Titus, we believe in transparency and clear communication, which is why we want to ensure that our customers fully understand the terminology used in our service-level agreement (SLA).

**An incident** refers to any unplanned interruption or reduction in the quality of our solution. We know that your time is valuable, and we take any disruption to our service very seriously. Rest assured, our team is fully equipped to handle any incidents that may arise and will work tirelessly to resolve them as quickly as possible.

**Change requests** involve the addition, modification, or removal of any function, capability, or component of our solution. We're always looking for ways to improve and innovate, and we welcome your feedback on how we can better serve your needs. Our team will carefully review and consider any change requests to ensure that they align with our high standards of quality and reliability.

**A question** is a formal request for information. We're committed to being transparent and accessible, and our team is always here to answer any questions you may have. Whether you need assistance with a technical issue or just want to learn more about our solution, we're happy to help in any way we can.

## Definitions, examples and targets

|                                 |                                                                                                                                                                                                                                                                 | Standard         |                 | Enhanced         |                 |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|-----------------|------------------|-----------------|
| Type & severity                 | Definitions and examples                                                                                                                                                                                                                                        | Response         | Resolution      | Response         | Resolution      |
| Incident severity 1<br>(High)   | An incident resulting in a total loss of service, or sufficient reduction in functionality resulting in significant financial or reputational damage to the customer.<br><br>Examples include AWS being offline or a security breach.                           | 30 minutes       | 3 hours         | 15 minutes       | 1 hour          |
| Incident severity 2<br>(Medium) | A non-critical incident which has an adverse impact on the customer's activities following the loss of key functionality or multiple features, and no workaround available.<br><br>Examples include: Content unavailable or reporting functionality being down. | 4 business hours | 2 business days | 2 business hours | 1 business day  |
| Incident severity 3<br>(Low)    | An incident resulting in a minor impact on one or more users, resulting in loss of some functionality or features where workarounds are available.<br><br>Examples include where a user cannot log in to the platform or course progress not saving.            | 1 business day   | 4 business days | 4 business hours | 2 business days |

## Out-of-scope incidents

We're committed to providing our customers with the highest quality service, but there are some incidents that fall outside of the scope of our support.

For example, incidents resulting from improper use of our service, system, or product, such as user error, are considered out of scope. While we're always happy to assist with any technical issues you may be experiencing, incidents caused by improper use are the responsibility of the user.

Similarly, events outside of the scope of our service or events beyond our control are considered out of scope. These could include customer network failures, or Force Majeure events, such as natural disasters or other unforeseeable circumstances. While we understand that these incidents can be frustrating, we're committed to being transparent about the limits of our support. Our team will do everything we can to provide guidance and assistance in these situations, but we may not be able to resolve the issue directly.

|                 |                                                                                                                                                                                                          | Standard          |                  | Enhanced         |                 |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------------------|------------------|-----------------|
| Type & severity | Definitions and examples                                                                                                                                                                                 | Response          | Resolution       | Response         | Resolution      |
| Change request  | The addition, modification or removal of any function, capability or component of the Titus solution.<br><br>Examples include the installation or upgrade of a plugin or an increase in server capacity. | 16 business hours | 10 business days | 8 business hours | 5 business days |
| Question        | A formal request for information to be provided (e.g. when a user requests a help article or when there is a query around an invoice)                                                                    | 16 business hours | 10 business days | 8 business hours | 5 business days |

\*Resolutions requiring customer engagement and changes only possible during specific customer-defined windows will have the associated ticket(s), and by extension, the SLA clock, placed on hold.

**Tooling**

Our support services are managed using Titus Learning's ITSM tool and aligned to ITIL v4 processes, specifically Incident Management, Change Management and Request Fulfilment (Question). Users will have access to a dedicated portal to raise tickets and receive status/progress updates.

**Business continuity and disaster recovery**

The AWS architecture will be designed to be disaster resistant by using a multiple-AZ (multiple AWS data centres within the UK) and if agreed a multi-region setup (AWS data centres in other Regions). Multi-AZ setup (London Region) is the standard and most cost effective way to set up an AWS architecture, which will give an AWS SLA of 99.9% or 99.99% (subject to price) availability when we combine the SLAs for each service we will be using.

**Data backup and restore**

Database read replicas will be implemented, which provide backup copies of the database in the event of the master failing. AWS Snapshot Manager will be used to take snapshots of the web file system and database automatically and to retain an agreed number of snapshots e.g. for the previous seven days.

The Totara data will be stored on AWS EFS (Elastic File Storage), which is automatically backed up by AWS. Additional manual or scripted backups can be implemented for the database and Totara data as required.

The backup policy will also facilitate disaster recovery in the event that all servers were compromised by recovering from server and database snapshots. Restoration can be completed as per the Titus Support SLA - for the most critical events this would be within four hours.

# 6.0 Training

# Training

We provide a fully tailored training programme that blends face-to-face sessions where feasible, online workshops, and webinars supported by curated learning materials. Training is delivered through Totara Learn, giving your team hands-on experience with the platform from the very beginning.

Our blended approach includes a wide range of formats such as webinars, seminars, video resources, and interactive quizzes and assessments. For larger rollouts, we can also organise and host user conferences to support wider engagement and promote effective use of the platform. Training continues throughout the duration of the contract, allowing for refresher sessions, onboarding for new staff, and guidance on new features as they are released.

Before go-live, we work with you to create a training schedule that fits your availability. You choose who attends and when, and we take care of the rest. Pricing is based on the number of training days required rather than the number of participants, giving you the flexibility to involve as many team members as needed. A standard training pathway is available, and we can expand or streamline the programme to suit your specific requirements.

Training is available throughout the duration of the contract, based on the number of training days purchased with Titus. If Totara is upgraded and you want to understand the new features, your Account Manager can arrange a session for your team. They can also organise refresher training at any point if you need it.

We offer the following training as standard for the Totara Suite (Totara Learn and Totara Perform):

**System administration**

- User creation
- HR Import
- User profile fields
- User policies
- Tenants and users
- Audiences

**Courses/programs/certifications:**

- Course/category structure
- Course creation
- Program creation and management
- Understanding relationships of users
- Certifications creation and management

**Report builder:**

- Report creation
- Setting a report audience
- Scheduling reports

**Theme management:**

- Login page
- Homepage
- Modifying navigation menus
- Dashboard blocks
- Modifying theme settings

**Workspaces:**

- Creating a workspace
- Adding content
- Adding users and audiences

**Certificates:**

- Certificate construction
- Issuing certificates

**Hierarchies:**

- Departments
- Positions
- Jobs
- Understanding relationships of users
- Manager dashboard view

**Multitenancy:**

- Building tenants
- Tenant management

**Learning content:**

- Activities and resources
- Activity completion and restrict access
- Course gradebook

**Advanced/misc:**

- Competencies and learning plans
- Badges
- Managing plugins
- Site-wide reports

**Overview/intro:**

- General navigation
- Frontpage settings
- Notifications and messages
- Dashboard
- User menu items

**Performance management**

- Creating and managing goals
- Uploading and mapping evidence
- Performance activities
- Skills and frameworks
- Learning plans
- Team reporting

# 7.0 Project management

# Project management

Each of our LMS delivery projects is managed in alignment with the Titus Delivery

Framework, a tried and tested methodology specific to our industry and our clients. No two projects are the same and our flexible approach to the process we follow allows us to tailor each project specifically to that client.

We adapt our approach to suit your needs. Our project management methodology is multifaceted and we combine PRINCE2, Waterfall and Agile methodologies dependent on your requirements.

As standard, you will be assigned an Implementation Lead at project initiation who will act as the main point of contact and who will be responsible for the successful delivery of the project and ensure it meets all of the stated requirements.

Our project team ensures that you are up to date with the progress of the implementation and provide full visibility of the development process. We do this by splitting our projects into measurable, milestone deliverables which require sign-off from the designated point of contact within your organisation. Also, through monthly/weekly progress meetings dependent on your requirements.

Wrike is Titus's chosen Project Management tool. It provides Titus with a central source of truth that eliminates information silos and streamlines project delivery through automation tools and cleanly designed dashboard. By implementing automation, Titus can standardise project intake, ensuring that all initiatives are launched with complete data and automatically assigned to the correct internal team members.

Wrike enables a range of visualisation tools, including interactive Gantt charts and workload charts, enabling Implementation Consultants to balance team capacity effectively while maintaining a clear view of dependencies and tasks. With customer-facing dashboards to maintain transparency on project workflows and deadlines, Titus can accelerate feedback loops and maintain high-quality standards across all deliverables, ensuring every project remains aligned with broader strategic objectives.

This framework enables us to deliver even large scale builds within an average timeframe of 8-12 weeks, assuming timely input from the customer at key review and feedback points. We understand that different organisations have different internal priorities, so while this is a best-case scenario, individual projects may take longer depending on availability on the client side.

### **Account management**

We offer dedicated account management throughout the lifecycle of the contract. Your Account Manager will be responsible for acting as your strategic partner, and will work alongside you to help you meet your aims and goals, whilst also getting the most out of the platform's capabilities. Your Account Manager also represents your voice within Titus to drive forward your product requirements and needs, providing the following:

**Monthly check-ins:** A monthly check-in to provide you with reports on our service-level agreement (SLAs) and platform usage statistics, ensuring that your platform is working as intended. Within this session, we'll also share best practices and review progress against work streams we are collaborating on.

**Quarterly (or bi-annual) strategic business reviews:** Depending on your needs and requirements, you will have a quarterly or bi-annual business review with your dedicated Account Manager - this is your opportunity to share with us your upcoming goals so we can help you to achieve them.

**Personalised success plan:** As part of the strategic review, we'll work with you to create a personalised success plan. This is where you tell us your ambitions and goals with your platform. We'll review these annually to ensure that we're on track to meet each of them.

Our Account Management team is not just a support service; we've founded it on a principle of a true partnership. We understand that every organisation is unique, and we tailor our support to suit your specific needs and objectives. With our team by your side, you can confidently navigate the complexities of managing your learning hub, knowing that you have a trusted partner committed to your success.

# 8.0 Commercial and operational requirements

## Ordering and invoicing process

Buyers can raise an order with Titus by telephone and email with our designated G-Cloud Supplier Framework Manager. You can contact us between 8am-6pm via telephone or email. Once a contract is signed, we will send an invoice to your specified contact within 24 hours with a purchase order number (if provided) in PDF format. Invoices are provided with 28-day payment terms.

## Customer responsibilities

We require our customers to allocate a main point of contact with the following role and responsibilities:

- Liaise between Titus and all departments participating in the project.
- Provide applicable information, data, decisions etc.
- Provide overall work direction and management.
- Help resolve project issues and escalate issues within their organisation as necessary.
- Verify that all responsibilities assigned to their internal stakeholders are performed according to schedule.
- Authorise tasks that impact Titus resource utilisation in a timely manner.

Further responsibilities and obligations include:

- The customer will provide all required information in a timely manner to ensure the swift and expedient delivery of the service.
- The customer will effect and maintain adequate security measures to safeguard the Software and the Customer's Data.
- The customer will comply with Titus Learning's reasonable advice and instructions on operating the Product.
- The customer will ensure that its employees and other independent contractors co-operate reasonably with Titus Learning.
- The customer will permit Titus Learning to use the name and any trademark or logo used by the Customer for the purpose only of identifying the Customer as a customer of Titus Learning and the reasonable promotion and marketing of Titus Learning and its products.

# Technical requirements

The basic technical requirements for Totara Perform are:

**Internet access:** The solution is fully hosted, accessed, and managed through Amazon Web Services (AWS) and requires that the users have access to an internet browser.

**Browser:** Our solution will support Google Chrome, Mozilla Firefox, Apple Safari and Microsoft Edge on desktop, as well as Mobile Safari and Google Chrome on mobile devices.

**Accessibility:** Totara and the Totara Mobile app aim for compliance with WCAG 2.1 Level AA.

## Demonstration sites

To see how our solution could work for your organisation, we offer a free demonstration of the solution. On the demonstration site you will get to see key functionality of the LMS, including the homepage, dashboard, tenants, user management, courses, and much more.

Get in touch with our team to find out more information and book your free demonstration.

# 9.0 Why Titus?

## Why Titus?

Titus is an award-winning e-learning services company, founded in 2013 and headquartered in Saltaire, West Yorkshire. As a startup, agility was a major strength for us. As we've grown, we've maintained an agile approach to everything we do, even as the company has scaled up to support major clients such as the NHS, CNN, and Dermalogica. Today, our client base covers 30+ countries and a range of sectors, including education, corporate, training organisations, public sector bodies and charities.

### Our credentials

To ensure accountability and measurable progress, Titus Learning is a certified B Corp organisation and holds ISO9001, ISO27001 and Cyber Essentials Plus certifications. These accreditations demonstrate our commitment to sustainability, ethical business practices and operational excellence:

**B Corp** accreditation affirms our commitment to high standards of social impact, transparency, and corporate responsibility

**ISO 9001** reflects our focus on continuous improvement, driving streamlined operations and enhanced efficiency across our processes

**ISO27001** certification demonstrates our adherence to best practices in information security, ensuring effective data protection and risk management

**Cyber Essentials Plus** certification highlights our secure and responsible use of technology

Certified



ISO 9001  
Certificate Number  
11304-QMS-001



ISO27001  
Certificate Number  
11304-ISMS-001



## Totara partnership

With Titus, you gain a trusted partner with deep experience in designing, delivering and supporting learning and development platforms. As a Totara Platinum Partner (Totara's highest partner tier), we work closely with the Totara product team and global partner community, giving our clients early visibility of platform developments, direct access to specialist expertise, and assurance that solutions are delivered to Totara's recommended best-practice standards.

We have successfully delivered Totara solutions across a range of organisational contexts. Our team brings expertise across platform configuration, integrations, data migration, user experience design and ongoing managed service support ensuring reliable, scalable and secure deployments.

Rather than offering a one-size-fits-all implementation, we work collaboratively with each organisation to design Totara solutions that align with operational requirements, digital ecosystems and long-term learning strategy. This partnership approach reduces delivery risk, accelerates adoption and ensures platforms continue to evolve as organisational needs change.

# Contact information

For more information on the services and platforms we offer please contact us via email, website, or telephone.

Email address: [sales@tituslearning.com](mailto:sales@tituslearning.com)

Website: [www.tituslearning.com](http://www.tituslearning.com)

Telephone: 01133 200 346

You can also follow us on:

Twitter: @TitusLearning

Facebook: Titus Learning

Instagram: titus\_hq

Youtube: Titus

