

Service Definition Document

Supplier Relationship Management (Proactis)

GCloud15



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About Moore Insight

Experts In Our Field

For more than 30 years, Moore Insight has delivered flexible, high-quality change management, technology, and business advisory services to organisations across both the UK public and private sectors. We specialise in the review, enhancement, procurement, implementation, and ongoing support of Enterprise Resource Planning (ERP).

All About People

People are at the centre of everything we do: our clients, our colleagues, and the communities we serve. Our aim is to develop solutions that inspire and empower individuals and organisations to reach their full potential.

As a member of the Moore Global network, an international association of more than 260 professional services firms across 116 countries, we share a collective commitment to providing innovative, client-focused services that enable organisations worldwide to achieve exceptional outcomes for their customers and citizens.

Delivering Excellence

We have established a strong reputation for enabling meaningful and lasting transformation, guiding organisations through some of the most complex system replacement and improvement programmes within the public sector, including central and local government, higher education, healthcare, and emergency services, as well as across private and not-for-profit sectors.

At the core of our ethos is the belief in truly “making systems work.” We go beyond the technology to gain a deep understanding of the business, operational, and regulatory environments in which our clients operate. As a result, our clients consistently realise measurable benefits from their transformation programmes, such as significantly improved and streamlined ways of working, enhanced financial and management reporting, improved service delivery, and substantial cost savings.

Our Winning Team

We operate through blended, highly skilled teams comprised of both permanent employees and trusted associates, enabling us to draw on a wide range of capabilities and provide the flexibility required to meet each client’s unique needs.

Flexibility Of Resources to Support You

Our core consultancy team is complemented by a network of more than 50 specialist associates. In addition, we collaborate with software providers and consultancy partners across the UK and internationally, ensuring that we can deliver a tailored, comprehensive service to our clients.

Our consultants are hand-selected for their expertise and are committed to working collaboratively with our clients. Through this joint approach, we are able to leverage local



knowledge, strengthen team integration, and promote the exchange of skills and insight. This collaborative model is one of our particular strengths.

From the outset, our specialist team will work closely with you to understand your business needs and guide you through the methodology we apply to achieve the best possible solution.

Meeting Standards of Excellence

To uphold the highest professional standards, we have built a team whose expertise is grounded in both recognised qualifications and deep practical experience. Our consultants hold credentials such as CIMA, ACCA, ICAEW, CIPFA, CIPD, PRINCE2, CISM, and CISA, reflecting the breadth and depth of capability within the organisation. This combination of professional accreditation and real-world experience ensures that the services we deliver are aligned with your business needs and meet the standards of excellence you expect.

Benefits of Working with Us

- We are seasoned practitioners across the professional disciplines that ERP systems support—including accountancy, finance, human resource management, procurement, and payroll—bringing both specialist knowledge and hands-on expertise.
- Our team has extensive experience within the UK public sector and a strong understanding of government structures, operational processes, and the relevant legislative and regulatory frameworks that underpin them.
- We deliver services in close partnership with our clients, working as integrated teams to ensure smooth navigation of business systems and effective knowledge transfer. We take pride in communicating best practice in clear, accessible language that is easily understood by both internal users and external third parties.
- We are deeply committed to unlocking business value from both change management initiatives and technology-led improvements. We are equally comfortable providing part-time strategic and operational advisory support as we are acting as full implementation partners and project managers.
- Quality underpins everything we do and is supported by our accreditations, including ISO9001 for Quality Management Systems and Cyber Essentials Plus. Each engagement is overseen by a designated Client Delivery Director who ensures quality outcomes and high levels of client satisfaction.
- While we are fully equipped to deliver services remotely, we also provide on-site support where appropriate. Our consultants are mobile and able to work across the UK as required.
- We operate as an ethical and environmentally responsible employer and partner. We are recognised as a “Great Place to Work” and are committed to fair and inclusive employment practices, demonstrated through our Real Living Wage and Disability



Confident Employer status. We prioritise prompt payment of suppliers and maintain a zero-tolerance stance on modern slavery within our supply chain.

Previous Experience

You can find testimonials from clients and case studies on our website:

<https://www.moore-insight.com/main-case-studies>

How Our Service Works

Onboarding and Offboarding

Once the service has been commissioned, we will schedule a formal kick-off meeting to introduce members of our consulting team and to meet your key stakeholders. During this session, we will outline the overall delivery approach, confirm expectations, establish communication channels, and address any logistical or administrative considerations such as access to shared workspaces. This introductory phase provides a valuable opportunity for us to gain familiarity with your organisational culture, governance requirements, and preferred working methods.

Upon completion of the project, we will arrange a project closure meeting to verify that all final activities and agreed deliverables have been completed to your satisfaction. This session will include a full handover, documentation of lessons learned, and confirmation of effective knowledge transfer. We will provide a record of the outcomes to support future reference within your organisation. The closure meeting also offers a forum to discuss any follow-on services, transition arrangements, or additional support you may require.

Any additional onboarding or offboarding activities will be undertaken in accordance with the provisions set out within the Order Form of the Call-Off Contract.

What you can expect from us

- We will take the time to understand your organisation's strategic priorities, objectives, and operational context to ensure that the services we deliver are aligned with your core requirements.
- We will apply proven methodologies and recognised best practices, adapting them to the unique needs of your organisation. From Day One, we will undertake a structured discovery phase and work with you to define a transparent and mutually agreed implementation and communication plan, ensuring effective progress monitoring against key milestones.
- You will be assigned a dedicated Client Delivery Director who will maintain regular strategic engagement with your Senior Responsible Officer or Project Sponsor. Where appropriate, they will participate in project boards, manage the client relationship, monitor delivery satisfaction, and serve as the escalation point for any issues not resolved at project-team level.
- We will safeguard continuity of service and maintain quality throughout the duration of the engagement. Consultant time will be scheduled in alignment with your needs, and named resources will be identified at the outset within the project plan. Should a



change in personnel be required, we will ensure replacement consultants are of equivalent or greater expertise and will seek your approval in advance of any change.

- We will provide knowledge and skills transfer throughout delivery to equip your team with the capabilities needed to adopt and manage new systems, processes, or ways of working. This may include joint working, shadowing, and hands-on learning.
- We will deploy and maintain a secure online collaborative workspace for project documentation, communication, dashboards, and reporting, ensuring transparency, auditability, and a single authoritative source of information.

What we can expect from you

- Establish suitable project controls and governance arrangements, including development of a project plan. Where these are not yet in place, we ask that you participate collaboratively during project initiation to define them.
- Engage actively in project activities, including workshops, interviews, consultation sessions, and decision-making points.
- Ensure that key personnel are available in accordance with the agreed delivery schedule and resource plan, and that backfill arrangements are made where appropriate to minimise disruption to business-as-usual functions.
- Provide timely access to business systems, information, data, and networks where required for the successful completion of project deliverables.
- Review outputs, provide feedback, and formally sign off deliverables in alignment with agreed timelines.



Supplier Relationship Management (Proactis)

Proactis

Proactis is an established international business, headquartered in the UK. The company services many industries and about 50% of its total business comes from the UK public sector; it is an extremely important market.

Principle customers are across local government, central government, charities and not-for-profit, higher education, health services, and housing providers.

The solutions Proactis provide are designed, developed, implemented and supported by the company. Proactis has also developed partner network. These partners include resellers, as well as specialist referral businesses.

Proactis' public sector customers can engage with the company in planning the future direction of its solutions.

Overview of Source-to-Pay

Proactis Source-to-Pay is a cloud-based solution and has been designed from the ground up to be commercial off-the-shelf software (COTS). Source-to-Pay (S2P) is a modular, highly configurable platform and the underlying applications require minimal customisation.

Once implemented, users own and manage the system themselves without needing to rely on Proactis as their requirements change.

This diagram shows the full Source-to-Pay solution. It encourages collaboration across departments to streamline processes and bring greater procurement and spend control both internally and with external partners.

Workflow controls, transparency, accountability and auditability reduce risk and provide the added assurance of compliance with organisational processes and access to data for reporting purposes.

S2P helps align procurement and finance departments, as well as enhancing the collaboration with suppliers to better serve the needs of all parties.

Customers can choose to have all or some of the modules deployed together as part of a platform.

Continuous improvement

Proactis is investing substantially in the continued development and improvement of each module. This investment delivers regular product updates; and all customers receive these updates.



Updates may change the user interface and experience, often referred to as UI/UX. They will certainly change various features and functions and add new capabilities.

We will provide buyers, on request, with a history of the functional enhancements that have been implemented since this document was last amended.

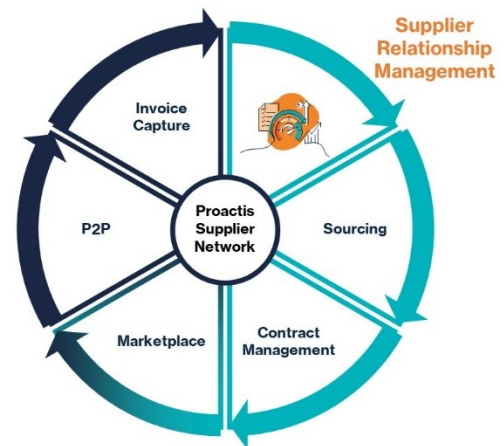


The Supplier Relationship Management module

This document concentrates on the Supplier Relationship Management module. This can be implemented with other Proactis modules to fully meet defined requirements. It will also integrate with other third-party products as may be required to create the correct, complete working environment.

Overview

The Proactis Supplier Relationship Management (SRM) module is a centralised, workflow-driven platform designed to oversee the entire supplier lifecycle, from initial identification and onboarding to ongoing performance and risk management. By automating routine administrative tasks and fostering closer collaboration with the supply base, the module allows procurement teams to focus on strategic initiatives and innovation.



Key components of the SRM module include:

- **Streamlined Onboarding and Qualification:** The system simplifies adding new vendors through automated supplier invitations and self-service registration. It utilises a questionnaire library and sophisticated scoring systems to vet suppliers against specific business rules, such as financial standing, safety standards, and insurance requirements. Suppliers progress through statuses ranging from “pending” to “approved” or “suspended”.
- **Supplier Self-Service Portal:** A dedicated, secure portal that empowers suppliers to independently maintain their own company profiles, manage compliance documentation, such as insurance certificates, and upload promotional content. This self-service model significantly reduces the administrative burden on the buying organisation while improving data accuracy.
- **Performance Management and KPIs:** Procurement teams can track and evaluate Key Performance Indicators (KPIs) - examples include on-time delivery, product quality and cost efficiency - through real-time dashboards and reports. A performance review wizard guides users through standardised assessments, helping to identify high-performing partners and address issues proactively.
- **Risk Mitigation:** The module provides real-time insights into the supply chain by consolidating financial health data and compliance records. Automated alerts and notifications inform stakeholders of critical issues, such as expiring certifications or performance failures, ensuring the organisation remains compliant and resilient.
- **Single Source of Truth:** SRM integrates seamlessly with ERP and Finance systems, ensuring supplier data fidelity across the entire organisation. Bi-directional synchronisation between the SRM module and the ERP vendor master eliminates manual data re-keying and prevents discrepancies.



- **Transactional Efficiency:** The module facilitates daily operations with features like “PO Flip,” which allows suppliers to convert electronic purchase orders directly into invoices within the portal, accelerating the payment cycle and reducing manual entry errors.

In essence, Proactis’ SRM module acts as a digital bridge between an organisation and its vendors, ensuring that only vetted, compliant and high-performing suppliers are used, while providing the transparency needed to drive mutual value in the procurement process.

Principle features and functions

- **Centralised Supplier Directory:** The SRM module provides a structured, unified repository for all supplier information, acting as a “single source of truth” for the entire organisation
- **Automated Onboarding and Qualification:** Procurement teams can use automated invitations and digital workflows to guide new suppliers through selection and adoption processes, replacing manual paperwork
- **Supplier Self-Service Portal:** Through the Proactis Supplier Network vendors independently maintain their company profiles, upload documentation, and track their own transaction statuses
- **Sophisticated Questionnaire Management:** The system includes a customer library of predefined sections and questions to vet suppliers against specific criteria, such as financial standing or environmental practices
- **Rigorous Compliance Monitoring:** SRM tracks critical certifications and documents, utilising a review schedule that generates automated alerts when items approach their expiry date
- **Performance and KPI Tracking:** Users can benchmark suppliers using category-specific Key Performance Indicators and standardised performance review wizards to identify high/low performing partners
- **Bidirectional ERP Integration:** The module synchronises data with Finance and ERP systems to ensure supplier data fidelity, automatically updating approved vendor records across all line-of-business applications
- **Advanced Directory Search:** Users can perform deep searches across all meta-data and classifications to discover potential suppliers for under-resourced categories both inside their existing suppliers and across the entire Proactis Supplier Network
- **Transactional Automation (PO Flip):** Integrated functionality allows suppliers to view/accept digital Purchase Orders and instantly “flip” them into accurate electronic invoices within the portal
- **Multi-Stage Approval Workflows:** Customisable internal workflows can be triggered based on user-defined criteria, such as risk classification or supplier category, ensuring a thorough vetting process

Benefits and outcomes

- **Reduced Administrative Burden:** By empowering suppliers to self-serve and automating routine tasks, the module significantly lowers the clerical workload on procurement and AP departments
- **Enhanced Risk Mitigation:** Proactive monitoring of financial health, performance metrics and compliance data allows for the early identification and documentation of supply chain risks



- **Improved Data Accuracy:** Bidirectional synchronisation and supplier-managed profiles eliminate manual re-keying, reducing information redundancy and the risk of erroneous entries
- **Strict Regulatory Adherence:** The system ensures the supply base remains compliant with legal, safety and environmental standards by proactively tracking audits and certifications
- **Strengthened Supplier Relationships:** Centralised communication tools and transparent processes foster greater trust, collaboration and mutual value between buyers and vendors
- **Informed Strategic Decision-Making:** Real-time data and analytics provide early insights into supplier innovation and performance trends, supporting better procurement strategies
- **Increased Transactional Efficiency:** Features like “PO Flip” and real-time account visibility accelerate payment cycles, reduce errors and drive down enquiries into the AP department
- **Optimised Supply base:** Advanced search tools and the tracking of both existing and potential suppliers help organisations identify the best partners to reduce exposure in high-risk categories
- **Audit Trail Transparency:** Every action, from registration to document approval, is logged with a comprehensive audit trail, ensuring full governance and accountability
- **Greater Supply Chain Resilience:** Ongoing monitoring and standardised reviews lead to improved quality and delivery by ensuring suppliers meet or exceed performance expectations



Implementation

The solution is implemented by an experienced Proactis project team. The team will typically include a project manager, a solution consultant and a technical consultant.



Proactis works with the customer to define and agree the deliverables and will then configure the solution and get it ready for user acceptance testing. Proactis follows best practice implementation processes to ensure that the configured solution reflects the customers' requirements.

Proactis can evidence a track record of delivering its solutions on time and to budget.

Training

Comprehensive training is always provided. This is tailored to meet the customers' needs. There are a range of standard facilities and how these are used is determined during implementation planning. The key components are:

- Train-the-trainer sessions
- E-learning via the Proactis online Training Academy
- Bespoke courses
- Long-term access to continuation learning

Support

Proactis provides comprehensive support services. Core performance measures are:

- Service availability
- Response to service calls



These are covered by our global service standards.

The services are provided on a fully maintained basis which means that the customer will automatically receive all updates to the applications. It also means that the service infrastructure is adjusted to meet increasing demand for the services. All updates and upgrades occur outside of normal working hours.

All customers are provided with a named account manager.

The Service Desk

Customers contact the service desk using the service portal or by email. Services are provided to Proactis customers and to their suppliers. The service portal is open 24x7 and normal working hours are 0900 to 1730, Monday to Friday.

Calls are allocated priorities from P1 to P4, consistent with standard industry practice. There are defined timelines for each call priority and there is a clearly signposted escalation path, should this be necessary.



The Application Managed Service

Our optional Application Managed Service (AMS) has three levels of activity intended to align with different customer requirements. Our experienced professionals work alongside the customer to manage, monitor and optimise the solutions.

AMS packages include a range of enhanced services including access to a monthly bank of consultancy hours which customers can use in different ways. The principal aim is to increase the capacity of the customer's own team.

Service Assurance

Continuity and security of service are extremely important. All software is developed in a highly secure environment. This is audited as part of our company's accreditations.

For production/live running, essential tests are completed annually. These include:

- Application penetration tests
- Disaster recovery testing
- Testing of the business continuity plan

Proactis can issue customer-facing versions of these test outcomes upon request.

Proactis provides appropriate RTO and RPO measures. These are currently 6 hours and 30 minutes respectively.

Policies and Procedures

Proactis maintains fully up-to-date policies and procedures that address software development, information security, privacy, data protection, system access, quality and so on. These policies are available to customers to examine. Customers can also request access to HR related policies including equality, health and safety, confidentiality, etc.



Further Information

For more information about this or any of our G-Cloud services or to discuss your requirements in more detail, please email info@moore-insight.com and we will be happy to contact you.

Please include the following information in your email so that we can get the best people to deal with your request.

- The name of this service
- The name of your organisation
- Your name and contact details
- A brief description of your business situation
- Your preferred timescales for starting the work





MOORE Insight

Moore Insight have been supporting organisations to transform their Enterprise Resource Planning and back-off systems for over 30 years.

We have a strong reputation for delivering true and innovative transformation, having dealt with some of the most complex systems replacement and improvement programmes across the public and private sectors.

Our ethos is to 'make systems work' by going beyond the technology to gain a deep understanding of our clients' business and regulatory requirements.

Our clients have realised benefits from their change programmes including significantly improved and efficient ways of working, better financial and management information, better service delivery, and cost savings.



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