

Human Success Platform - Service definition

Succeed like you.

Everything you need to know to make an informed decision about your learning, engagement, and performance management software provider.

www.essential.co.uk/digital-workplace/microsoft-lms/

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What is the Human Success Platform from Zensai?

The Human Success Platform is a suite of best-in-class learning, engagement, and performance management tools built for Microsoft 365 and Teams; Learn365, Engage365, and Perform365.

Give every employee the learning they need to perform and progress in their role. Boost engagement with regular check-ins and two-way feedback. Support people in performing up against their goals. The synergy of Learn365, Engage365, and Perform365 unlocks the maximum potential of everyone and sets your organisation up for success with:

- Higher employee engagement levels
- Personalised career development plans
- Better performing teams
- More trust and transparency
- Lower staff attrition
- A future-proof workforce



The Human Success Platform is available via the apps in the suite, Learn365, Engage365, and Perform365, in Microsoft Teams, on mobile, and on web.

21%

increase in
productivity

40%

increase in
retention

37%

decrease in
absence



Emma Taylor,
Training and Development
Manager,
Phoenix Software

The weekly engagement, monthly 1 to 1s, training, and personal development plans can all be managed within Engage365 and Perform365, making it much easier for our managers to keep track of their teams' achievements and ensure they are constantly working towards the goals and objectives within personal development plans.

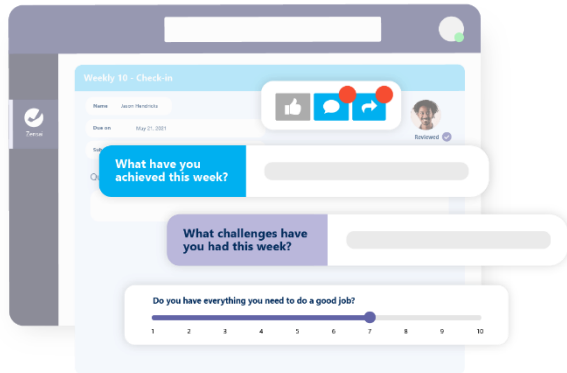
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How the Human Success Platform works.

1

Activate our ready-made templates for regular check-ins, one-on-ones, and performance talks.

Use our suggested questions, agendas, and structures, or create your own.



2

Set up your learning environment with course catalogues accessible via Teams, SharePoint, and our mobile app.

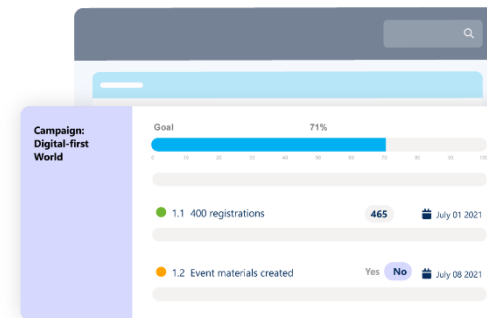
Employ AI or import from our content hub, powered by Go1, to launch courses in moments.



3

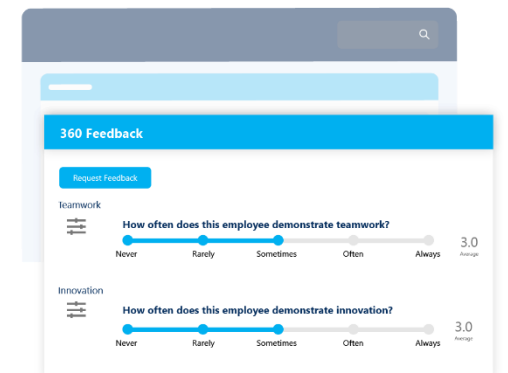
Set organizational goals and empower managers to use them, along with OKRs, for their teams to align with business objectives.

Connect training with goals/OKRs ensuring employee development is aligned to business outcomes.



4

Gather feedback from peers, managers and leaders to give you a holistic perspective for appraisal. Or from external sources for customer or supplier feedback.



How the Human Success Platform works.

5

Begin implementing regular check-ins and conversations across your organisation using the questions, agenda, and format you've established.

You can tailor them for each team.

6

Rely on our flows to enrol the appropriate user groups in relevant training for their role and region, and track completion.

Let learners find training with AI-powered course recommendations.

7

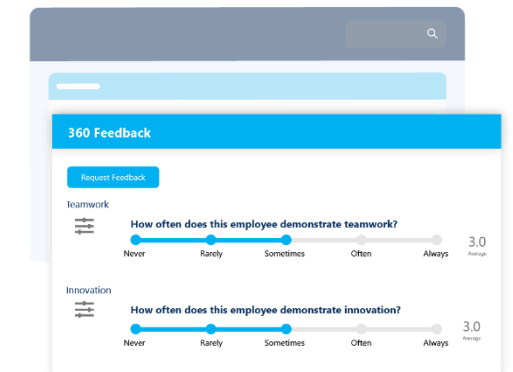
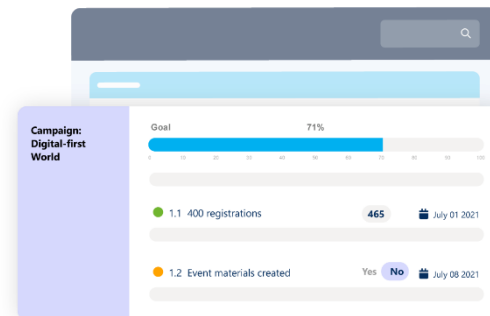
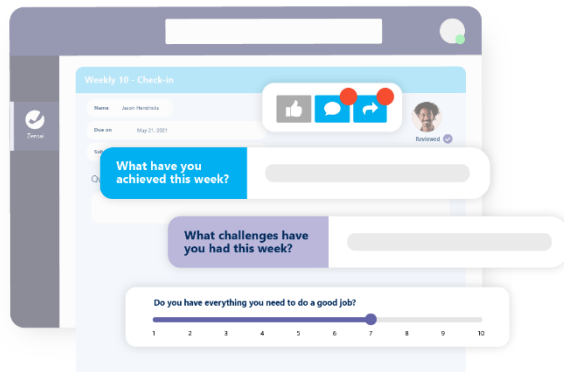
Employees regularly check in with their manager, exchange recognitions with peers and track progress toward goals.

Invitations for periodic one-on-one and performance discussions are automated. Each conversation is informed by learning, engagement, and performance data from the previous period since the last session.

8

Data on employee learning, engagement and performance from across the organization are collected.

Engage365 and Perform365 utilise AI and sentiment analysis to provide insights, assisting you in understanding your organisation's status, predicting employee turnover, mapping future talent needs, forecasting engagement and behaviours, and enhancing team development and performance.



Employee analytics and insights.

Engage365 employee Insights

Engage365 uses artificial intelligence (AI) and machine learning to **read between the lines** of what your people aren't telling you. All while keeping the content of check-ins private between an employee and their manager.

- **Understand engagement levels** using our AI powered 10Pulse model; providing insight into the five key factors of Employee Engagement without the use of a survey.
- **Track sentiment** week to week across different aggregations and groups from qualitative data.
- **Analyse trends** from quantitative questions, turning pulse and check-in questions into measurable metrics.
- **Flexible views for analytics** including filtering by team, region and seniority; aggregation, and time periods.
- **Wide range of visualisations available** including stacked bar, time-series and heatmaps.
- **Attrition prediction** modelling.
- **Strategic succession planning** with integration to Perform365, employ the data for the Perform365 Talent mapping tools.



What you get with The Human Success Platform.

Combining the powers of Learn365, Engage365, and Perform365, The Human Success Platform activates everyday human success and empowers business leaders to create an environment where every employee can thrive and perform.

Learning management

- End-to-end training process automation.
- The entire learning experience presented where people are already logged in and work in Microsoft Teams, SharePoint, Viva Learning, or on their mobile devices.
- Course creation and management.
- Content hub powered by Go1.
- AI powered quiz and content creation.
- Assessments via tests, attendance tracking, and by supervisor.
- Assign learning to Microsoft 365 and Entra ID groups for automatic enrolment in role and region-specific training.
- Search-driven course catalogues for course discovery and self-enrolment.
- AI-powered course discovery.
- Gamification via levels, points, and leaderboard.
- Social learning via Microsoft Teams.
- Skills framework including AI-powered skills generation and skills gap analysis.
- Tracking and reporting of learning engagement and progress.
- Capture of all learning events via LMS365 Audit trail.
- Native integration with Microsoft BI and Power Automate to create custom reports and flows.
- Mobile app with support for downloading content for offline consumption.

Engage365 check-in

- Powerful process that normalises feedback
- Editable range of curated questions
- Ability to create a range of feedback, engagement and pulse questions
- Organisation, department, team and employee level question setting
- Capability to supplement the frequent check-ins with ad-hoc or routine company-wide employee engagement surveys that include anonymous responses and the same set of questions for everyone
- Categorise questions and use hashtags to tag check-in feedback with company values or initiatives
- Managers can comment and feedback and are supported by AI Powered coaching to respond constructively to raised questions and concerns.
- Senior leaders can benefit from our Microsoft Copilot integration getting insights on the organisation sentiment from asking questions in Copilot.

Recognition and visibility

- Employees recognise others using @mention
- Managers can recognise employees and Pass-up successes to the next level manager

Performance management

- Reduce review prep time by 90% with check-in history. Add to that our AI-summarised performance reviews to further diminish planning efforts.
- Run manager/employee 1:1s.
- Run efficient workflow-based processes for all reviews.
- Flexible templating allows wide variety of performance related questions and summarises regular check-ins.
- Capture 360° feedback from internal and external sources.
- Full analytics suite for visualising and analysing performance.
- Talent mapping tools for strategic succession planning.
- Support for end of year corporate processes.

Goals and OKRs

- Create goals or OKRs at organisation, department, team or individual level, giving organisational level visibility.
- Roll-up goals to auto-calculate top level metrics.
- Goal/OKR dashboards provide visibility for senior execs.

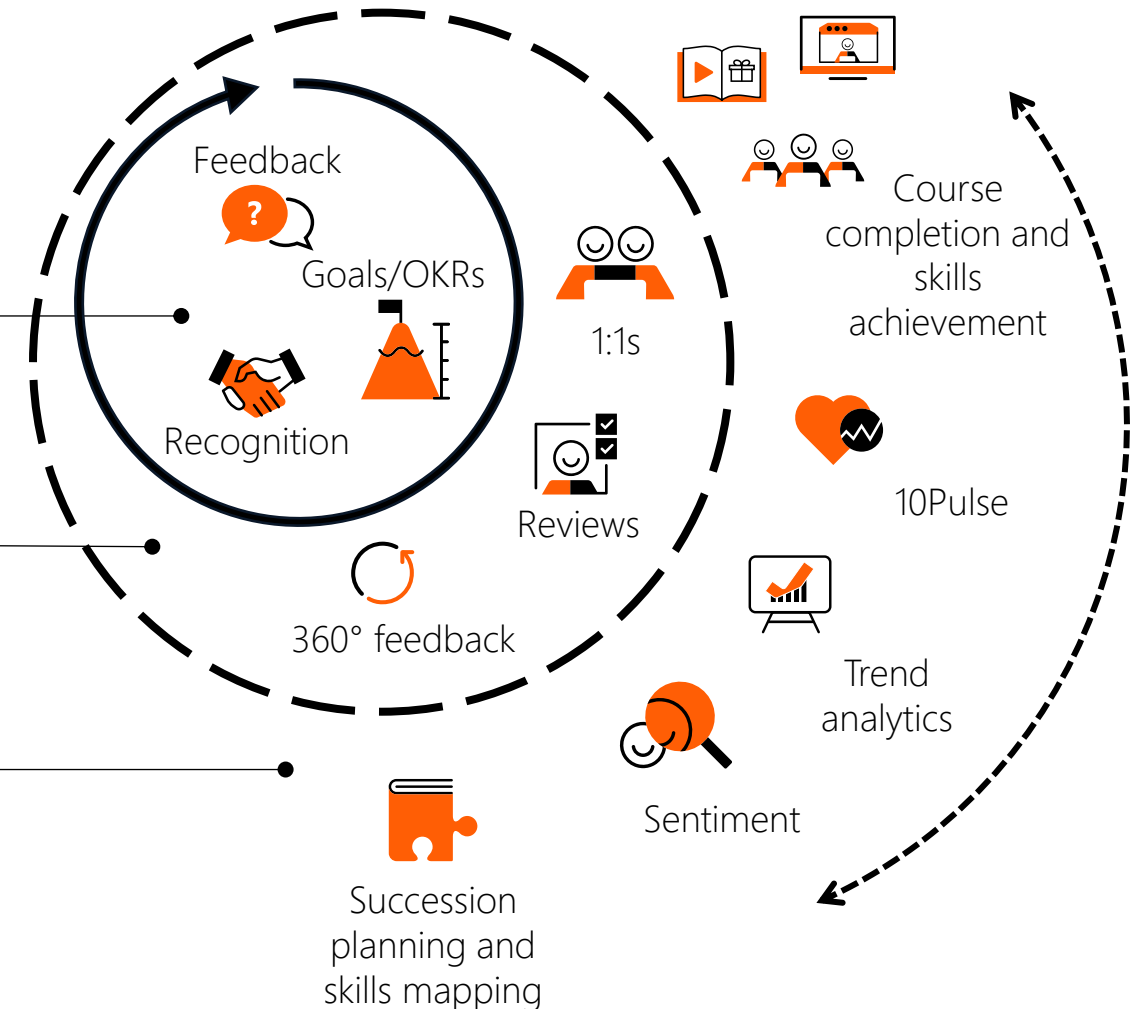
One platform to activate every day Human Success.

1 Frequent check-ins with Engage365: The frequent check-in of Engage365 is the heart of the process and give employees and managers a best-practice feedback framework.

2 Performance and goal-setting conversations from Perform365 become part of everyday employee < > manager conversations in Engage365 check-ins and ad-hoc conversations.

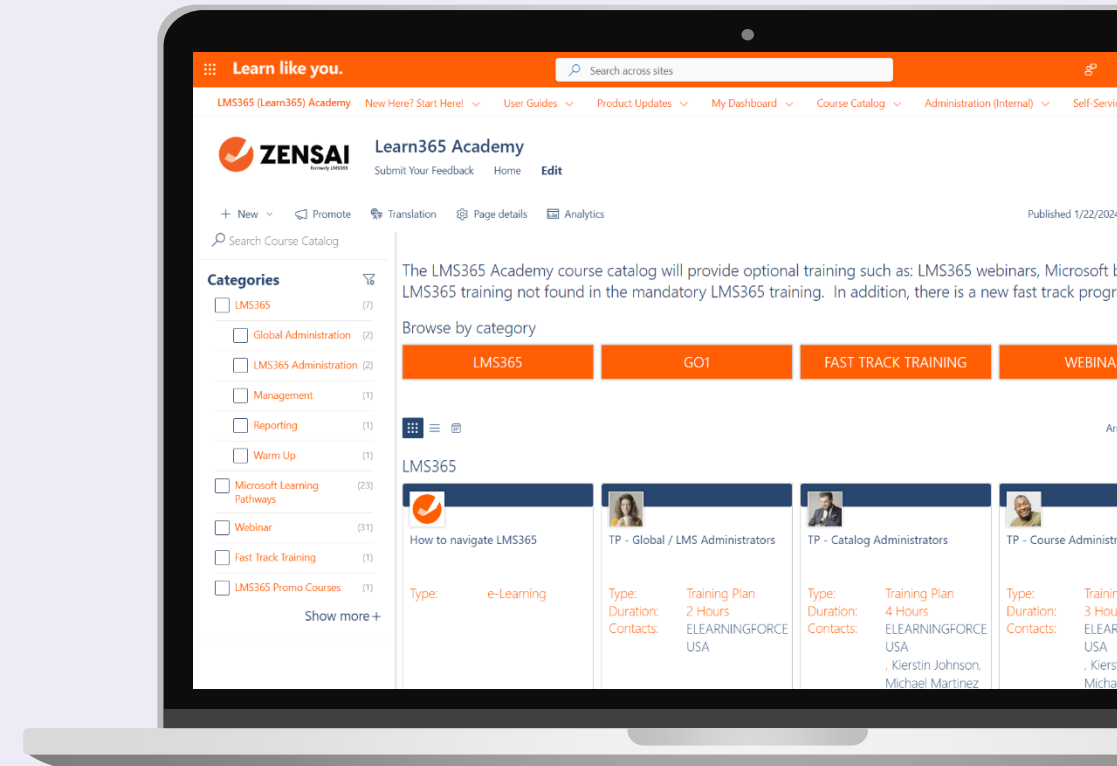
3 Skills achievement and learning from Learn365 is connected to conversations and goal setting.

4 Analytics and dashboards pulls data from across Learn365, Engage365, and Perform365 to give accurate engagement, performance, and talent insights.



Training.

- As part of **Essential's onboarding service**, full training is provided to the team who will be responsible for the delivery and ongoing management of the Human Success Platform for their organisation. *Our training is supported by additional resources from Zensai (depending on success plan) including;*
- Access to product e-learning is included via our Academy. The academy includes training plans for tenant, catalogues, and course administrators.
- An online repository of user guides, documentation, articles, and video tutorials is a great place to start for some straightforward how-to questions that customer teams can use after the remote training sessions we will deliver during the onboarding process.
- The Customer Community offers a platform to share ideas and experiences and reach out to and engage with a large network of like-minded users across many industries globally.



Success plans.

To help your organisation implement the Human Success Platform and experience the full value of the product, we offer three plans that include different levels of support and service.



Success Basic

Access our on-demand tutorials and guides and receive guidance in a number of live sessions.



Success Plus

Everything from Basic, plus guided installation, a selection of add-on solutions, and more live sessions.



Success Premium

Everything from Plus as well as more live sessions and access to additional services.

The **Basic** success plan is included in all subscription plans.

Add-on Solutions for Learn365 available to those with Plus and Premium Success plans*

Power BI starter kit, Power BI solutions, SharePoint Custom Web Part Suite, Learner External Certificate Uploader, Training Plan Updater, Synchronizer, Assigner, Reporter.

More details on all our success plans here:
<https://zensai.com/success-plans/>

Success plans.

	Basic	Plus	Premium
Installation and setup			
Assisted installation of platform services into Microsoft 365 tenant	-	✓	✓
Platform setup and core configuration	-	✓	✓
Platform Launch – Go Live Services			
Project Plan	-	✓	✓
Live Consulting Session	-	Up to 2	Up to 4
Live Customer Success Session	Up to 1	Up to 3	Up to 6
Platform Academy Quick Start Courses	✓	✓	✓

	Basic	Plus	Premium
Lifecycle Services			
Business review session		✓	✓
Live customer success session	Up to 2	Up to 4	Up to 8
Live consulting session		Up to 4	Up to 6
Dedicated Microsoft Teams channel			✓
Additional hours			Up to 16 h
Online academy access for Learn365, Perform365, Engage365	Limited	✓	✓
Online academy self-service user admin		Limited	✓
Customer community	Limited	✓	✓
Maximum support response time	Up to 16h	Up to 10h	Up to 6h

Find more details on our success plans here: [Pick your supportive Success Plan for the Human Success Platform \(zensai.com\)](https://zensai.com/en/success-plans)

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* Add-on solutions for Perform365 are not subject to the Zensai SaaS terms

Onboarding & Service Management.

Learn365



Installation

Workshop
Learn365 deployment
Roll-out plan



Look & Feel

Branding
Customisations



Training

Admin
Course & User Management
Access to Learn365 Academy



Records Migration

Training Records
Certificates
SCORM



PowerBI

Introduction
Packaged Reports



Power Automate

Introduction to Automate
Example Flows



Customer Success

Quarterly User Group Sessions
Bi-Monthly check-in with customer success team

Onboarding and Service Management.

Engage365 and Perform365



Installation

Workshop
Engage365 & Perform365 deployment
Roll-out plan



Look & Feel

Branding
Customisations



Training

Admin
Course & User Management



Templates

Check-in's
Annual Reviews



Goals & OKRs

Introduction
Goals & OKRs



Customer Success

Quarterly User Group Sessions
Bi-Monthly check-in with customer success team

Support & Customer Care from Essential

- Customers have access to our **UK based Support team** for phone, email, and remote support.
- Essential provides a technical support and customer success service to help our customers get the most from the Human Success Platform. This includes unlimited access to technical support and access to the latest versions of the software, as well as proactive sessions with specialists throughout the subscription period.
- Essential customers also benefit from our **quarterly user group sessions**, and periodic education sessions throughout the year. These are free and available to customers on all success plans.
- Support response times for **all Essential customers** are within 1 hour between 9-5pm UK Office hours, Monday-Friday (excluding bank holidays).
- In addition, Essential customers have access to the vendor support service, the response times depend on your choice of success package. Response times for normal severity are
 - Basic: 16 business hours
 - Plus: 10 business hours
 - Premium: 6 business hours
- Further information can be found in the SaaS agreement: <https://zensai.com/saas-terms/>

Service Level Agreements.

Severity Descriptions	
Urgent	Critical production issue including system unavailability affecting all users. No workaround is available.
High	Issue is persistent, affects many users and/or impacts core functionality or results in significant performance degradation. No reasonable workaround available.
Normal	Errors in functionality within the application often accompanied by workarounds or affecting some but not all users.
Low	General inquiries on the use of the application or cosmetic errors or incidents which otherwise do not require immediate attention, rare errors that appear during unusual conditions or are otherwise unlikely in normal use, or errors which have a sustainable workaround.

Basic Plan Service Level Targets*	Severity	First Reply	Resolution/Mitigation ETA
	Urgent	8 business hours	24 business hours or as soon as feasible or practical
	High	12 business hours	As soon as feasible or practical
	Normal	16 business hours	As soon as feasible or practical
	Low	24 business hours	None

Plus Plan Service Level Targets*	Severity	First Reply	Resolution/Mitigation ETA
	Urgent	4 business hours	4 business hours or as soon as feasible or practical
	High	6 business hours	8 business hours or as soon as feasible or practical
	Normal	10 business hours	As soon as feasible or practical
	Low	16 business hours	None

Premium Plan Service Level Targets*	Severity	First Reply	Resolution/Mitigation ETA
	Urgent	0.5 business hours	4 business hours or as soon as feasible or practical
	High	3 business hours	8 business hours or as soon as feasible or practical
	Normal	6 business hours	As soon as feasible or practical
	Low	8 business hours	None

Example Projects:
Delivered by Essential with Zensai
To UK Public Sector organisations



Historic England

