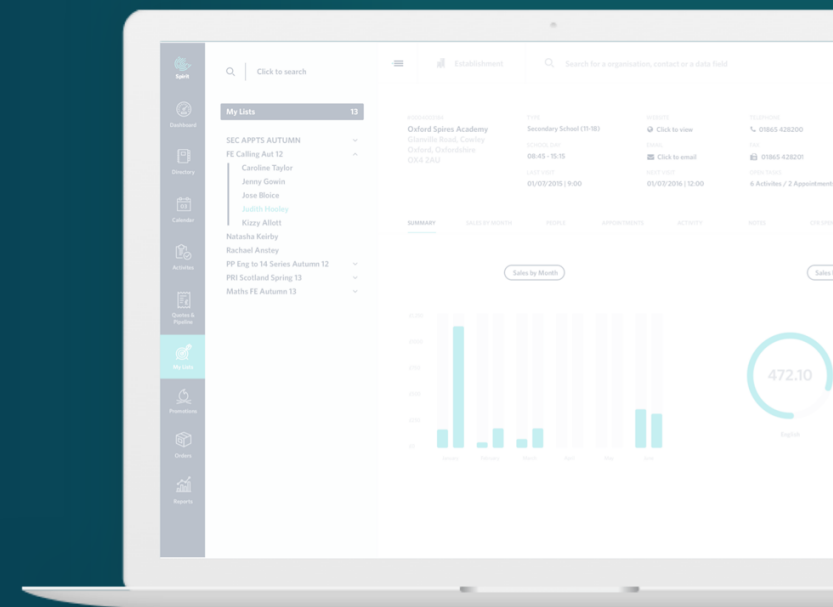


The
Education
Company

SPIRIT

The only CRM & Data management solution
dedicated to education sales, marketing and
relationship management



Contents.

About The Education Company.....3

Our CRM & Data Management Services.....4

SPIRIT – An Overview.....5

Benefits.....6

Education data.....8

CRM features.....9

Marketing features.....11

Preference sites.....12

Reporting & business insight.....13

Data integrations.....14

Data management.....15

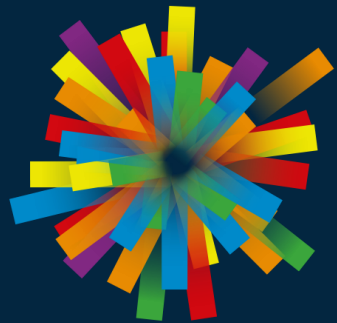
Onboarding support.....16

Ongoing support.....17

Offboarding support.....18

Service definitions.....19





The
Education
Company

About The Education Company.

The Education Company is a **dedicated education CRM, data management and marketing agency**. We have been working with education suppliers, local authorities, charities, CSR programmes and educational organisations for over 35 years.

Our core areas of expertise include **educational data, Business-to-Education CRM, digital marketing, business insight and analytics, market research and website development**. We help clients to organise and use their data to drive their organisation forward by designing, developing and deploying data management and marketing solutions.

Our mission is to help our clients to deliver positive outcomes in the world of education by providing services and implementing solutions that produce a demonstrable return on investment. We have substantial experience working with public and third sector clients, including a range of local authority traded services provided by UK county councils.

Our CRM & Data Management Services.

We offer the following CRM and data management services across our product (SPIRIT) and other customer systems:

- CRM platform (SPIRIT)
- CRM development and configuration
- CRM consultancy and strategy
- CRM requirements gathering and documentation
- CRM system integrations and data feeds
- CRM deployment and implementation
- CRM training
- Data cleansing
- Education data supply
- Segmentation model creation and maintenance
- Business Insight reporting
- Data analysis



SPIRIT – An Overview.

SPIRIT is a cloud-based application that provides education suppliers, local authority traded services and their people with everything they need to manage relationships with nurseries, schools, colleges and multi-academy trusts. It is accessed through your browser and is highly responsive on mobile devices. Key components of the solution include:

- **DATA** – Pre-populated with over 50,000 education organisations and over 400,000 educators' names, roles and contact details, to your required specification.
- **CRM** – Organisation-centric sales, customer service and operational management tools.
- **MARKETING TOOLS** – Segmentation, analysis and data manipulation and extraction tools.
- **INTEGRATIONS** – Integration with a wide range of software platforms.
- **BUSINESS INSIGHT REPORTING** – Intelligent dashboards built in PowerBI to drive data-driven decision making – both 'off the shelf' and custom-built.



Benefits.

You may be considering implementing SPIRIT CRM because you want to...

- Achieve a true single-customer-view across every organisation you work with.
- Instil an organisation-wide customer relationship approach and improve satisfaction.
- Develop and deliver data-driven strategies and remove guesswork.
- Save your employees time and effort by automating processes.
- Deliver more successful retention, growth and acquisition activities.
- Encourage the right behaviours in your teams.
- Understand the education sector better.
- Support the implementation of commercial strategies.
- Introduce a robust and integrated system to run the back-end of your business.

We are solution-led, meaning we try not to 'sell' anything. We work to identify the correct solution to your problem which our customers trust us to implement. The SPIRIT toolkit is forever evolving through consultations with our clients and we very rarely lose a customer. We have clients who have worked with us for over 30 years.





About the SPIRIT platform and our associated services

Education Data.

SPIRIT CRM is populated with a master database of educational establishments and contacts that are relevant to you. Supplementing this is a set of attributes that provide a detailed understanding of every organisation within the database, including academic performance, Ofsted, socio-economics, financials and much more.

This means that there is a **single record for every organisation**, eliminating the risk of record duplication and **vastly reduces your data management overhead**. The data can be used for sales and marketing purposes, including segmenting audiences for the delivery of targeted campaigns.

GDPR tools enable you to protect the rights of data subjects and ensure that you remain fully compliant.

Organisation Data

Early Years

Primary

Secondary

Post-16

Contact / People Data

SLT

Subject Leaders

Back Office

Classroom teachers

Trust Data

Multi academy trust mappings

CEO / CFO data

Demographic Data

Financial income and expenditure data

Academic performance data

Ofsted/Estyn inspection data

Student demographic data

School workforce data



CRM Features.

Sales Pipeline Management



The sales management tools will be configured to support internal and external sales processes. Each user group can have distinct configurations to suit their particular sales cycle/process.

One Customer View



The benefit of an organisation wide solution is the ability to see a complete view of the customer across all touch points. Multiple views are created using graphs and reporting grids to maximize user insight.

360 Alerts



When multiple teams/businesses are approaching the same school/teachers, 360 alerts are essential. SPIRIT CRM has a sophisticated alerts system ensuring all users are aware of what all other users are doing within an account.

Resource Deployment Tools



Tracking the delivery of 'human' service contracts (e.g. consultants) is a commonly experienced challenge. SPIRIT contains in-built tools to track delivery of contracts and to enable you to plan and deploy your teams.

Customer Service



Help desk and customer service solutions/processes can be supported and managed by the CRM. Dashboards and work flow solutions will ensure all customer service interactions are managed seamlessly.

Dynamic Reporting & Insights



Utilising the extensive data mappings and profiling built into the Spirit database, the CRM can provide dynamic insights for sales people, e.g. nearest customer with similar profile – ideal for reference sites and case studies.



CRM Features.

Event Management



If you host and deliver events like training sessions or conferences, SPIRIT will enable you to map attendees and record important data about each person.

Process Automation



With a high degree of configurability, SPIRIT contains all of the functionality to automate CRM processes and increase efficiency across your organisation. Let your data do the hard work!

Appointments and Visits



Track every face-to-face school interaction using the SPIRIT calendar module, which integrates with Outlook and Google Calendar to provide two-way synchronisation.

MAT Relationship Management



Selling to multi academy trusts and other school federations is a key opportunity for education suppliers. Spirit has specific tools designed to support trust wide selling.

Task Management



Create, allocate, complete and measure all the tasks your teams complete on a daily basis with intuitive task lists and automated task creation.

Sales Order Processing



SPIRIT contains all the tools and integration capabilities necessary to drive your ordering and fulfilment processes.





Marketing Features.

List Builder

The Spirit List builder application allows users to create marketing lists using any number of characteristics, from school type or sales history and academic performance. The analysis and reporting tools embedded into the list builder provide marketers with a deep understanding of their target lists ensuring the right message is presented to the right people.

Email Marketing System (EMS) Integrations

Spirit is fully integrated with EMS platforms, including Dotdigital, ensuring 2-way communicating and the sync'ing of Spirit data fields into your EMS for the purpose of driving dynamic content.

Automated Lists

Lists can be automated, allowing e-shots to be created using sophisticated and complex rules seamlessly. This could be a welcome email campaign that automatically goes out to new customers, with tailored messaging depending on the product.

Promotion Management

Our promotion management tool enables marketers to plan, budget and measure campaign performance with ease.

Preference sites.

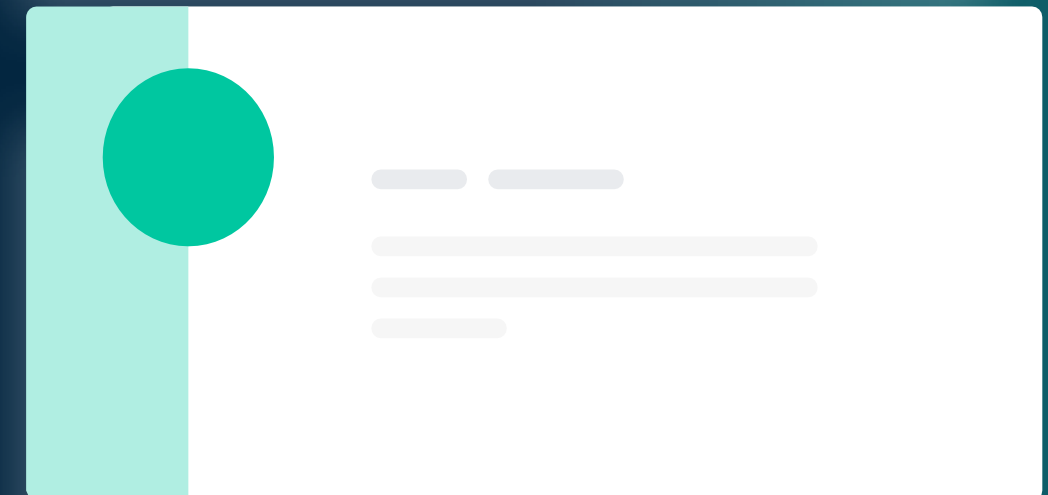
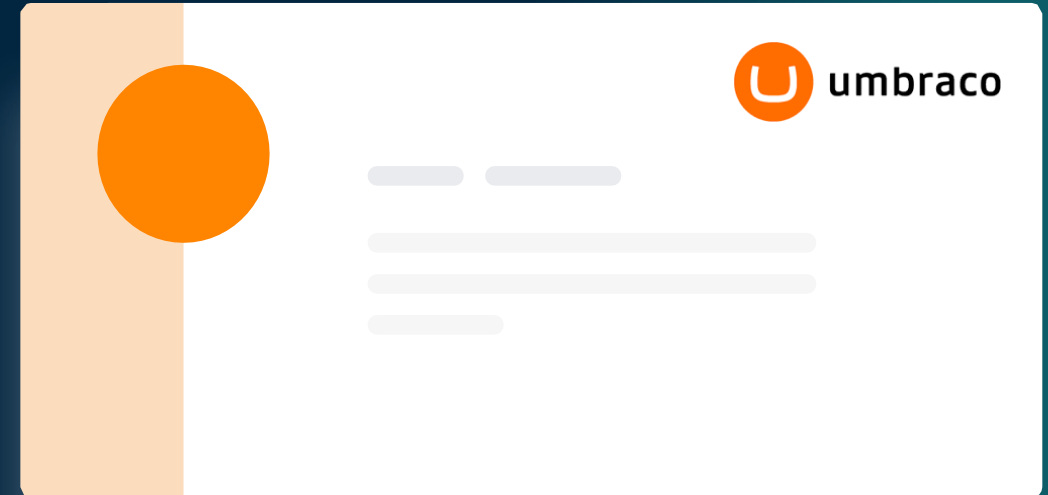
Managing Unsubscribes

Managing unsubscribes across multiple channels and companies/divisions requires a robust and scalable solution. Spirit, working with the CMS Umbraco, provides a multi feature preference management / unsubscribe solution. Features include:

- Embedded unsubscribe links in emails
- Unlimited communicating preferences
- Channel management e.g. Direct mail, Phone etc
- Online portal for data subjects to access and edit their preferences
- Spirit interface for Spirit Users to apply preference for data subject contacting by email, fax or phone

GDPR Compliant – Subject Access Requests

Data subjects can request their data via the portal with the option of automatic access of managed access on the basis of preference site owner reviews.



Reporting & Business Insight.

Understand

The Spirit BI solution utilises **Microsoft Power BI**. Using decision tree algorithms, and factor indexing methods our suite of BI tools provides Spirit users with deep understanding of their customers using the 100's of data profiles Spirit provides for each organisation. E.g. Pupil Premium, Performance Trend etc.

Segmentation and actionable insight

Using the insight BI analysis provides, our support team will help you build marketing and sales segmentation models that enable you to increase retention, customer engagement and new customer relationships.

Monitor

Using existing BI dashboards or building your own bespoke solutions will allow you to monitor the growth of your customer base and their evolving profile giving you the information you need to build success on top of success.



Data Integrations.

Data Sources

Typically data is supplied via FTP into a secure environment. Both DELTA and SNAPSHOT files can be supplied and processed.

Data Cleansing

Organisation and contact data is matched against our education list AND your existing customer data. This removes duplicates and creates a single view of the customer.

Database Layer

The database layer is stored in the cloud with the very highest levels of security as standard. Access to the Azure data is available via VPN and API.

Application Layer

There are multiple applications utilising the single customer view of the data. A typical model includes SPIRIT CRM, a digital marketing platform, Power BI and your website.



Data Management.

Data Mapping

Spirit is a truly end to end 'software as a service' solution. Every Spirit contract includes a data management element whereby our data hygiene team ensure your data is free of duplicates and is mapped to the core Spirit education list allowing you access to a deep level of customer insight.

Deduplication

In the day to day chaos of customer interactions it is only natural that duplicates will appear in your data. Our team are on hand to ensure these duplicates are spotted and removed swiftly and efficiently.

GDPR Compliance

Spirit can be used to support Legitimate interest collection of data. If contact data is added to Spirit under the legal umbrella of legitimate interest, automatic data subject communications can be configured to ensure you remain GDPR compliant.



Onboarding support.

We know that starting up a new service can be daunting, so we provide a structured onboarding process to help users start using the service quickly, confidently, and with minimal disruption. This involves:

- A kick-off session to confirm objectives, users, timelines, and success measures.
- Planning, supporting and delivering data migration, integrations, and the setup of staging and live environments
- Training for administrators and day-to-day users, focusing on practical tasks and real-world client scenarios to ensure users can operate independently and self-serve where appropriate.
- Clear documentation, including step-by-step user guides, video guides, FAQs, and role-specific instructions, all written in plain English and designed for non-technical users.

Once onboarded, you move into our ongoing support contract.





Ongoing support.

User Support

Your contract with Spirit will include unlimited access to our front-line support team. This team will deal with user enquiries and questions ensuring you are fully confident using the software AND the data.

Data Support

Your data support contract will cover a specified amount of data maintenance each month. Data cleansing outside of the contracted levels will incur a small additional charge, but all charges will be agreed in advance.

Account Management

You will be assigned an Account Manager who will support your sales and marketing objectives offering analysis, segmentation and sales pipeline process support and advice. Your account manager operates as your CRM manager and will help ensure your platform is fit for purpose.

Offboarding support.

Our offboarding process is designed to give you confidence that, should you decide to move on, the transition will be smooth, well-managed, and low risk. We take a collaborative and transparent approach to exit, focusing on continuity of service and minimising disruption to your teams and users.

We will work with you to agree a clear and practical exit plan tailored to your needs. This plan will set out key responsibilities, agreed timelines, and any knowledge transfer required to support a successful handover.

Throughout the offboarding period, we will work closely with you and any incoming supplier to progress the exit plan while maintaining service continuity. Standard documentation, system information, and agreed handover support will be provided to ensure a clear understanding of the service and its operation. Access to the service will remain available until the contract end date, allowing time for final operational use and completion of agreed exit activities.

Our aim is to ensure you retain full control and confidence throughout the transition, with no unnecessary barriers to moving forward.

Accessing data upon exit

Your data will be securely returned or transferred to a replacement supplier in an agreed format, in line with contractual and regulatory requirements.



Service Definitions.

Data backup and restore levels:

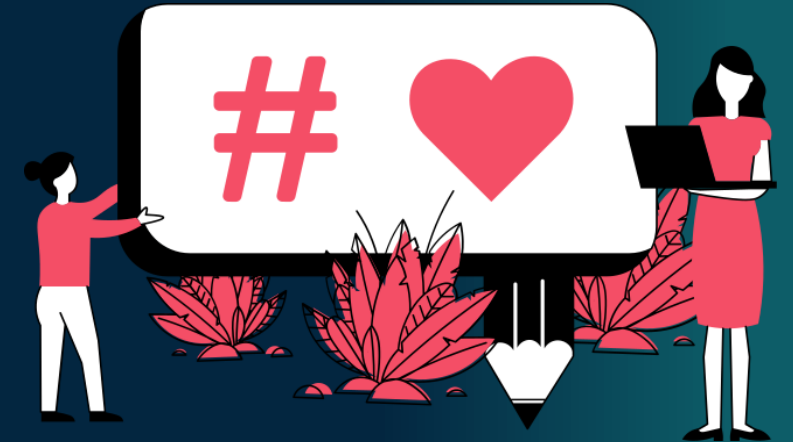
- Hosted in **Microsoft Azure North Europe**
- **Database backups:** every 15 minutes (point-in-time recovery)
- **Infrastructure backups:** daily via Azure Recovery Vault
- **Retention:**
 - Daily: 2 weeks
 - Weekly: 1 month
 - Monthly: 6 months
- **RPO:** 15 minutes
- **RTO:** 4 hours for critical systems
- Regional redundancy within Azure
- Disaster recovery and business continuity processes in place and tested

Service constraints:

We plan maintenance windows during outside of standard business hours and provide advance warning to minimise business disruption.

Hosting options & locations:

- Primary hosting: Microsoft Azure – North Europe
- SaaS, PaaS, and IaaS delivery model
- No on-premise hosting



Service Definitions.

Outage & maintenance management:

- Continuous monitoring via Azure and Cloudflare
- Incidents logged, triaged, and escalated through defined process
- Clients notified promptly of significant outages
- Service credits apply for qualifying extended outages (>72 hours)

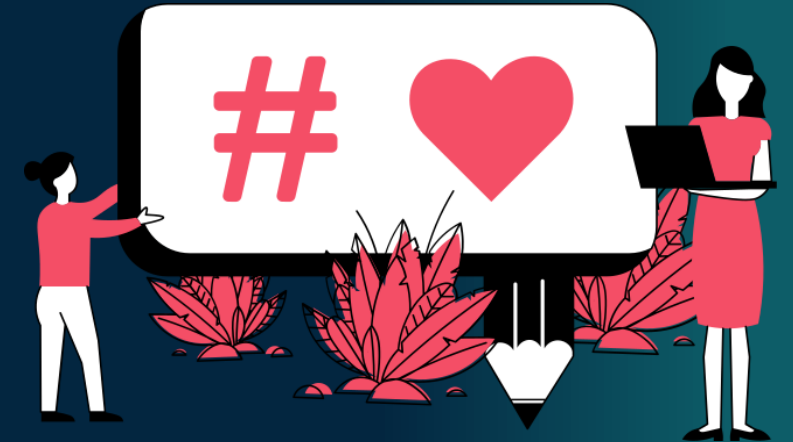
Security notes:

- Cloudflare WAF and DDoS protection
- Barracuda firewall protection for virtual machines
- AES-256 encryption at rest; TLS 1.2+ in transit
- MFA for all administrative access (Duo)
- Continuous vulnerability scanning and penetration testing
- Zero-trust access controls and endpoint protection

Service levels:

- **Availability target:** 99.5% (aligned to Azure SLA)
- **Support hours:** Monday–Friday, 09:00–17:30 (UK time)
- Incidents prioritised (Blocker / Critical / Major / Minor)
- Defined response and resolution targets per severity

Our support desk is available Monday to Friday, 9:00am – 5:30pm



Thank you for reading.

If you have a sales, marketing or data management problem – we will be delighted to help.

For examples of our work, please visit
<https://www.educationcompany.co.uk/portfolio/>



The
Education
Company