

Symplicity *Advocate* Service Definition

G-Cloud 15

SYMPLICITY CORPORATION

4040 Wilson Blvd, Suite 300, Arlington, VA 22203
P: +1 703.351.0200 | f +1 703.373.7032 | www.symplicity.com

Table of Contents

About Symplicity 3

Overview of Symplicity *Advocate* 4

Implementation Strategy and Approach 6

Training Approach 8

Symplicity Support 8

Product Releases & Quality Assurance 9

Security and Privacy at Symplicity 10

About Symplicity

Symplicity is the global leader in innovative technology solutions for Student Services teams across Higher Education. Trusted by institutions worldwide, our comprehensive portfolio empowers universities to deliver exceptional student experiences across every stage of the student journey. Our solutions span Employability & Skills development, Student Wellbeing and Suicide Prevention, Student Conduct management, and Disability Services support—driving meaningful outcomes for more than 40 million students worldwide.

Founded in 1996, Symplicity has grown into a truly global organisation, supporting over 2,500 institutions in more than 40 countries, with offices in Arlington, VA (USA); Hamilton (Canada); Belo Horizonte (Brazil); London (UK); and Brisbane (Australia).

In the UK, our work centres on three mission-critical areas:

- **Ensuring disabled students receive timely, sensitive, and secure support**, enabling every learner to thrive and succeed.
- **Strengthening Student Wellbeing, Suicide Prevention, and Student Conduct** with highly secure, efficient, and student-centred systems.
- **Transforming Careers and Employability**, empowering universities to differentiate their offer and helping students build the skills and confidence to achieve more.

For nearly three decades, Symplicity has partnered with institutions to enhance impact, streamline services, and unlock student success at scale—delivering technology that truly makes a difference.

SYMPLICITY

Global Footprint

Languages Served:

- Arabic
- English
- French
- Portuguese
- Spanish



Overview of Symplicity *Advocate*

Creating Safer Campus Communities

Greater awareness of mental health, sexual harassment, hate crime and online abuse has led to a significant increase in reported cases across the higher education sector. Movements such as #MeToo have heightened public and media scrutiny, bringing institutional responses to these issues into sharper focus.

Universities are operating within a complex and evolving legal and regulatory framework, including contract and consumer law, duty of care obligations, health and safety legislation, equality and human rights requirements, and data protection legislation. Institutions are expected to demonstrate that they are taking proactive, proportionate and consistent action to ensure students are safe, supported and treated equitably.

The legal position is clear: higher and further education providers must actively work to protect students while they study. Universities UK has reinforced this expectation through a series of recommendations, highlighting the importance of treating student safety, wellbeing and conduct management as strategic priorities.

The Case Management Challenge

One of the most significant challenges facing universities is that case management typically spans multiple departments and professional services teams. Historically, institutions have struggled to share relevant information appropriately without compromising confidentiality, security or data protection requirements. As a result, many universities have relied on ad-hoc processes, disconnected systems or general-purpose CRM tools that lack the structure, governance and access controls required for effective and defensible case management.

Symplicity *Advocate* – Purpose-Built for Higher Education

Advocate is Symplicity's Enterprise Case Management solution and the only platform built specifically for Higher Education from the ground up. It is used by more than 300 universities globally to support case management across a wide range of areas, including wellbeing, student support, residential life, student money advice, sexual misconduct and harassment, serious misconduct, complaints and academic integrity.

For over 25 years, Symplicity has worked with universities, continually developing *Advocate* in collaboration with the *Advocate* Community to reflect best practice in wellbeing and conduct case management.

Responding to Sector Pressures

Social and ethical expectations to create safer campus environments have led many universities to prioritise more robust, transparent and auditable case management solutions. Symplicity supports institutions in transitioning from siloed or CRM-based approaches to a more formal, strategic and secure model using *Advocate.* This enables universities to respond effectively to sexual misconduct and harassment concerns, rising volumes of student support needs driven by cost of living, and increased scrutiny of internal conduct processes.

Built in Partnership with the Sector

Advocate is developed and enhanced in collaboration with members of the *Advocate* Community to meet new or evolving institutional requirements. All enhancements are delivered as part of the core solution, ensuring shared benefit across the community and avoiding the complexity of bespoke CRM configurations. This approach provides a sustainable, future-ready platform aligned to sector needs and regulatory expectations.

Supporting Student Wellbeing Through the CARE Network

Advocate recognises that universities must not only respond to complaints, appeals and misconduct, but also proactively care for and support their student communities. This led to the development of the CARE Network, which enables institutions to capture concerns about students who may be at risk and require additional support for mental health, financial hardship or academic engagement. By enabling earlier intervention, the CARE Network supports improved student outcomes and retention.

Following the COVID-19 pandemic, universities experienced a sharp increase in support requests, many requiring personalised action plans across multiple departments. *Advocate* enables reliable tracking, allocation and reporting of these actions, ensuring students receive timely support and that no concerns are overlooked.

An online reporting form allows anyone to raise a concern, enabling student wellbeing and support teams tp gain a consolidated view of students who may be at risk and are equipped with the tools to follow up in a coordinated, personalised and effective way.

Beyond Traditional Case Management

Advocate delivers more than traditional case management by providing a 360-degree view of student engagement. This holistic visibility enables institutions to identify patterns, manage risk proactively and enhance the overall student experience.

Case Management Capabilities

Each case type in *Advocate* has its own configurable workflow, with access restricted to nominated business units. Case categories typically include:

- Behavioural Misconduct
- Academic Misconduct
- Preventative Care
- Discipline and Appeals
- Campus Security
- Complaints Handling
- Sexual Assault and Harassment

Where appropriate, cases can be referred between teams by promoting the original case to a secondary case type. This allows each business unit to manage its own process independently, while maintaining a clear link between related cases.

In other scenarios, controlled access can be granted to additional staff or teams on an individual or group basis, with optional time and date restrictions.

Role-based, system-driven security ensures confidentiality through automated access controls, significantly reducing institutional risk and reliance on manual confidentiality agreements.

Complete Case Records and Communication

Throughout the lifecycle of an incident, *Advocate* supports structured communication with respondents, complainants and internal stakeholders. Each case is supported by a comprehensive case file, providing a single, auditable record that includes:

- Meetings
- Provisions and precautionary measures
- Sanctions
- Academic adjustments
- Letters
- Emails
- Appeals
- Documents
- Case notes

SYMPLICITY advocate

Implementation Strategy and Approach

Symplicity has extensive experience delivering state-of-the-art, web-based solutions for Student Services, successfully deploying *Advocate* at more than 300 universities worldwide. Our team brings unparalleled technical expertise to help institutions meet—and exceed—their strategic objectives.

Our implementation approach follows four clear phases, beginning with:

Phase 1: Discovery and Planning

Purpose-built for Higher Education and shaped by over 25 years of collaboration, *Advocate* is grounded in global best practice. The Discovery and Planning phase establishes a clear understanding of the university's goals, current processes, data needs, and required outcomes.

During this phase, Symplicity consultants will:

- Map existing business processes and identify opportunities to streamline workflows, improve administrative efficiency, enhance staff and student experience, and strengthen reporting.
- Develop a configuration plan to align *Advocate* with the university's operating model while identifying areas for innovation or improvement.
- Facilitate a structured series of remote workshops (up to three days) covering strategic objectives, operational requirements, and detailed process reviews.

Strategic Review

- Workshops will explore:
- Current challenges and desired improvements
- Short- and long-term objectives and success indicators
- Key stakeholders and organisational structure
- The evolution of existing processes
- A full product orientation and solution walkthrough
- Development of a Project Management Plan outlining milestones, activities, and expected outcomes

Information Gathering

Activities include:

- Reviewing relevant documents and artefacts
- Conducting end-to-end process mapping aligned to university requirements
- Identifying data captured across all business processes to configure online forms and system fields
- Defining integration requirements, including:
    - Student Information System imports
    - Timetable and faculty data feeds
    - Student photo imports
    - Single Sign-On configuration (Shibboleth, ADFS, SAML2, LDAP, CAS)
    - Calendar synchronisation (Office 365, Outlook Exchange or Google)
    - Migration of essential historical data

By the end of the Discovery and Planning phase, all stakeholders will have a clear understanding of project objectives, timelines, and deliverables. Initial training and solution orientation provide familiarity with *Advocate* and confidence in its capabilities. This phase typically spans two to four weeks, including preparation, workshops, follow-up analysis, and reporting, with technical integration continuing into Phase 2.

Phase 2: Building and Learning in Production

Symplicity's Role

During Phase 2, Symplicity configures *Advocate* based on the requirements gathered in Phase 1. This includes setting up all prioritised modules for go-live and progressing technical integrations. Our consultants remain available throughout to answer questions and support stakeholders as they work through the online training modules.

The University's Role

University staff—both business users and end users—complete our online self-help training modules, which provide the foundational knowledge needed before live training sessions in Phase 3. These modules typically require 2–3 hours per user per week and cover the features prioritised for go-live.

By the end of Phase 2, *Advocate* will be configured to align closely with the university's needs, and users will have a solid understanding of the system's core capabilities. This phase usually spans two to five weeks.

Phase 3: Training and Testing to Go-Live

Phase 3 focuses on reviewing the configured solution with university stakeholders, refining it collaboratively, and preparing users for go-live. Regular Training and Testing Sessions—delivered remotely by your Implementation Manager—build on the online learning completed in Phase 2 and focus on university-specific workflows and requirements.

System Review and Training

Working sessions are scheduled around the university's availability and include end-to-end walkthroughs of the configured business processes. Sessions are held via video link to support remote access, recording, and future reference. Symplicity adjusts configuration in real time based on feedback.
After each session, university stakeholders update their own templates and data within the system.

Template & Data Configuration

Certain elements of *Advocate* are managed directly by the university, including:

- Letter and email templates
- Lists and picklists
- Resource library content
- User groups and security permissions

These are created or refined as each business process is reviewed. At the end of Phase 3, the university is fully prepared for go-live. This phase typically requires two to five weeks.

Phase 4: Go-Live and Beyond

The final phase focuses on readiness for launch and ongoing post–go-live support. Not all modules are required for the initial rollout; additional modules can be introduced later with guidance from your dedicated Client Manager.

Training Approach

With over 25 years of implementation experience, Symplicity has found that 'flipped classroom' or 'train the trainer' education is the most effective method for long-term success. Our goal is to train key staff and super-users to be comfortable using and updating the system on their own. After training, staff should be able to manage day to day operations independently and train other members. Symplicity has found that this approach fosters ownership, reduces reliance on Support, and builds long-term sustainability. Our training strategy is embedded throughout the implementation process to include:

- Phase 1 – General orientation and guided product walk throughs of business process. This training is delivered over a series of focused working sessions.
- Phase 2 – Completion of online training modules. End users will access Symplicity's online training modules and resources which contain insightful instructional videos and user guides covering important system functions. Detailed system knowledge will be gained across all modules during this phase.
- Phase 3 – Business process and workflow review with applied institution-specific system configuration. This is the final component to the training strategy where each business process will be reviewed end-to-end with the newly applied configuration.

Symplicity Support

Symplicity Help Centre

Symplicity Support includes unlimited access to the Symplicity Support Center for duration of the agreement. The Symplicity Support Center is a personalized ZenDesk platform, a top-tier online support management solution for technology companies and one of the best support solutions available today. ZenDesk serves as a web portal for Symplicity service, support, and access to training materials and resources. Clients will also be able to view any open tickets for current status and may also add any additional information to reach a resolution to an issue. The portal can be accessed directly from the user interface and is available 24/7.

Symplicity Support Center user guides are designed to provide clients with comprehensive information and step-by-step instructions on how to use their platform effectively and troubleshoot any issues they may face. These guides typically include:

- **Platform Overview:** General introduction to the platform's features and functionalities.
- **Feature-Specific Guides:** In-depth explanations of each feature – use, best practices, troubleshooting.
- **Workflows and Processes:** Guidance for workflows, automated tasks, and optimized support processes.
- **Troubleshooting Guides:** Common issues and solutions to help users resolve problems.
- **Customization Options:** Platform customization options to fit specific needs and branding.

Symplicity Help Desk

Clients also have access to round-the-clock telephone support through the Symplicity Help Desk, which operates 24/7. System Managers can contact the Help Desk for all ongoing support needs, including troubleshooting, general enquiries, and routine account management. Our Help Desk is staffed by experienced professionals who respond promptly to calls and ensure issues are resolved efficiently.

Client Manager

Clients will be assigned a Client Manager (CM). The CM is a system expert and provides oversight on the account and works with clients to resolve issues, ensure quality of service, provide additional training support, offer guidance on best practices, and help to optimize processes to ensure our clients get the most out of our solutions. The CM is the personal point of contact for our clients, providing expert assistance readily available for any need, from implementation to day-to-day operations.

Product Releases & Quality Assurance

At Symplicity, we recognise that delivering exceptional software is not solely about innovation—it is about ensuring reliability, security, and an outstanding user experience. For this reason, we follow a rigorous Product Release and Quality Assurance programme designed to uphold the highest standards.

Streamlined Deployment Process

Our innovation begins with feedback from our clients, ensuring development is guided by real needs. Every release follows a carefully managed deployment process, with code undergoing extensive testing at each stage—development, testing, staging, and finally production. This disciplined approach guarantees that each version of our software meets the highest quality benchmarks before it reaches users.

Comprehensive Quality Assurance

Quality Assurance is embedded in our development culture. Our dedicated QA teams rigorously test every feature, identifying and resolving issues early to ensure the product performs exactly as intended. Strong QA practices ensure our software consistently meets and exceeds customer expectations.

Excellence in Regression Testing

To maintain system stability, we perform thorough regression testing with every release. Previously validated features are retested to ensure that new enhancements do not introduce unintended issues. This meticulous process preserves the integrity, reliability, and performance of the software throughout its lifecycle.

A Customer-Centric Approach

Our customers are at the heart of our product strategy. We actively gather user feedback and incorporate it into our roadmap, ensuring that enhancements deliver genuine value and improved usability. Innovation is always aligned with the strategic needs of our client community.

A Commitment to Quality

Quality is a core principle at Symplicity. Our Product Release and Quality Assurance programmes reflect our firm commitment to delivering solutions that are not only innovative and feature-rich but also robust, secure, and dependable.

Experience the Symplicity Difference

Join the many institutions that trust Symplicity with their mission-critical systems. Our collaborative product planning ensures innovation remains aligned with client priorities, while our rigorous QA processes provide continuity, reliability, and confidence in every release.

Security and Privacy at Symplicity

At Symplicity, we recognise that privacy and security are of paramount importance in today's digital landscape. As a trusted provider of solutions for higher education institutions and employers, we are committed to safeguarding the confidentiality, integrity, and availability of user data through robust, industry-leading privacy and security programmes. Symplicity is audited annually by independent third parties for ISO 27001, SOC 2 Type II, and NIST 800-53 (moderate), ensuring your data is protected in line with global best practice.

Data Protection and Privacy Compliance

Symplicity adheres to the highest standards of data protection, fully complying with the UK General Data Protection Regulation (UK GDPR) and all relevant privacy legislation. We ensure that personal data is handled lawfully, transparently, and with the greatest care.

Secure Infrastructure and Technologies

Our infrastructure is protected by advanced security controls designed to prevent unauthorised access, breaches, and emerging threats. We employ industry-leading encryption, secure authentication methods, and continuous monitoring tools to maintain system integrity and safeguard sensitive information at all times.

Proactive Threat Detection and Response

Security at Symplicity is proactive and preventative. Our dedicated security team performs regular assessments, penetration testing, and vulnerability scanning to identify and mitigate risks early. In the event of an incident, our comprehensive response protocols ensure swift containment and remediation.

Privacy by Design

Privacy is built into every stage of our product lifecycle. From concept to deployment, we apply privacy-enhancing technologies, data minimisation principles, and granular access controls. This "privacy by design" approach ensures responsible and ethical data handling across all Symplicity solutions.

Transparency and Accountability

We uphold transparency as a core principle. Clear privacy policies, terms of service, and data processing agreements ensure users understand how their data is collected, used, and protected. Regular third-party audits and certifications further demonstrate our commitment to accountability and compliance.

Partnering for Success

We view privacy and security as shared responsibilities. By collaborating closely with our clients and partners, we foster a culture of trust, continuously refining our policies and controls to address evolving threats and regulatory changes.

Experience Peace of Mind with Symplicity

Join thousands of institutions and employers that rely on Symplicity's secure, privacy-focused solutions. With our comprehensive privacy and security programmes, you can be confident that your data is protected to the highest standard.

For further details, please visit www.symplicity.com/compliance.









