

Workbie Service Definition Document

1. Overview

Workbie is an all-in-one Business Management Suite designed to help organisations streamline operations, improve efficiency, and manage daily business activities from a single platform. Built for flexibility and used across a wide range of industries, Workbie combines CRM, job management, HR, operations, communication tools, stock control, and reporting into one cohesive system. The platform is fully customisable to meet unique business workflows, ensuring companies do not have to change their processes to fit the software.

2. Core Services Provided

Workbie offers a comprehensive suite of services that support business operations from customer engagement to job completion, staff oversight, and ongoing reporting.

2.1 Customer Relationship Management (CRM)

- Lead and prospect management
- Customisable sales pipelines
- Kanban deal views
- Quotes, invoicing, and payment tracking
- Email/SMS client communication

2.2 Job & Project Management

- Job creation, planning, and scheduling
- Staff allocation and shared team calendars
- In-app job instructions and customer sign-off
- Image uploads, attachments, and notes
- Projects module with boards, sprints, and Gantt charts

2.3 Task Management

- Daily to-do lists
- Priorities, comments, and attachments
- Overdue task visibility
- Time logging for accountability

2.4 HR & Workforce Management

- Employee profiles and access management
- Holiday requests and approvals
- Overtime logging and work hours tracking
- Clock-in/clock-out system
- Live fire register for safety compliance

2.5 Stock, Products & Supplier Management

- Product creation and tracking
- Supplier management with pricing details
- Contract and service records
- Full stock oversight for purchasing accuracy

2.6 Communication & Marketing Tools

- Integrated email system
- SMS templates, group messaging, and marketing campaigns
- Customer interaction history stored centrally

2.7 Customisable Dashboards & Access Control

- Role-based permissions
- Custom dashboards oriented by user role
- Staff-level vs management-level access structures

2.8 Reporting & Analytics

- Real-time operational reporting
- Productivity, job progress, and sales metrics
- Exportable reports for management and auditing

2.9 Integrations & Custom Development

- Integration with third-party systems
- Custom workflow creation to match business processes
- Migration support from legacy systems

3. Support Services

Workbie provides a structured support service to ensure users receive fast, clear, and high-quality assistance.

3.1 Incident and Issue Reporting

- Users can report issues via the in-built ticketing system or by contacting support by phone.
- All incidents are triaged, prioritised, and assigned to the appropriate team.
- Predefined workflows for common issues ensure timely resolutions.
- Full incident reports are provided upon closure.

3.2 Maintenance and Updates

- Regular system updates and improvements
- Fast deployment of security patches
- Scheduled maintenance windows communicated in advance

3.3 Account & Access Management

- User access controls and permission structures
- Secure verification before discussing account matters
- Monitoring and logging of administrative actions

4. Security & Compliance Services

Workbie integrates strong security controls throughout the platform.

4.1 Vulnerability Management

- Continuous monitoring using firewalls, logs, and alerting systems
- Assessment of vulnerabilities based on risk and likelihood
- Patch deployment within 24 hours for high-risk issues
- Routine updates for lower-risk vulnerabilities

4.2 Protective Monitoring

- Continuous monitoring for suspicious activity
- Immediate investigation of unusual behaviour
- Rapid response to confirmed compromises
- Documented remediation and follow-up actions

4.3 Access Restriction to Management Interfaces

- Role-based access controls and least-privilege principles
- Multi-step authentication for admin tools
- Strict staff authorisation for support operations
- Regular access reviews and permission clean-up

5. Customisation & Industry Adaptation

Workbie adapts to the business rather than forcing businesses to adapt to it. Through configurable modules, flexible workflows, and bespoke development where required, Workbie serves multiple sectors including:

- Gyms & fitness centres
- Police & Ambulance
- NHS & Medical Professionals
- Education Facilities
- Councils & Planning
- Hospitality
- Salons & wellness
- Manufacturing and fabrication
- Building trades and construction
- Warehousing and inventory-based businesses
- Property and estates management
- Service-based industries

6. Delivery Model

Workbie is delivered as a fully managed SaaS platform with:

- Cloud hosting
- Continuous monitoring
- Automated backups
- High availability infrastructure
- Scalable performance for growing businesses

7. Benefits to Clients

- Centralised business operations
- Real-time communication across teams
- Reduced duplicated work and admin tasks
- Greater visibility and accountability
- Improved customer experience through seamless processes
- Strong security foundations and reliable support
- Custom Bespoke Modules written for clients needs

