MHR

G-CLOUD 15 LOT 2b, SaaS HR, Payroll and Finance Software and Services

SALES EXECUTIVE: Mary Watkinson

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By Appointment to
His Majesty The King
Supplier of Payroll and HR Systems
MHR International UK Limited
Nottinghamshire

Contents

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1 THE COMPANY

1.1 Background

MHR is a privately owned UK company established in 1984, specialising in the development, implementation, and support of HR and payroll software and services. We work with major organisations across the public sector, including local authorities, central government, higher education, health, and emergency services, as well as a wide range of commercial sector. Our solutions are underpinned by advanced analytics to deliver targeted insights that enable informed decision-making.

In addition to software, MHR provides comprehensive outsourced payroll services, ranging from payslip printing and distribution to full payroll processing and fully managed payroll solutions.

The company has grown steadily and now supports more than **1,300 customers** and employs over **900 staff**. With a dedicated focus on HR and payroll, MHR is one of the largest independent software houses in the UK. Our operations are based at the MHR Campus in Ruddington, Nottinghamshire, which includes a secure, state-of-the-art data centre supporting our SaaS and outsourcing services.

Since our formation, we have demonstrated consistent financial stability and growth. This strong position enables continued investment in customer support, service quality, product enhancement, and new product development.

MHR is committed to delivering high-quality payroll and HR solutions, complemented by a full portfolio of specialist training, implementation, and support service, ensuring our products continue to generate long-term value for our customers.

Our Product Portfolio

iTrent - Launched in 2001, iTrent is our flagship fully integrated HR and payroll solution. Designed, built, and continually enhanced by our in-house engineering team, iTrent provides industry-leading payroll, HR, talent management, and analytics capabilities. Highly configurable and functionally rich, it supports a wide range of public sector organisations, including Local Authorities, Central Government Departments, Blue Light Services, Schools, Colleges, and Universities. Its strengths are in its configurability and functionality, which means we can cater for both simple and complex public sector requirements.

People First - Launched in 2017, People First is a Saas, next-generation global HR, Payroll and employee engagement platform developed at our Nottingham campus. It is designed to put the employee experience at the centre of organisational strategy and supports modern working practices. People First provides an intuitive, social-media-inspired user experience and integrates with a best-in-class ecosystem of partner technologies. The platform enables organisations to build stronger working relationships and adapt to evolving workforce expectations.

MHR colleagues would happily discuss your unique needs during the sales process and will suggest which product would be best suited to meet your organisations challenges.

1.2 Quality Management

We place great emphasis, under the governance of the Board of Directors, on quality. MHR is approved by the Lloyds' Register Quality Assurance to the ISO 9001:2015. Documented procedures cover all functions within the company as part of the corporate business information system (BIS). The BIS is applicable to design, development, installation, maintenance, and support of commercial and business solutions, including consultancy and customer training. It is also applicable to the provision of HR outsourcing services for the operation of commercial software and support of business processes. The responsibilities are defined in MHR's published quality manual as follows:

- The chief executive provides full authority with regard to implementation and compliance of the quality management system within MHR.
- The Board, in association with other directors, reviews on a regular basis the quality policy, its objectives and the performance against its goals.
- The quality manager has the responsibility for ensuring that the quality management system is implemented effectively by management. This does not absolve everyone else from the responsibility of implementing the system effectively.
- All process owners and managers must ensure the quality management system is effectively implemented in their area.
- All staff must ensure that the work that they and other staff carry out is of the highest quality and aspires to the aims of the quality policy and its goals.
- MHR hosts regular customer forums where customers are invited to meet and discuss issues or impending releases. User comments are recorded using a Quality Record Document.

Quality management review meetings are held on a Quarterly basis. Measures identified by managers and detailed in the quality manual are provided to the quality manager on a quarterly basis and are presented at the quality management review as a report. This report also includes any recommendations for improvement from any member of the management team.

Where issues arise, we have extensively documented escalation procedures and quality process to ensure a speedy recovery for our clients. Communication is very important to ensure the client is briefed on the situation. This can be either by phone calls or emails, or by the client logging into our web site and accessing the call logging system where progress on their fault is logged and updated by the service desk staff. Where dissatisfied, customers may escalate issues to their customer relationship manager, head of customer relations, customer experience director and ultimately to the chief services officer.

1.3 Security Accreditation

MHR has certification to the ISO/IEC 27001: 2022 Information Security Standard for all locations and operational areas. The independent, external, 3-yearly full recertification and 6-monthly surveillance assessments are undertaken by BSI.

MHR is SOC2 accredited. SOC2 reporting and control framework is audited by KPMG to the international ISAE3402 standard, this ensures independent assurance on a rolling 12-month cycle.

MHR is also Cyber Essentials plus certified.

1.4 Experience

MHR is proud of our prestigious customer base. These include diverse public sector organisations such as the Powys County Council, The Shaftesbury Group, London School of Economics, The Salvation Army, UK Parliament, Leeds City Council, The Senedd, Scottish

Parliament, The British Legion, Crown Office and Procurator Fiscal, Scottish Courts & Tribunals, The British Library and Historic Royal Palaces.

Whilst we are the foremost supplier in the public sector, we are also proud to have a range of blue-chip companies who use our software and services and whom we support to the highest standards. Our strong public sector client base includes all levels of authorities including Central Government, county, unitary, borough and district councils. We also serve many police and fire authorities and have a strong presence in the academic sector supporting universities and colleges.

2 ITRENT HCM SOLUTION

iTrent is a single database, web-based system spanning HR, talent management, workforce management and payroll. Once-only input of data removes the risk and inefficiencies of data duplication and enables an organisation to store all its people data in one place creating 'one version of the truth'. This is key to the provision of an effective, efficient and professional service.

Our software and services provide organisations with the tools and functionality to manage the entire employee lifecycle using cost effective and compliant methods whilst supporting a best practice approach. Its flexible configuration options can support a shared service, devolved or combined method of human resources delivery.

The provision of self-service in conjunction with workflow and authorisation functionality offers the potential for significant process efficiency gains.

As a truly date-effective solution provides access to point-in-time data and reporting. Even more importantly, back-dated and future-dated changes can be input and processed with minimal effort.

2.1 HR software

Our HCM software provides organisations with the tools and functionality required to manage the employment of personnel using the most cost effective, process efficient and compliant methods. It sits as the hub module to the whole solution: a single, web-based software solution spanning HR, talent management, workforce management and payroll. It incorporates management functionality designed to support a shared service, devolved or combined method of human resources delivery.

This capability, along with manager and employee self-service, workflow and authorisation functionality, delivers the potential for significant process efficiency gains, leaving HR personnel free to focus on more strategic human resources activities which have more impact on workforce optimisation. It enables organisations to:

- Achieve proven cost savings from process efficiency gains.
- Structure their HR service delivery in the most effective way.
- Ensure that HR practices comply with corporate, regulatory and legal standards.
- Produce management information which supports strategic decision making.

Features of the software include:

- Organisation structure management - enabling terms and conditions, pay and benefits and role requirements to be set at any point in the structure and cascaded down.
- Fully automated starter, transfer and leaver processing - enabling employee appointments to flow directly from the recruitment module.
- Automated correspondence - for HR tasks such as contract generation and changes to contract
- Diversity and establishment monitoring - allowing powerful overviews of the make-up of the workforce.
- Key date tracking and reminders - ensuring that time critical HR tasks such as renewals, appointments, review dates etc. are automatically prompted and visible.
- Disciplinary and grievance management - enabling the stage processing and case management of this sensitive area.

- Work permit, license and background checks - recording, monitoring and reminder prompts ensure governance compliance and risk management.
- Employee and manager self-service with workflow and multi-tier authorisation processing - enables achievement of proven cost savings from process efficiency gains.
- Over 170 standard reports.

2.1.1 Organisation structures and charts

Structures

iTrent has been designed to support the full range of current and leading-edge operational models for an organisation, from traditional static structures to project teams, virtual teams, shared services and hierarchy management (i.e. the system offers functionality to report on various hierarchical structures such as an employee's manager in terms of day-to-day management, the manager responsible for signing of annual leave, the manager responsible for PDR, details of where the employee is funded from, etc.)

The graphical organisation structure plots business units and roles, along with their attributes. The solution can easily manage complex organisation structures as the definition of the structure forms the spine of the system.

As part of the implementation, we will have a meeting with you to discuss how wish your structure to work and be designed. During this session we will outline the different options available. Each organisation has different requirements, however an example of the options available are:

- Have all the units within one organisation structure and use different units for each company. This means that all the set-up is in the same organisation, and you can end the unit if changes occur for example if one-part leaves. This is useful for where the setup is the same (e.g. same T&Cs, attend learning etc.), or if they have a lot of similarities. This then saves time in building and maintaining the structure.
- Have each organisation as different structures within iTrent. This is useful where the set up and configuration is very different. For example, if different T&Cs apply and each company does not want to use anything from the main organisation (learning, T&Cs, payrolls, reporting managers, recruitment). This is generally used where they are a separate entity.

Within each example the separate organisations are defined using units, posts, positions etc., allowing you to define your structure to multiple levels. Unlimited levels can be held. Advanced security profiles ensure that users only have authorised access to the required organisation. Statutory returns are created per organisation.

As the organisations are treated discretely, parameters are amended separately for each organisation. Users may amend structures, posts, employee data in one organisation whilst other users amend the parameters and data in other organisations. User access determines data accessibility, from organisation down to the lowest data level.

There are no limitations to the complexity and number of levels the structure can hold. We have many higher and further education establishments as our customers all using this tool to represent their organisation structures.

Charts

The dynamic charting tool draws automatically on the data in the system. This presents the user/manager with a highly interactive set of charts that allows them to drill down into further information. They create a live view of your organisational structure and allows them to view where employees sit within the structure. The charts are produced automatically based on the employee data held, ensuring that they are always a true reflection of your organisation's structure. Charts also indicate if the employee is out of the office.

The charts show both reporting lines and the organisation structure and are presented in one of three views:

- traditional view, showing each employee or structure item as a card. These cards are then linked together to show the reporting hierarchy.
- sunburst view, showing each person/structure item as a segment in a series of expanding rings. The further from the middle the segments are, the further down the reporting line that person/item is.
- treemap view, showing each person or structure item as a tile, each within the person/structure item it reports to, like a mosaic. The higher up in the treemap a tile appears, the higher up the reporting hierarchy that person or item is. The larger a tile is the more repartees it has.

The user can then select parameters to determine how they want the charts presenting. The charts are highly interactive and allows users to view the organisation as a whole or drill down into business areas. Users are also presented with summary information when they hover over individuals.

Employees can also view an organisation chart within employee self-service. This allows them to see the entire organisation structure and where they sit amongst other employees. It displays employee name, job title and employee photograph.

Employee view of organisation chart

2.1.2 Case Management

The system has configurable case management functionality that provides the following:

- configurable case lifecycles
- user types (e.g. manager, HR, administrator) can raise and access case progress if permissions are defined.
- support for any case type, e.g. disciplinary, grievance, H&S incident and whistleblowing.

- definition of a case owner and case participants, as well as configurable workflow actions and events
- a case summary form which provides a view of all cases raised that the user is permitted to access.
- an individual case summary screen allowing users to easily review all stages defined.
- the ability to flag and lock cases.
- triggered workflow actions, notifications, correspondence, and reminders to assigned case owner and participants.
- creation of template letters for cases using the mail merge functionality
- the ability to add case notes and supporting documentation.
- exporting of a case file including all attached documents
- dashboard functionality
- employees can raise a case via employee self-service and they can also view the status of any cases they are involved in.

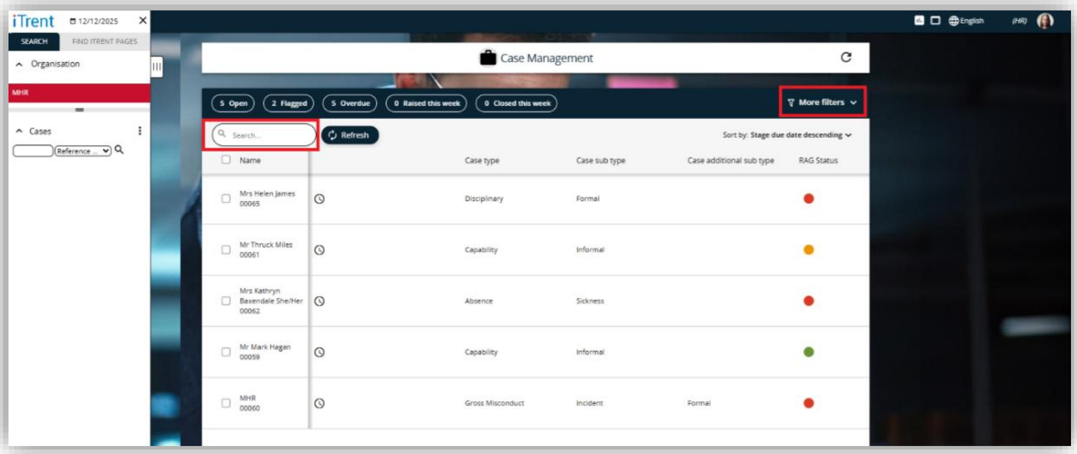
The case management functionality allows for lifecycles to be designed. These can consist of several different stages and will show each phase that the case is required to move through before a resolution is reached (i.e. case raised, interview, review, outcome etc.).

This enables a different approach to be defined dependent on the case type, i.e. grievance, disciplinary etc. Each stage of the lifecycle can also have a timescale or SLA applied to it. For example, 5 days for the initial meeting, 2 weeks for the investigation, 6 months for the outcome etc. These are configurable and can be defined in line with relevant company policies and procedures.

A case summary form is provided for authorised users, giving a central area to review all raised cases that they are permitted to access and/or update.

Facilities include:

- highlighted figures at the top to identify the number of open, overdue cases etc.
- the ability to search and filter by case type.
- create a new case management lifecycle.
- raise a new case.

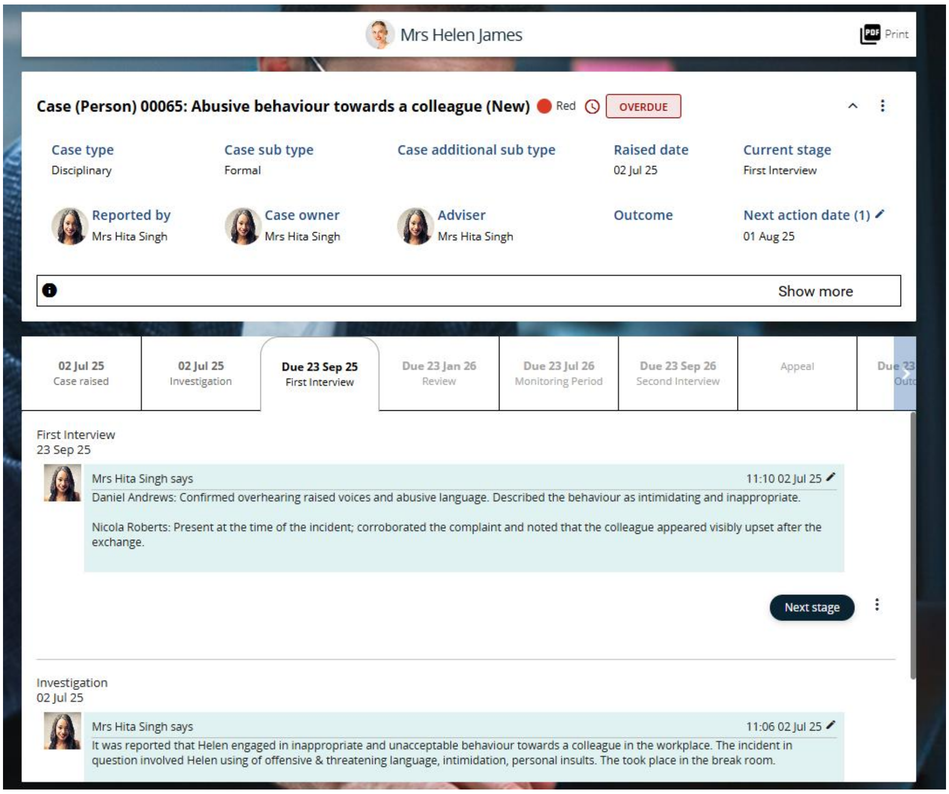


Case management summary screen with search and filter functionality highlighted.

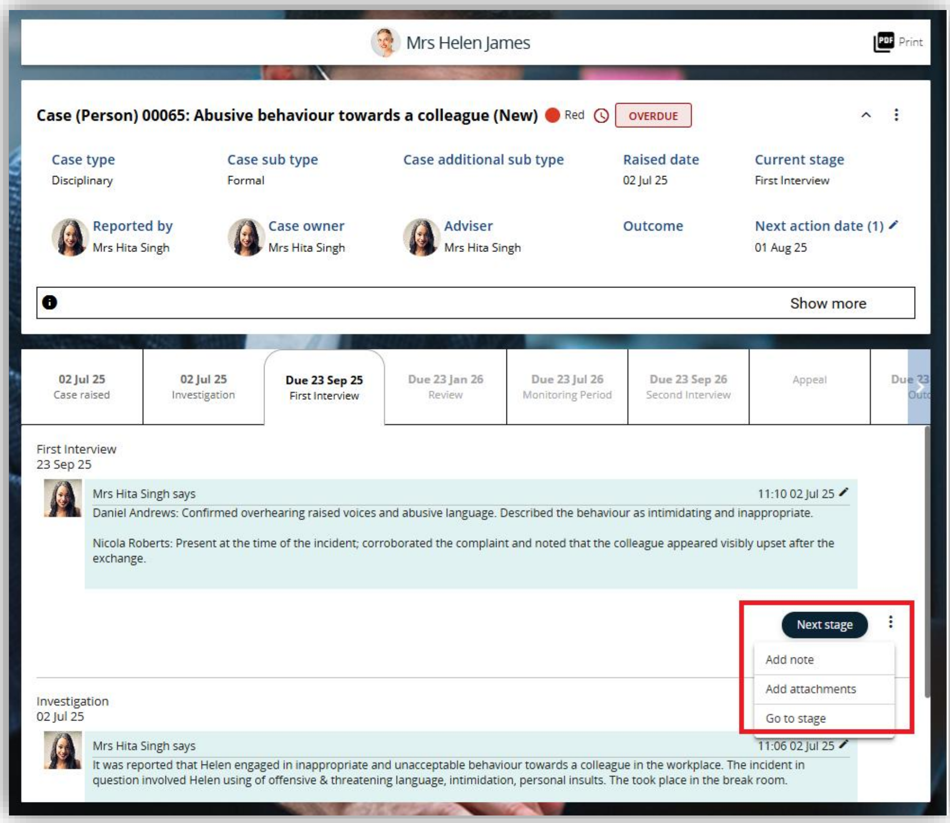
From the case summary screen, the user is able to drill down to view individual cases. They can also view the stage in the lifecycle that the case is at and easily progress it to the next/another stage. This case overview also provides key details at the top for example case type, stage etc., along with a narrative which can be used to provide details of the relevant policy in relation to the case. Links to the externally held policy can also be included here if required.

Each stage of the lifecycle has the facility for stage notes and attachments to be uploaded to it. These notes can be used to record and track any conversations as the user who added the note is displayed, alongside the date and time.

Any user involved in the case can add a note and all details are stored against the case providing a full history of when the note was added and who said what.

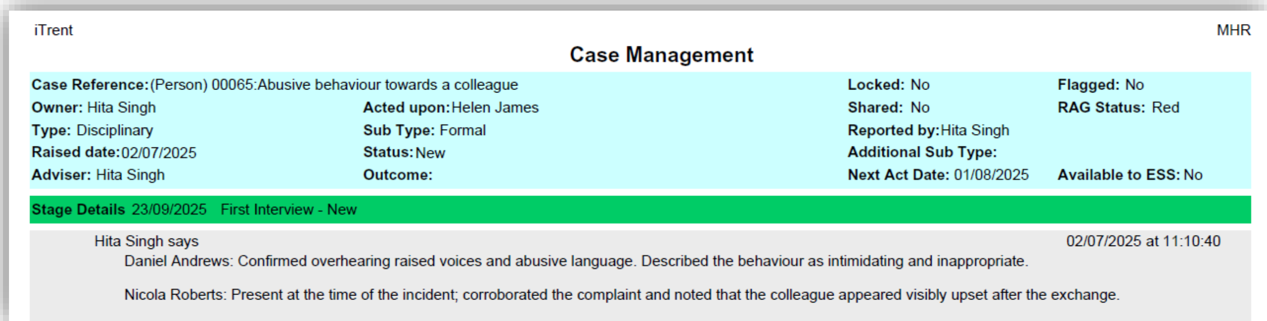


Case overview details



Adding notes, attachments and moving to the next stage within a case

The entire case including attachments can then be exported. An example of the case extract can be seen below:



iTrent MHR

Case Management

Case Reference: (Person) 00065:Abusive behaviour towards a colleague | **Locked:** No | **Flagged:** No

Owner: Hita Singh | **Acted upon:** Helen James | **Shared:** No | **RAG Status:** Red

Type: Disciplinary | **Sub Type:** Formal | **Reported by:** Hita Singh

Raised date: 02/07/2025 | **Status:** New | **Additional Sub Type:**

Adviser: Hita Singh | **Outcome:** | **Next Act Date:** 01/08/2025 | **Available to ESS:** No

Stage Details 23/09/2025 First Interview - New

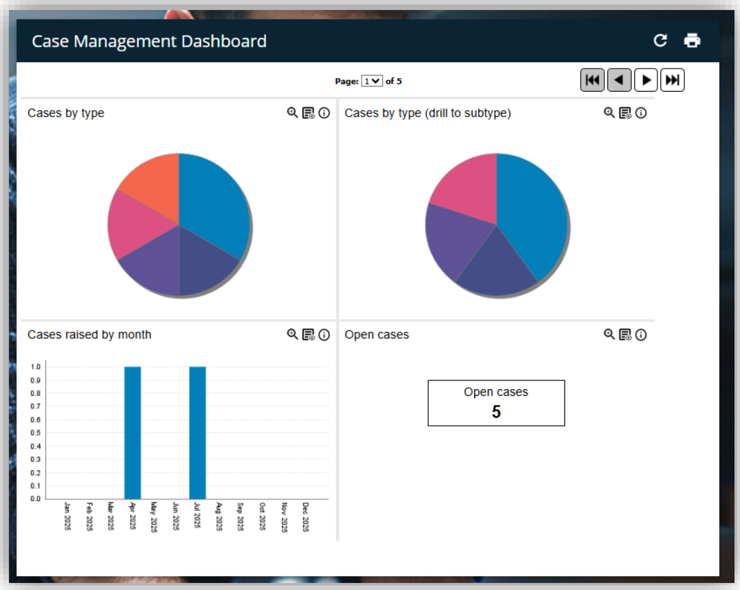
Hita Singh says 02/07/2025 at 11:10:40

Daniel Andrews: Confirmed overhearing raised voices and abusive language. Described the behaviour as intimidating and inappropriate.

Nicola Roberts: Present at the time of the incident; corroborated the complaint and noted that the colleague appeared visibly upset after the exchange.

Case management extract

Admin users also have access to case management charts which provide users with a visual representation of all the cases they can access. Case management charts have case security built into them. A screenshot can be seen below:



2.2 Payroll Software

Payroll is one of the most critical operations for an organisation. With the wage bill representing a large portion of an organisation's operating costs, payroll must be accurate and on-time. Our payroll software has been developed to provide organisations with functionally rich, secure, reliable, and cost-effective payroll management systems.

The payroll facility is a flexible, intuitive, and highly configurable module within the product. It is designed to automate payroll processes and minimise time-consuming administrative tasks, providing a payroll system that brings compelling efficiencies to the payroll department through the automation of complex and labour-intensive payroll processing. Its features include:

- Integral navigation aids - comprehensive workflow and intuitive help wizards within the system guide you effortlessly through any complex processes, such as new starter creation.
- Interactive payroll calculation - changes to the payroll are immediately visible.
- Full costing - enabling detailed management of your labour costs and integration with your finance systems.
- Batch scheduling - graphical at a glance scheduling, along with control and monitoring of batch processes, enables automated payroll processing at any time within the system without manual involvement.
- Net-to-gross calculation - allows immediate visible prediction of gross pay from a net figure.
- Payment and deduction elements - a range of commonly required payment and deduction rules are supplied pre-defined within the software to allow fast-track implementation and a powerful point and click calculation facility allows additional rules to be generated easily.
- Retrospection – the software's powerful retrospection facility deals effortlessly with usual backdated pay awards.

- Web-based manager and employee self-service – payroll software that allows employees to maintain their bank account details, view and print their payslip history, and input time and expenses claims significantly reduces the administrative workload on the payroll office.
- Report writer – a powerful and intuitive payroll report writer that is used to provide the comprehensive range of reconciliation reports.
- Seamless integration - allows payments generated within other areas of the system (such as absence) to be paid without the need for re-inputting.
- Multiple employments - meets the rigorous payroll requirements of the Public and Private Sectors, paying individuals with more than one role within the organisation.

Functions linked to payroll also include:

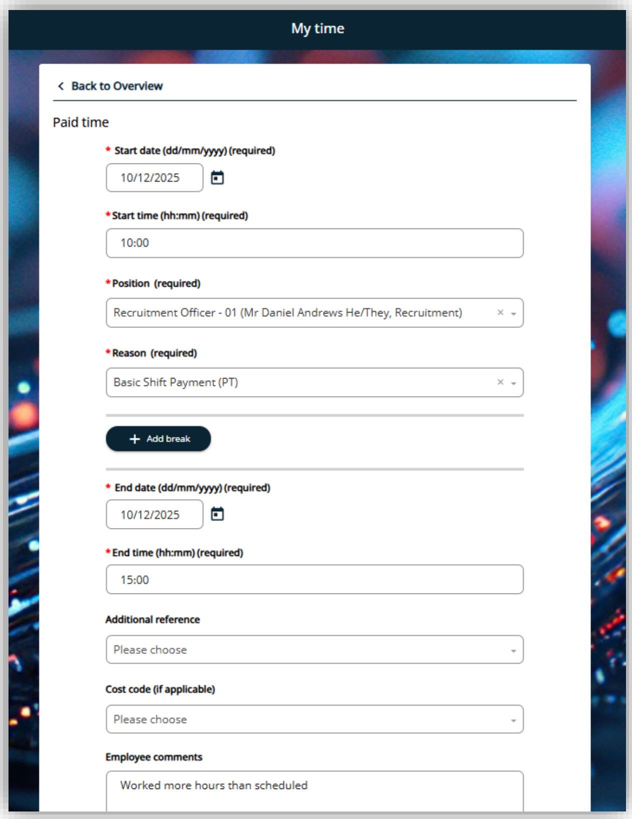
- Paid time function – allowing actual time to be recorded direct to the system with no further authorisation required (unless configured), and exceptions highlighted to system users for approval.
- Timesheets, travel and expenses management offering powerful time and expenses payment functionality normally only found in a stand-alone product.
- Flexible benefits options offering varying levels for recording of flexible benefits depending on the level of functionality and management required.
- Offboarding facilities allowing you to issue an eP45 and for leavers to access their pay documents in a timeframe you control.

2.2.1 Paid time facilities

The paid time module within iTrent allows an employee to record paid time records through employee self-service and these are directly processed by payroll for payment. Scheme set-up is simple and can be inherited through the structure as a term and condition. A paid time rules user calculation can be attached to the scheme. This will allow the build of a calculation that incorporates specific organisational paid time rules, for example start time, grace periods and minimum lunch breaks. The result of the calculation will be an exception flag and description which can be referenced in workflow to determine if authorisation is required for the record. An alert can also be configured to automatically notify the manager where an employee has not clocked in within a set number of minutes of the shift start-time.

Employees can also clock in/out using paid time functionality in employee self-service via any compatible device (laptop, iPad. Smartphone etc) using an appropriate browser. This involves each employee logging into their own self-service page and navigating to the pay and benefits tab. Once clocked in/out the data is automatically available to the payroll function for processing in the relevant pay period without any additional user intervention (subject to any time exceptions raised).

Functionality has been designed on an approval by exception only basis i.e. employees simply clock in/out, and data requires no additional user tasks/authorisation unless an exception is generated. An example exception screen is indicated below for a manager showing laptop or mobile access:



Paid time system screen showing exception rules

This reduces the amount of manual processing required of your managers/approvers and means your data is available for processing as soon as the time period has been closed.

Geo-stamping functionality records where the employee is when they clock in/out providing additional monitoring. A map is presented to the authoriser who would be responsible for checking this before approving or rejecting.

2.2.2 Travel & Expenses Management

Our product's self-service, process driven, multi-tier authorisation functionality empowers employees and managers to take responsibility for expense claims resulting in significant cost savings associated with inaccurate and inefficient processing, rewarding your people with prompt claim settlements.

Features include:

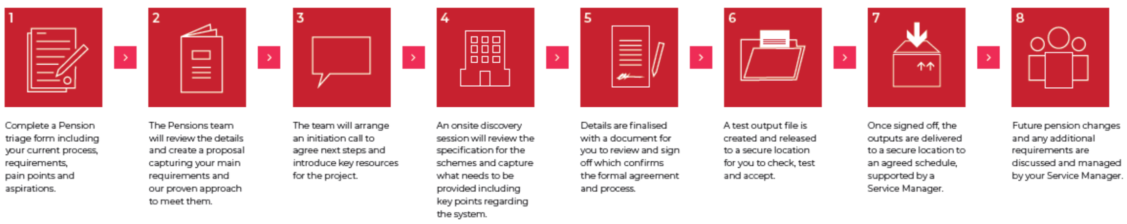
- Car mileage schemes - Allows comprehensive user definition of company rules covering all vehicle types, whether company or private. Incorporates payment of fixed car allowance payments as well as mileage claims.
- Vehicles - Maintain details of company and leased cars for mileage claim and P11D reporting purposes.
- Claims - Single claim or batch input forms have been designed to minimize keying whilst capturing all necessary data to ensure accurate payment and costing of car mileage and miscellaneous expenses.

- Calculations - Calculate individual claims and view results instantly or use the multifunction bulk calculation feature. Either way calculated values are passed directly to payroll and can be viewed on-line. Payroll calculations ensure correct National Insurance deductions are taken even where employees have multiple jobs within the organisation.
- Statutory tax reporting - At year-end the system will produce reports for the calculated values of profit (for P11D) OR 'losses' for optional MARORS reporting.
- Management reports - A range of standard reports and advanced analytics (using MHR Analytics) assists the management and monitoring of claims and mileage.
- Web-based self-service - Design your own expenses input forms for direct employee completion prior to on-line approval by the reporting manager. Devolves administration away from the Payroll office, reduces the paper trail and improves accuracy and timeliness.

2.2.3 Regulatory Returns

Producing accurate pension returns has never been so challenging (in terms of complexity) and time consuming for organisations. The push towards monthly submissions, the looming thought of annual returns combined with the pressures on already stretched resources is further exacerbating the issues with the onus on timely and accurate returns. Many companies are resorting to a manual or semi-manual process to prepare the files which further increases the risks of errors. In a number of instances, the individual tasked with completing these returns represents a single point of failure.

MHR's proven Pension Data Service (PDS) can remove all of these pain points by automating the provision of meaningful outputs to a given specification / set of specifications. The PDS is a proven, sophisticated, provision that produces the pension return(s) accordingly to an agreed timescale. It removes the pain of generic outputs, interface requirements and other complex data manipulation that cannot easily be achieved using traditional reporting tools. The service is available for all public sector pension formats and MHR also has a strategic partnership with i-Connect (where this proves applicable) based on the efficiencies of the PDS solution - further information can be found by following this link.



Customers no longer spend valuable time battling complex reports or money on bespoke consultancy. Our dedicated solution extracts the relevant information straight from the source system (e.g. iTrent) and provides accurate returns in the correct format for submission, securely and to a frequency to suit. Following the initial development and sign off, the PDS solution will run the report each designated period (to a pre-agreed schedule) in line with the latest legislation and securely and automatically output the file for checking before submission.

This automated approach removes the need for manual intervention, so customers can remain confident that their outputs are accurate and intelligently monitored. Looking forwards, the PDS service management function works with customers to ensure any subsequent changes to funds that are required can be assessed, discussed and seamlessly incorporated accordingly exercising change control as appropriate.

MHR has far more than 250 customers utilising the PDS solution to produce 1 or more returns ranging from small district councils right the way through to Police Forces and large authorities / service providers up to 60,000 employees. Schemes currently provided through PDS includes but is not limited to MCR, LGPS, I-Connect, XPS, Firefighters, USS, SPPA, Aviva, People's Pension, L&G, Scottish Widows, Aegon, NHS etc.

The link demonstrates how PDS allowed us to complete the Devon County Council (here.)

A Pension Administration Service (PAS) is also available to further enhance this solution whereby MHR's specialist pension team can take responsibility for submitting the output files produced by the PDS service to the relevant portal. We can also, in turn, deal with any queries from the funds / employees.

To further enhance this offering, we can broaden this service to provision other regulatory returns – again calling upon our domain expertise surrounding HR and Payroll and analytics. Examples include but are not limited to Gender Pay Gap, HESA and Executive Pay Ratio Reporting.

2.2.4 Flexible Benefits

Organisations today need to attract, motivate, and retain talent at a time when salary boosts are not a viable option. Flexible benefits and a clearly communicated total reward package offer a creative, personalised, cost-effective way in which to attract, motivate and retain employees, without huge increases in the wage bill.

We have several options to manage flexible benefits depending on the level of functionality and management required:

- information can easily be recorded against user configurable T&C items or in user defined fields.
- the payroll aspects of flexible benefits are handled by using pay elements and with the correct deduction of tax and NI. Employees can opt in and out of benefits such as pension membership.

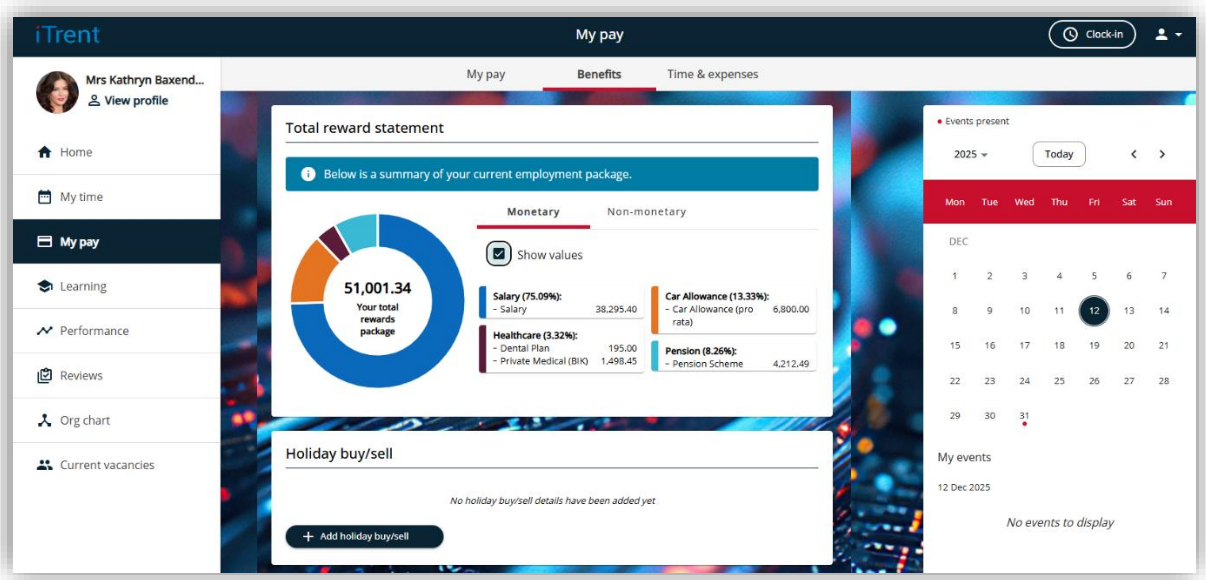
Our solution can also offer a total reward statement (TRS) providing employees with a personalised document summarising both the financial and non-financial aspects of their employment package. The items and values visible in the TRS reflect the employment package as at the current date.

Employee benefits are recorded in the system as terms & conditions (T&Cs), and these can be attached at any level of structure or against an employee.

Employees can access their TRS within employee self-service. Payroll elements can be attached directly to user configurable terms and conditions items, thereby linking the value or payment table/scale point of the element to the chosen T&C item.

Cash value and non-cash value items (such as free car parking) provide a comprehensive range of contracted benefits in the statement.

The display of the TRS in employee self-service is controlled by navigation security.



2.2.5 Offboarding

The system includes offboarding functionality to allow leavers to access their pay documents from self-service, including an eP45. A specific security profile is created to allow this with timescales for access are configurable by the customer. Supporting functionality around this includes:

- the downloading of all/user-defined range of payslips
- multiple previous payslips available in the core solution
- leavers can specify their email address preferences.

To support this, the employee is also able to resign via self-service. This functionality includes the ability to configure a cooling-off period.

2.3 Talent Management Software

The talent management software suite is fully integrated with the rest of the product functionality, providing a single web-based solution for talent management, HR and payroll. This gives our customers a unique advantage, with the ability to implement a seamless, end-to-end talent management strategy which is supported by a fully integrated tool set.

Using a human capital management (HCM) approach, the talent management software solution enables the development of a talent management strategy that aligns people to organisational goals, develops talent to support future requirements, and releases the true value of personnel. This single solution presents the visibility of information needed to identify which people strategies have the greatest impact on organisational performance. The software enables organisations to:

- Have clear visibility of the organisation's goals and objectives.
- Develop a valuable, informed talent management strategy.
- Align operations, structure and resources to deliver against goals.
- Ensure that its people are fully equipped and engaged to deliver against the goals and objectives.

- Identify and reward high performers.
- Identify and manage poor performers.
- Ensure a high performing leadership pipeline.
- Ensure good bench strength for critical roles within the organisation.

Features of the talent management software suite include:

- Recruitment and Onboarding - enabling role and applicant profiling, attraction, web application processing, sifting and selection and on-boarding processing.
- Performance management - including corporate and personal objective management and alignment, employee reviews and outcome monitoring.
- Learning Administration - including full learning event administration, automated prerequisites and outcomes, learning objectives and evaluation, learning needs analysis and employee learning account.
- People development - including employee and job profiling, match and gap analysis, development plans, CPD monitoring, skills and qualifications.
- Succession planning - enabling analysis of bench strength for roles and development planning for gap closing.
- Manager Dashboards
- Employee Questionnaires

2.3.1 Recruitment and Onboarding including e-signatures

No area of HR has undergone more radical change over the last five years than recruitment. The role of online HR recruitment software has played a huge part in broadening organisations' reach, facilitating the selection of the best candidates, and delivering a strong employer brand into the marketplace.

The recruitment software is part of the full talent suite, supporting businesses in the implementation of strategic end-to-end talent management. The recruitment facility is used by organisations looking to strengthen their employer brand and attract the best candidates from the widest pool of applicants. It enables organisations to:

- Reinforce their employer brand.
- Attract the best candidates.
- Maintain a wide talent pool.
- Achieve effective recruitment from role profiling and match and gap sifting.
- Achieve proven substantial cost savings from process efficiency.

Features of the recruitment software include:

- Web access - allows the creation of online highly configurable web application forms.
- Mobile responsive web access, enabling applicants to search for and apply for jobs using their mobile devices.
- Comprehensive applicant processing - ensures a very positive candidate experience.
- Digital images - paper documents such as CVs and application forms can be easily stored, minimising the need to hold hard copies.
- CV Parsing functionality is available within the web recruitment portal enabling an applicant to upload their CV and populate the data on the application form.

- Match & gap analysis - a graphical process for quick and efficient analysis of initial applicants and provides a suitable ranked short-listing of applicants.
- Automated stage processing and correspondence generation - enables significant process efficiency savings and drastically cuts time to hire.
- Interview scheduling - for individual or bulk scheduling, generating appropriate correspondence where applicable.
- Reference tracking - tracking and storing references removes the need for paper-based copies. These can be accessed within the system via each requisition.
- Media analysis - media event success rates can be tracked to identify the most cost-effective sourcing of high quality applicants.
- Appointment - seamless process where recruitment data is transferred to the HR Management and Administration module.
- Shortlisting - used to determine if the applicants meet the requirements stated in the vacancy. Unlimited shortlisting criteria can be defined by users and then collated into a set to be attached to any stage of the recruitment process.
- Killer questions - Unlimited questions can be defined and can then be grouped (into sets) with branches coming from responses where required. Questions can exist in several question sets, which can be attached to application forms either as the default for a particular application form design or to requisitions. The application form designs can include any questions sets that have been attached.
- Job board posting – iTrent includes an integration to Broadbean to post jobs via Broadbean to selected job boards. Once published you can check the status of the jobs and delete selected jobs from job boards.
- Share jobs to social media – iTrent enables jobs to be easily shared via Facebook, Twitter and LinkedIn, both from a recruitment administrator and applicant
- Electronic signatures – built in e-signatory functionality allowing candidate to sign and return documents online easily with no third-party involvement.

Onboarding portal

Candidates can log into an onboarding portal giving them easy access to the self-service solution where they can accept their job offer online, view and update their own information, access company policies etc. all before their start date.

Workflow can be assigned providing automatic movement between recruitment stages and notifications of known absence to new managers allowing them to plan team movements. Functionality includes:

- Dedicated security profile for applicant to log in.
- Additional HR data to be captured via self-service.
- View offer letters within applicant portal.
- Accept / Reject offer within applicant portal.
- Ability to add known absence with workflow to new line manager.
- View company policies

A configurable checklist is also included providing applicants with clear actions that should be performed prior to joining the organisation. This includes updating key contact details or completing any essential reading or learning.

Electronic signatures

- Electronic signatures and correspondence are built-in functions of iTrent requiring no additional third-party software and allows users to create the document and send it for signature. The user would generate a mail merge document, then a request will be issued for signature. The process to the employee is expected to be:
- Once a change has been made in iTrent and the document has been sent, the employee will receive an email containing a link to the employee login screen to say they have a document to view/sign.
- When they next log in to employee self-service, a pop-up message appears to display the document.
- A text box is presented to type their name into, sing a 'signature' style font.
- Once text has been entered into the text box, a sign button becomes active, and the employee can click sign.
- A message then appears to confirm the signature taking place.

2.3.2 Performance Reviews and Talent Check-In Software

The requirement to deliver more with less whilst at the same time developing greater competitive advantage drives the imperative to build a performance culture within the organisation.

Our performance management software module is a core element within the talent suite, supporting businesses in the implementation of strategic, end-to-end talent management. Our software is used by organisations looking to drive workforce improvement through the management and visibility of employee performance objectives and the alignment of these to business objectives.

The performance review functionality enables organisations to:

- Have clear visibility of goals and objectives
- Implement an informed employee management strategy
- Align operations, structure and resources to deliver against goals
- Ensure that its people are fully equipped and engaged to deliver against the goals and objectives

Features of the performance review functionality include:

- Online performance reviews - fully configurable evaluation forms enabling employees, managers and other nominated reviewers to complete and review information. Reviews are made more accessible and part of everyday working, supporting the traditional annual process as well as regular check-ins.
- Goals and objective management - fully configurable objective management including organisational objectives, personal objectives and linkage to demonstrate the strength of alignment with organisational goals.
- Action tracking and progress management - enabling reviewers such as a managers or employees to record and view progress in support of an objective or an objective action.

2.3.3 Learning & Development software

The learning management module is part of the talent suite, supporting businesses in the implementation of strategic, end-to-end talent management. Learning management is used by organisations that are looking to drive workforce engagement and optimisation through needs-based learning and development.

Learning needs analysis is the first key element to an effective learning strategy. All too often, learning is viewed from a generic, organisational viewpoint, with mainly classroom-based courses being developed. Yet without knowing an individual's starting point of skills, courses are aimed at a level playing field. This inevitably means that some people receive training in areas they don't need, and others do not receive enough.

The learning and development functionality reflects and supports a shift towards employee centric learning and development. This identifies the individual learning needs of the employee and supports the management of tailored delivery solutions to address these.

Our learning management software enables organisations to:

- Enhance employee engagement and retention of core talent through targeted learning investment.
- Increase levels of workforce performance through a raised workforce skills base
- Ensure targeted, needs based learning.
- Increase levels of return on learning investment through more effective learning
- Strengthen learning alignment to support organisational objectives.
- Its features include:
- Personal learning account - provides employees with a full view of learning at any stage of the process, including cost of learning.
- Configurable online pre and post event learning evaluation - to measure effectiveness of learning.
- Development plan actions - can be linked directly to relevant learning and can also automatically place employees on the waiting list.
- Learning needs analysis - enables direct actions from performance review.
- Course templates - for efficient learning administration
- Attendee list management – using standard reports.
- Resource management - allocations are controlled through a graphical diary facility so that resources are automatically time and date managed.
- Prerequisites - ensures that only people with the correct skill set and previous qualifications can request a booking.
- Web-based self-service - employees can view and maintain training and waiting list requests, whilst requests can be routed to managers for appropriate authorisation.
- Authorisation - workflow ensures requests follow a full authorisation process.
- Waiting lists - block booking facility and ease of transfer onto scheduled events
- Correspondence generation - automated correspondence can be produced for all stages of the training process.
- Course outcomes - ensures that on successful course completion, delegate profiles can be automatically updated.

- Costing - ease of cost tracking for both internal and external delegates and event resources

See 2.3.4 below for more information regarding our market leading MHR LMS. This also includes details on our optional MHR Content Hub.

2.3.4 MHR LMS

To deliver a truly end-to-end learning experience, MHR also provides an award-winning, market-leading Learning Management System (LMS) that seamlessly supports both learning and compliance needs. Built on a proven platform with more than 2,000 implementations worldwide, the LMS is backed by MHR's extensive expertise in deployment, configuration and ongoing support, ensuring a reliable and scalable solution for every customer.

The system is highly configurable, enabling organisations to tailor the user journey and navigation to reflect local requirements while promoting strong engagement. Consistently ranked as the leading LMS for usability, it offers a user-centred experience that supports the three core approaches to learning: e-learning, classroom delivery and virtual instructor-led training. For virtual training, any webinar technology can be utilised, with enhanced integration available for Teams, Zoom and Webex. A configurable external learning screen also enables the recording and tracking of learning undertaken outside the platform.

The LMS accepts a wide range of content formats including SCORM, xAPI, AICC and LTI, allowing existing materials to be consolidated effortlessly and ensuring organisations continue to maximise previous investments. Comprehensive reporting capabilities are available at all levels, with users able to view their own activity, managers provided with a clear team view and system administrators supported through a suite of pre-built and configurable reports that can be scheduled and distributed. Course assignments and learning plan allocation can be easily driven by user profile attributes, while role-based data can be used to define targeted learning requirements and automatic enrolment rules.

Structured learning plans and pathways can be created to guide users through their development journey and deliver consistent outcomes. The LMS also provides extensive options for notifications and reminders, with around 120 configurable events to support compliance, completion and engagement. A broad range of learning formats is supported, including podcasts, videos, micro-learning and curated content, along with gamification features such as badges and rewards.

A configurable observational checklist feature allows enhanced engagement for processes such as annual performance reviews, enabling questions, supporting materials, feedback forms, tests and certificates to be built into a single course structure. The intuitive course player ensures learners can progress smoothly and pause or resume training whenever needed. Optional data migration services are available to transfer historic completions, helping customers to maintain accurate learning histories and renewal triggers. E-signature functionality supports critical policy adherence, including data security requirements.

A fully branded mobile app for both Android and iOS extends access and flexibility, with menus and pages adjustable to meet customer needs. The LMS provides extensive integration capability through published APIs, including a productised, out-of-the-box integration with iTrent and People First to create a seamless user experience. The web front end supports multiple browsers and is underpinned by robust security, encryption and GDPR compliance, managed within an ISO27001-certified framework and hosted on AWS.

With support for 50 languages, the LMS enables users to learn in their preferred language. Single Sign-On is available across multiple protocols, and the platform is designed to ensure an accessible experience for all users, complying fully with WCAG 2.1 AA standards. Deployment is rapid and proven, supported by comprehensive upskilling to ensure customers become confident and self-sufficient. The solution is modular, guided by a focused and structured roadmap, with optional extensions such as learning impact analytics and social learning available subject to commercial agreement.

2.3.5 MHR Content Hub

MHR offers a content library to complement the LMS, which constitutes an extensive library of off the shelf content and is one of the largest curated e-Learning libraries made from the world's top training providers. This valuable resource can help to cover key areas including, but not limited to, compliance, safety, business skills, leadership & management, technology, wellness, DEI and more industry specific courses. From an MHR perspective, it is available in subscription bundles – of 30, 100 or Premium (which is all items in the catalogue) and this will align to the concurrency on the MHR LMS for monthly access.

The Content Hub constitutes a mix of immersive content of differing lengths and types.

MHR also offers a content creation tool for the building of bespoke training materials by any organisation, pricing available upon request.

2.3.6 People Development

If retention of core talent is one of the biggest talent management challenges that an organisation can face, it is interesting that the consistent top reason for leaving is better career development outside of the organisation. If organisations are serious about retaining their core talent, they must demonstrate clear career pathways and be seen to have processes in place to manage employee development.

The people development functionality is part of the talent suite, supporting businesses in the implementation of strategic, end-to-end talent management and allowing organisations to optimise workforce performance through employee engagement, retention and an enhanced skills base.

Development plans within the software are configurable programmes of development activities, such as qualifications, CPD activities, skills, memberships, learning activities and checks, which can be linked to roles or directly to the employee.

Users are able to define expected achievement dates, and because development plans are fully integrated with the rest of the employee profile and learning functionality, the view is automatically updated as achievements are recorded. This provides the user with a simple pictorial indication of the employee's progress within the plan, and alerts are provided to warn when achievements are not on track.

The people development software enables organisations to:

- Ensure that their people are fully equipped and engaged to deliver against organisational goals and objectives.
- Ensure a high performing leadership pipeline.
- Ensure good bench strength for critical roles within the organisation.
- Retain core talent.

- Improve internal mobility to reduce external recruitment costs.
- Support future business development planning with workforce readiness.

The people development software features include:

- Employee profile - professional attributes such as learning, skills, qualifications, checks, professional memberships, CPD and development plans, are all held against the employee.
- Organisational profile - the above profile items can also be defined throughout the organisational structure as requirements of the role or business unit.
- Match and gap - enables role requirements to be matched against employee (or applicants) profile attributes to give graphical analysis of the strength of match.
- Talent summaries - (or internal CVs) are graphical, printable summaries of the employee profile, including performance ratings, experience and all of the profile attributes. This is a highly popular piece of functionality useful in talent reviews and calibration activities.
- Personal career plans - allow managers to track and monitor their employees' career aspirations.
- People development is available within self-service for employees to carry out a skills self-assessment and log items such as CPD.

2.3.7 Succession Planning Software

Throughout the recession, many businesses have had to revise strategy to deliver enhanced levels of service with a reduced workforce. Many find that some of their critical roles and leadership requirements have changed, presenting the perfect backdrop for some much needed succession planning.

The product's succession planning software is part of the talent suite. Our software is used by organisations looking to retain current talent by demonstrating clear succession pathways and ensure workforce readiness to deliver future business goals.

It enables organisations to:

- Align resources to deliver against future organisational goals.
- Ensure that its people are fully equipped and engaged to deliver against future goals and objectives.
- Ensure good bench strength for critical roles within the organisation.
- Ensure the right skills are in the right place at the right time.
- Have visibility of which areas are fully skilled and where there are skills shortages.
- The succession planning software features include:
- Graphical views of every role within the organisation structure and its profile requirements, giving a comprehensive view of your organisation's resource requirements and the distribution of these
- Personal profiling enables the user to define and hold key attributes of each employee, including qualifications, development plans, continuing professional development activities, skills, professional memberships, learning activities and checks.
- User definable potential rating and readiness for next role

- Match and gap search engine, providing a compelling view of your organisation's resource requirements compared with actual workforce profile.
- Targeted skills and learning strategy plan to enhance readiness for next move.
- Identification of potential next roles

2.4 Workforce Management Software

Our workforce management software allows organisations to enhance workforce performance through optimised structures, rosters, resource and skills distribution, as well as management of peoples' time at work.

Workforce management is fully integrated with the rest of HR, payroll and talent management functionality, providing customers with a unique advantage in the ability to implement a seamless, end-to-end human capital management strategy which is supported by a fully integrated tool set.

Never has the pressure to deliver more with less been more evident. When it comes to an organisation's workforce, this demands creativity, sensitivity and a human capital management approach to workforce optimisation. The workforce management software suite sits alongside the talent suite, supporting businesses in the implementation of strategic, end-to-end human capital management.

Workforce optimisation can only be achieved in an organisation when there is a high performance culture, a fully engaged and willing workforce, and the right skills are in the right place at the right time. Our software's fully integrated workforce solution is well placed to support you in this.

The workforce management software enables organisations to:

- Align operations, structure and resources to deliver against the organisational goals.
- Ensure that its people are fully equipped and engaged to deliver against the goals and objectives.
- Ensure good bench strength for critical roles within the organisation.
- Manage peoples time at work as well as absence.
- Ensure the right skills are in the right place at the right time through optimised rosters.

Its features include:

- Absence management
- Time and attendance management including configurable flexitime and TOIL schemes with the ability to clock in and out using self-service.
- Organisation structures and charts (see HR section referenced as 2.1.2)
- Succession planning
- Rostering

Dedicated analytics report pack covering workforce including 18 tabs with 9+ input controls and drill downs on each for:

  - Report and analyse salary costs, headcount, joiners, leavers and turnover.
  - Perform structural breakdown analysis e.g. Service Area, Directorate, Department
  - Month-on-month/year-on-year trending analysis
  - LOS (Length of Service) by Headcount/FTE/Joiners/Leavers/Salary cost/Turnover

- Analyse the workforce by demographics.
- Leaver Analysis

2.4.1 Absence Management Software

Employee absence represents a major cost to many organisations that may not be fully engaging their workforce and optimising their most expensive asset. In real terms, this equates to one of the largest people management issues facing organisations today.

The absence management software functionality is seamlessly integrated with workforce management, talent management, HR, and payroll, enabling the proactive management of absence from cause analysis to payment, cost and control.

The absence management functionality also delivers powerful performance indicators and analytics, such as the Bradford Factor and absence pattern views. This could indicate levels of so-called 'voluntary' absence, which is extremely disruptive to organisations, or highlight where people may need some genuine support. Our software enables organisations to manage absence and its causes, equipping them to consider proactive solutions. It also enables organisations to:

- Ensure that their people are fully equipped and engaged to deliver against the goals and objectives.
- Reduce the levels of unplanned absence.
- Identify patterns of absence
- Reduce costs significantly from automating absence monitoring processes and alerting managers.
- Handle absence management with consistency and equality.
- Track the cost of absence and identify people with the highest levels.

The absence management includes:

- Full manager and employee self-service to empower the only two parties able to really affect change.
- Automated prompts for return-to-work interviews
- Alerts and absence stage management give the manager all they need to manage absence effectively.
- Extensive management reporting providing powerful decision support.
- Absence trend, distribution and cost dashboards for powerful analysis
- Graphical colour-coded calendar enables absence records to be viewed for a scrollable year, showing trends at a glance, including drill down for further details when required.
- Leave entitlement and payment rules - user-defined absence rules can be created for all absence types to allow the automatic calculation of entitlements and adjustments to pay where required.
- Statutory rules for fully automated calculation and processing of SSP, SMP and SPP, including system derived exclusions and the relationship between company and statutory rules and payments.
- Absence calculation calculates entitlements and payments, directly integrated into payroll.

- Dedicated analytics report pack covering absence including 25 tabs with 15+ input controls and drill downs on each)
    - View days lost analysis by areas of business.
    - Perform absence day, cost of absence and reason analysis.
    - Pre-configured days available comparison
    - Analyse month-on-month/year-on-year trending
    - View absence by days, hours or minutes
    - View the estimated cost of absence.
    - Bradford Factor

2.4.2 Time and Attendance Software

Time and attendance functionality is part of the workforce management suite. It captures time worked data via online configurable timesheets or bulk uploads from clocking systems, allowing organisations to analyse actual working time against plan and generate appropriate payments within payroll.

Where customers have complex and dynamic shift patterns, MHR partners other suppliers to deliver a fully integrated end-to-end clocking to payment process. This enables organisations to:

- Monitor compliance with working time regulations.
- Improve the accuracy of data to payroll and reduce the paper flow of manual timesheets.
- Manage flexible working.
- Manage absence, overtime and lateness with consistent processes and accurate evidence base.

2.4.3. Rostering

Rostering is an integral part of iTrent and therefore utilises much of the existing data such as profiles (skills, qualifications etc.), pay rates, known absences (e.g. holiday or training) and working patterns. Working patterns and staffing levels are completely flexible and can be planned and adjusted to cater for the peaks and troughs of the workload during the period. The Roster length is user-definable from a day, week to month or year.

Rosters can be published at various levels, for instance to provide personal rosters for individual employees and team rosters to enable supervisors to know who should be on duty and at what times. Additionally, roster information is available via alliance's reporting tools for ad-hoc analysis or other reports.

Rosters are displayed and maintained using a graphical interface designed to allow non-expert users such as line managers and supervisors to easily manage their staff. iTrent security ensures that only selected individuals can view or amend the roster.

The iTrent Rostering solution provides the ability to:

- Define the tasks which need to be performed at particular times, along with the qualifications, skills and other attributes required to perform them.
- Helps the planner find suitable employees with the skill set required for a task.

- Produce a roster by identifying suitable available individuals to perform the tasks. Employees can be grouped into workforce pools.
- Apply user-defined rules to identify ‘conflicts’ where, for example, employees have not been allocated or allocated staff are absent at the time of the task.
- Ability to search employees and show when an employee is available/unavailable to work.
- Ensure that employees are not double-booked for any period even when working on other rosters.
- Users have the ability to publish and unpublish directly from the Roster Scheduler.
- Employees can view available shifts within self-service and book themselves into those shifts.
- Record actual staff attendance and any changes to the work undertaken against the planned roster including unpaid breaks and special pay information e.g. overtime.
- Can handle additional hours that will be added to a Time off in lieu (TOIL) balance.
- Rostered hours can be extracted for accrued holiday calculations.
- Analyse differences between the planned roster and actual work done.
- Generate expected working patterns based on the roster allocation so that managers can identify who is working on a specific day and answer requests for holiday etc.
- Allow sickness to be calculated and holiday entitlement adjusted based on the rostered time for staff on zero contracted hours.
- Set up a series of planning rosters which roll forward to the current week and into archive.
- Define the rules for rolling a series of rosters and associated tasks as a lifecycle, which enables all tasks to be run by the click of a button.
- Enables a budget to be set against a roster and calculates the predicted cost of the roster based on user-defined formula, which can include values such as actual hourly rate plus on costs for NI, pensions and other items or shifts which attract a single rate for the whole period e.g. standby, sleep-overs. Any call-out in the period can be identified and paid at a different rate with offset against the underlying shift rate.
- Generate feeds to payroll to ensure that employees are paid correctly for work done or for additional payments such as absence, overtime, shift premiums and other factors affecting remuneration.
- Rosters have a “month view,” “day view,” and “day/week/month view” across all views. Rosters can also be printed.

2.5 MHR Analytics and Management Information.

iTrent is supplied with varying levels of reporting and analytic capability, which are easy to use and supports the creation of accurate management information. This is achieved via a combination of standard reports, configurable insights and non-configurable dashboards, data extracts using the advanced search function and leading tools such as BusinessObjects or Power BI.

In summary, our levels of reporting are described below:

The first level of analysis is the powerful search functionality which enables the user to build complex criteria for selection, along with the ability to define what data to display and the one click facility to output the results to Excel. These searches can also be scheduled to run automatically and at fixed points in time, useful for trend analysis.

There is a standard suite of reports available which contain many common performance indicators and establishment analyses including Bradford Factor for absence performance and many diversity and establishment reports.

Manager and Report dashboards provide an easy to access view of data across many modules of iTrent. These automatically flex to the security and access permissions of the user viewing the dashboard and are designed to allow insights into current or potential issues and visuals of key data such as absences or EDI information. The content of the charts within a dashboard are configurable and allow customers to define dashboards to show only the information relevant to the business or individual viewing the dashboard.

A flexible all-in-one payroll report designer allows a number of outputs to be easily configured and re-used all from one simple page. This page is used to create the required content of the 'payment breakdown by employee' reports. Users can easily create a form design and select from many choices, such as which payment elements are included in the report.

A full BusinessObjects universe which renders the data available for the user to design comprehensive personalised reporting for full operational needs.

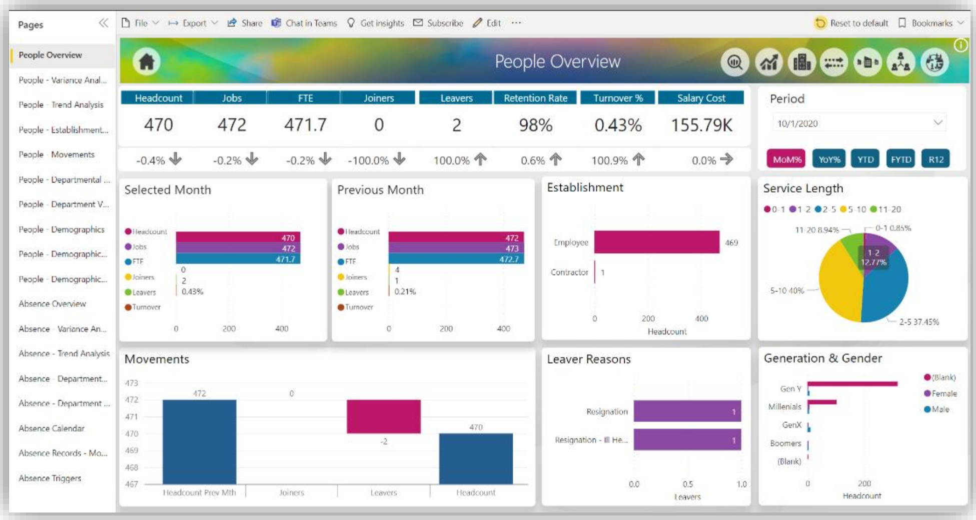
A suite of best practice, prebuilt, BusinessObjects subscription-based report packs for use by our customer base covering absence, workforce, talent, payroll analysis, payroll validation, gender pay and audit. Each pack has a custom data dictionary aligned to it and an efficient query which allows users to derive data and perform tasks that wouldn't be readily available e.g. month on month / year on year / quarter on quarter trending comparisons and drill-down of hierarchy items.

A purpose-built Data Mart (see below) providing next level agnostic strategic reporting capabilities.

2.6 Data, Analytics and AI

The current business landscape necessitates consolidated, accurate management information (MI) to drive data strategy, make cost efficiencies and discover new insights. This is an area where MHR Analytics excels based on over 30 years' experience of serving UK based customers. Analytics forms a core part of MHR's strategy with around 1,000 existing customers using tools such as BusinessObjects and Power Bi. Our analytics suite consists of a powerful set of solutions covering (but not limited to) discovery tools, business analytics (including predictive, AI and smart insights), cloud, data warehousing, change management and compliance across the leading vendors. Our experience in the workforce field means that we offer the technology, methodologies and experience to drive effective outcomes on behalf of our clients.

To provide the appropriate assurances, MHR has an established Technical and Analytics practice with a team of dedicated experts who have assisted countless public sector organisations in exploiting these strategies. Our close strategic relationships with Microsoft, SAP, IBM, as well as other best of breed vendors allows us to tailor scalable, holistic solutions to meet our clients' corporate needs at highly preferential rates. This approach enables customers to harness the inherent power of their data, placing meaningful and structured insights at their fingertips to allow informed decision-making. The breadth and depth of our experience is a cornerstone of the support we can call upon to assist customers through the entire analytics lifecycle, at a pace and budget to suit.

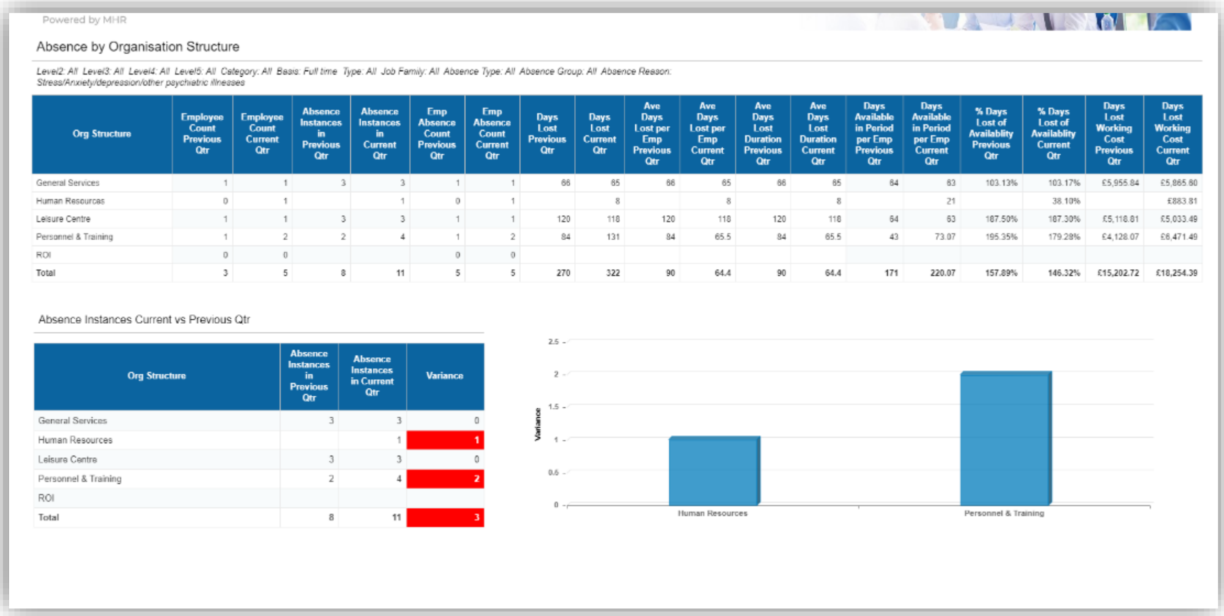


2.6.1 Operational Reporting

Formal, structured iTrent reporting allows customers to view large datasets in row-by-row detail. Users can build their own powerful calculations, such as formulas and variables, and run, schedule and share reports internally. This in turn ensures these valuable insights are shared with as wide an audience as is necessary to drive informed decision making with flexible licensing to underpin. We have several potential approaches to this dependent upon factors such as budget, corporate reporting strategy, individual requirements etc.

As well as bespoke consultancy to aid customers with reporting, MHR's Analytics team has also developed a suite of best practice, subscription-based Report Packs, and apps to provide organisations with a significant head start for their reporting for BusinessObjects and Power Bi respectively. The current Report Packs available are Absence, Workforce, Talent, Audit, Gender Pay Gap, Payroll and Payroll Validation. Each Report Pack is designed with efficiency in mind to allow users to derive data and perform tasks that wouldn't be readily available. These tasks include but are not limited to trending comparisons, drill-down of hierarchy items, intelligently identifying and remedying anomalies with payrolls prior to processing and finite auditing of key tasks within the iTrent system.

The report packs have been designed with ease of use in mind, with content displayed through the intuitive input controls and tabular format. This avoids the risks of a disjointed, disparate report estate. Furthermore, the individual report items can be used to drive templates to satisfy any wider or specific reporting requirements. The packs are fully road-mapped and supported by MHR, which removes the headache of ongoing support, and we actively encourage feedback from the user base to drive the development of the report packs. Individuals with no prior knowledge can be proficient in the use of the packs in no time at all following our proven upskill process.



Powered by MHR

Absence by Organisation Structure

Level2: All Level3: All Level4: All Level5: All Category: All Basis: Full time Type: All Job Family: All Absence Type: All Absence Group: All Absence Reason: Stress/Anxiety/depression/other psychiatric illnesses

Org Structure	Employee Count Previous Qtr	Employee Count Current Qtr	Absence Instances in Previous Qtr	Absence Instances in Current Qtr	Emp Absence Count Previous Qtr	Emp Absence Count Current Qtr	Days Lost Previous Qtr	Days Lost Current Qtr	Ave Days Lost per Emp Previous Qtr	Ave Days Lost per Emp Current Qtr	Ave Days Lost Duration Previous Qtr	Ave Days Lost Duration Current Qtr	Days Available in Period per Emp Previous Qtr	Days Available in Period per Emp Current Qtr	% Days Lost of Availablity Previous Qtr	% Days Lost of Availablity Current Qtr	Days Lost Working Cost Previous Qtr	Days Lost Working Cost Current Qtr
General Services	1	1	3	3	1	1	66	65	66	65	66	65	64	63	103.13%	103.17%	£5,955.84	£5,865.80
Human Resources	0	1		1	0	1		8		8		8		21		38.10%		£883.81
Leisure Centre	1	1	3	3	1	1	120	118	120	118	120	118	64	63	187.50%	187.30%	£5,118.81	£5,033.49
Personnel & Training	1	2	2	4	1	2	84	131	84	65.5	84	65.5	43	73.07	195.35%	179.28%	£4,128.07	£6,471.49
ROI	0	0			0	0												
Total	3	5	8	11	5	5	270	322	90	64.4	90	64.4	171	220.07	157.89%	146.32%	£15,202.72	£18,254.39

Absence Instances Current vs Previous Qtr

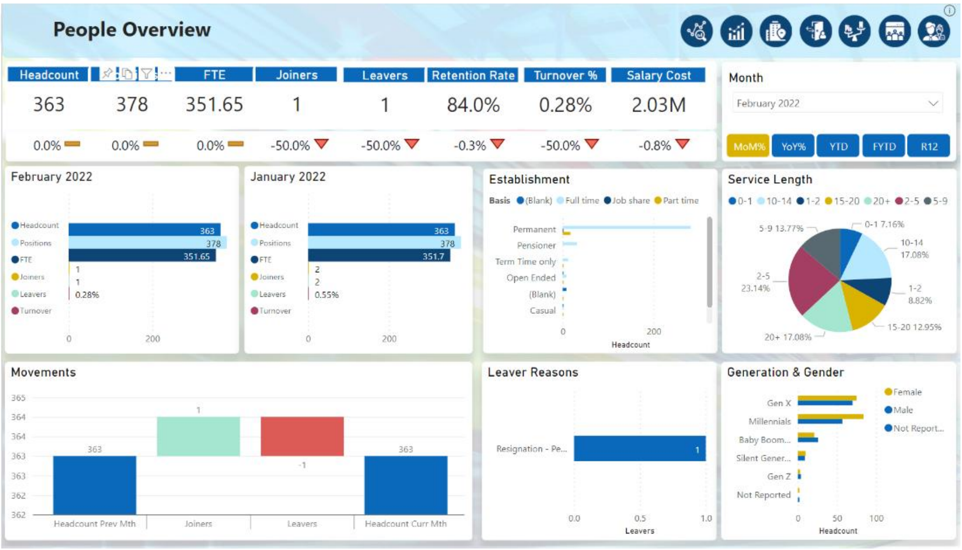
Org Structure	Absence Instances in Previous Qtr	Absence Instances in Current Qtr	Variance
General Services	3	3	0
Human Resources		1	1
Leisure Centre	3	3	0
Personnel & Training	2	4	2
ROI			
Total	8	11	3

2.6.2 Advanced Analytics - Data Visualisation and Discovery

For many organisations, retrospective reporting is simply not enough. Customers also want to automatically identify patterns and meanings in their data (employee and wider data sets) without the need to employ a costly data scientist. Combined with this, there is also the desire to ask business questions in natural language, in the same way they would to Siri or Alexa, without waiting for a report to be built. For example, a HR Business Partner asking for the latest absence statistics.

Advanced Analytics for iTrent, powered by the DataMart (People Analytics Platform) and visualised using tools such as Power Bi, makes all of this possible. Data Visualisation, Predictive, and machine learning capabilities are pre-built and easy for anyone in to use in a few clicks due to the self-serve design principles. Power Bi encapsulates these components into a single integrated solution for both modelled and un-modelled data. Ultimately this allows for the breaking down of traditional silos in the organisation, allowing data from other business areas to be included in the analysis to provide a single version of the truth. This in turn accelerates the decision-making process to drive instant, intelligent informed strategies. The powerful features include but are not limited to:

- Quickly and easily create world class visualisations to share with management.
- Predictive models around employee retention can be deployed.
- Discover anomalies in your data.
- To optimise the use of Power Bi with iTrent, MHR has developed a DataMart (People Analytics Platform) to allow both the BI tool integration as well as the capability to ingest the Data Mart into existing corporate deployments such as a Data Warehouses/Data Lakes (in technologies such as AWS/Fabric/Snowflake).



2.6.3 Data Marts and Data Warehousing

As outlined above, all-encompassing reporting strategies naturally include a combination of reporting tools, such as BusinessObjects/Power Bi/Excel, with an element of visualisation and data discovery provided through the likes of Power Bi. We can extend further reporting on large volumes of data to enhance KPI reporting etc. This would ideally be underpinned by a Data Strategy / Data Marts / Data Warehouses / Data Lakes to allow modelled data to be prepared and a holistic view of an organisation presented.

The table below summarises examples of a use case for traditional reporting vs best practice data warehousing:

Common BI & Analytic Requirement	Reporting Tool	Data Warehouse
Corporate KPI		✓
Cross system reporting		✓
True analytics and "data science"		✓
Strategic reporting	✓	✓
Self-serve reporting	✓	✓
Operational business intelligence & reporting	✓	
Data extracts	✓	
Statutory returns	✓	

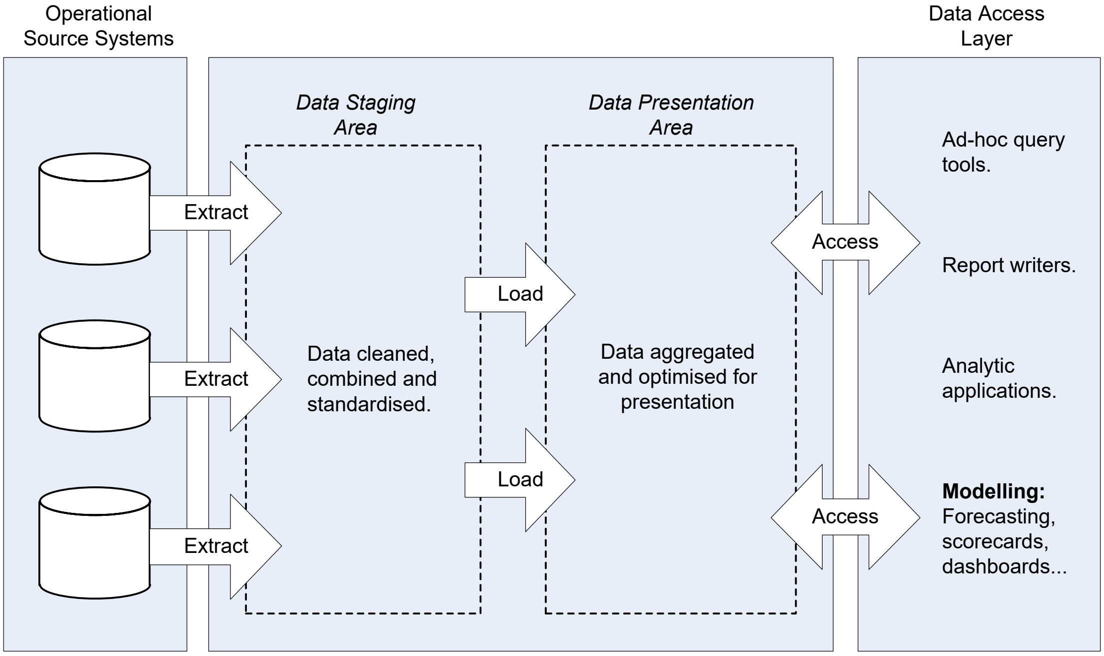
Our experience focuses on the entire lifecycle and includes the relevant components of data quality and governance, design, development, deployment and ongoing support.

To this end, as one example, MHR has developed an iTrent DataMart (People Analytics Platform). This brings a number of advantages / benefits;

- The data is modelled and populated into a star-schema (Fact & Dimensions) design for reporting and analytics purposes.
- It avoids degradation of performance on the iTrent transactional database.

- This could be used to feed a corporate data strategy such as a data warehouse.
- Ideal for analysing large volumes of historic data.
- For complicated data transformation the ETL (Extract Transform Tool) is more efficient than a Business Intelligence tool.
- It is also an efficient means to allow corporate reporting tools such as Power BI/Google/Tableau etc to be efficiently used against modelled iTrent data.

MHR has a proven approach to BI and Data Warehousing as defined in the diagram below:



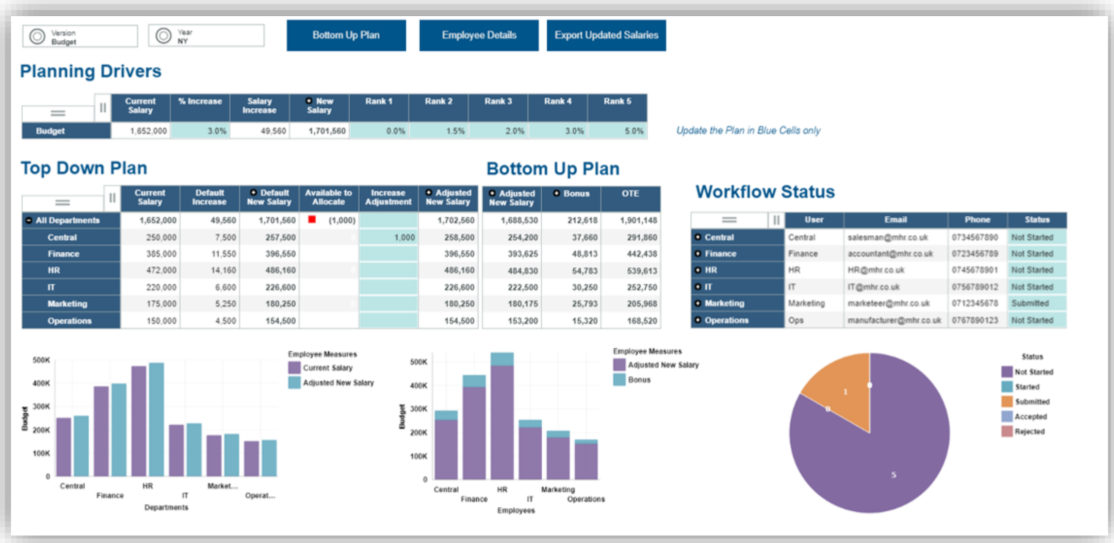
2.6.4 Workforce and Compensation Planning

IBM Planning Analytics (previously known as TM1) is financial planning software that transforms the entire planning cycle, from target setting & budgeting to reporting, score carding, analysis and forecasting. Users can collaborate on plans, budgets and forecasts across their entire organisation.

Our Financial Performance Management experts can assist with building focused planning solutions and models within IBM Planning Analytics for financial workforce planning, headcount planning and compensation modelling.

These solutions remove hours of manual work, allowing businesses to match expenditure to resource and model scenarios to decide on the best outcome before committing to a decision. Spending can also be kept on track throughout the financial year with real-time comparisons between predicted and actual spend. Organisations have complete visibility of their workforce costs, budgets and models to plan as effectively as possible.

Compensation modelling, also known as salary and bonus modelling, can help organisations manage salaries, accurately distribute raises and bonuses based on performance data and review the impact of potential pay adjustments before issuing rewards, as well as benchmark their salaries and bonuses against industry averages.



2.7 Self-Service

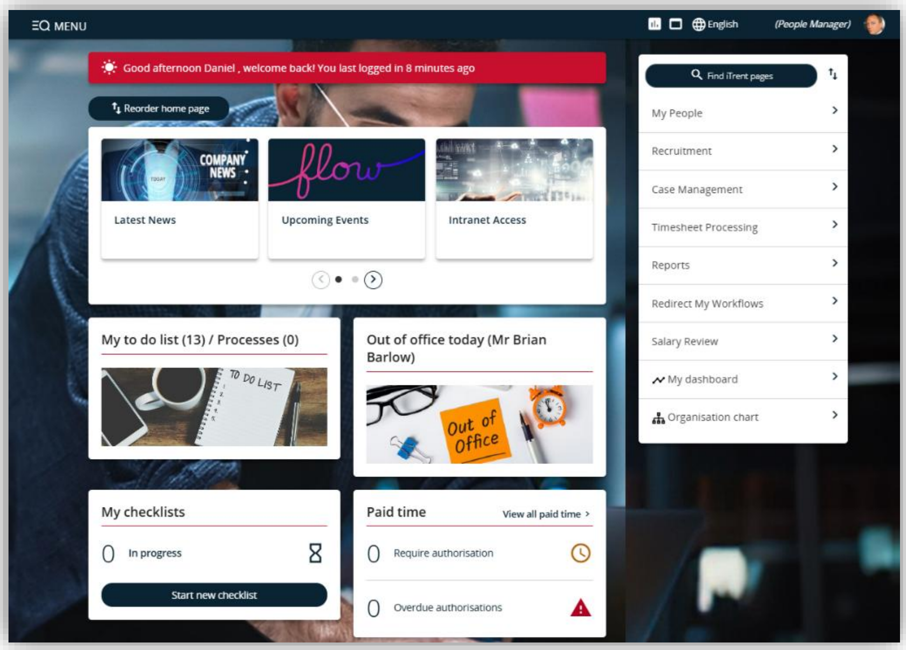
The product enables organisations to devolve responsibility to the people that can make a difference, encouraging employees to take ownership for their own development, performance and learning, and giving managers and employees access to information wherever and whenever they need it. Improved access to information equips managers to manage their people more effectively and efficiently, whilst promoting accountability.

Employee Self-Service: Allows employees to view and update personal data. Embracing the latest technology, information is accessible via the internet and can be accessed by mobile devices.

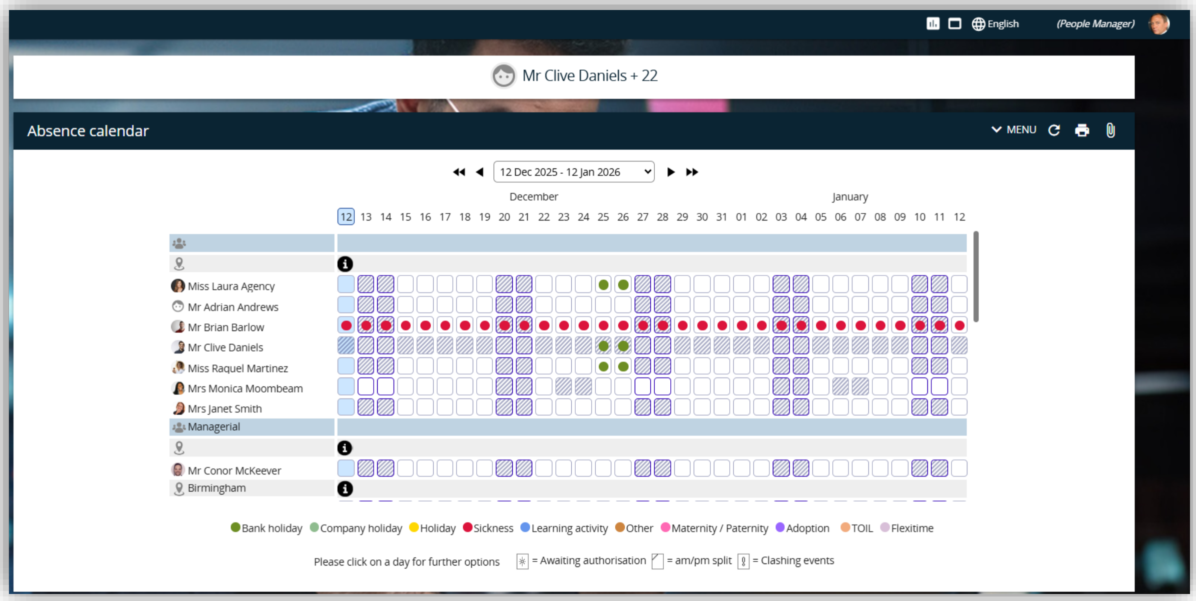
Employees can easily view and maintain their own details, such as name, address, marital status, contact numbers and emergency contacts; employment information covering job details, contact information and historical job details; payslip and bank details; on-line timesheets, expenses, holidays, learning and development, performance reviews and objectives, all available to on-line approval by the reporting manager.

Manager Self-Service: Managers have a single source of key employee data at their fingertips, which relates directly to their organisational responsibilities. Subject to the security access granted, managers are able to view any information for their employees across the full range of the product.

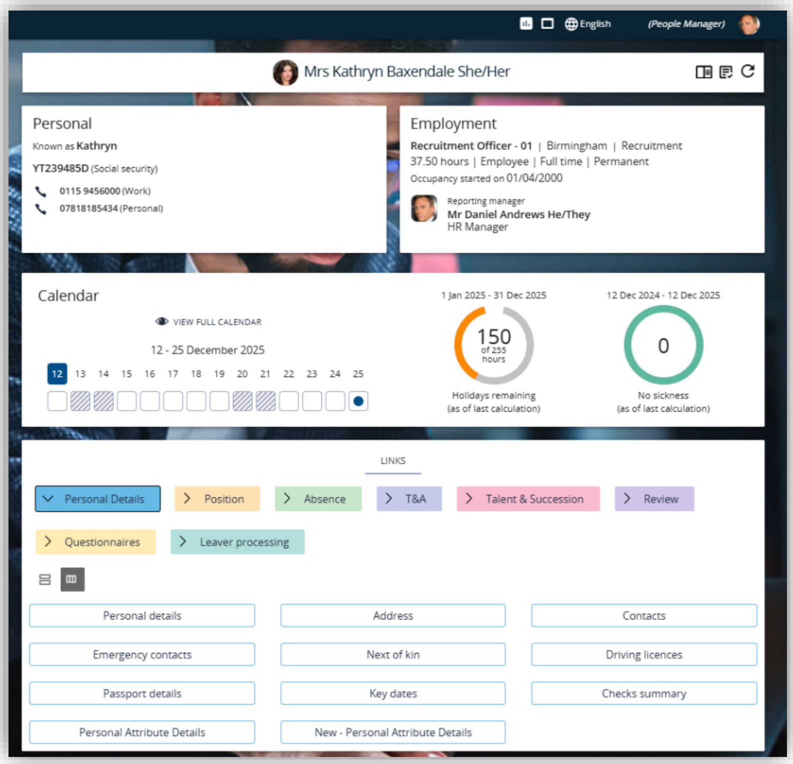
- HR information - enables managers to access personal and position related information.
- Absence - places the management of individual absence directly with the line manager.
- Payroll information - allows managers access to view and maintain employee salary information.
- Personal profile view and maintenance - ability to maintain employee development profiles.
- Performance management - enables the tracking, scheduling and continual feedback to objectives and reviews.
- Learning - allows managers to maintain their subordinates learning requests.
- Workflow tasks - system defined alerts prompt the manager to progress critical tasks such as holiday requests, review feedback etc.



Homepage for manager



Displaying absences in manager self service



Easy access data in manager self service

2.8 Questionnaires

The questionnaire functionality using Survey Builder within iTrent is highly configurable and allows organisations to create configurable questionnaires and attach them ad hoc to people or through scheduled rules.

Employees will then be able to access their questionnaires in self-service and complete them under the Employment tab. These can be used for any number of reasons such as:

- exit interviews.
- employee satisfaction surveys
- return to work.
- flexible working requests
- learning evaluation forms

There is no limit to the number of questionnaires that can be configured and these can include all typical tools such as radio buttons, checklists, text boxes, rankings etc.

3 ITRENT SHIELD

3.1 iTrent Shield – UBA

Would you know if one of your employee's iTrent accounts was being used by a malicious actor, or if one of your employees was stealing data?

iTrent Shield User Behaviour Analytics (UBA) has been developed to provide you with an increased level of security to protect you from these threats. iTrent Shield UBA gives you the ability to identify suspicious behaviour and stop it before it impacts your organisation.

How iTrent Shield UBA provides extra protection - In a first for HR and payroll companies, our software will monitor user activity to detect:

User accounts that have been compromised by a malicious external actor (e.g. through phishing)

Rogue employees that are undertaking fraudulent actions

How iTrent Shield UBA works - A proprietary, AI-powered algorithm is used to learn the normal pattern of activity for each user. When a user's behaviour significantly deviates from their norm, such as viewing significantly more personal data, or they undertake one-off suspicious actions, such as deleting audit records, an e-alert is generated advising you that the user's actions should be investigated.

How iTrent Shield UBA can help your organisation:

- Reduces the risk of sensitive data being stolen or employee salary payments being diverted.
- Provides greater assurance over the security of staff working remotely.
- Allows organisation to meet higher internal or regulatory compliance requirements.

4 PEOPLE FIRST HCM SOLTUION

Human Resources

People First HR is designed to empower HR leaders with data-driven insights and predictive analytics, enabling them to make informed decisions and elevate their strategic impact within the business. By providing actionable intelligence, the system helps organisations anticipate workforce trends, optimise talent strategies, and align HR initiatives with broader business goals.

As a mobile-first system, People First HR ensures flexibility and accessibility. The dedicated app, available on the Apple App Store and Google Play Store, allows users to access the full system from smartphones or tablets, while desktop users can log in via any modern browser on PC or Mac. This seamless accessibility supports a truly connected workforce, regardless of location.

People First consolidates all employee data and core HR processes into one secure environment, reducing reliance on manual, error-prone tasks. This not only minimises administrative burden but also mitigates compliance risks. Through an intuitive self-service model, employees can update their own records, request leave, and access payslips at any time, while managers can approve requests, track performance, and manage team structures effortlessly. These capabilities strengthen engagement and communication, fostering a unified culture and improving organisational resilience.

People First HR also integrates advanced functionality such as recruitment and onboarding workflows, performance management tools, and learning and development modules. These features enable organisations to attract top talent, accelerate onboarding, and support continuous employee growth. Additionally, absence and holiday management tools provide visibility and control over workforce availability, while integrated payroll ensures accuracy and compliance.

As a multi-tenanted SaaS application hosted on Microsoft Azure Cloud, People First HR guarantees security, resilience, and scalability. It adheres to global data protection standards, ensuring that sensitive employee information remains secure while delivering high system availability and stability.

Recruitment

The People First Recruitment module is a comprehensive solution designed to simplify and optimise the hiring process. By automating repetitive tasks and integrating with external job boards, the module helps organisations attract and hire talent quickly while maintaining compliance and efficiency.

At the heart of the module is its ability to manage job postings and applications seamlessly. Recruiters can publish branded adverts across multiple platforms, including popular job boards, and use configurable shortlisting questions to identify suitable candidates. Features such as CV parsing and automated notifications ensure that hiring managers receive timely updates.

Candidate experience is a key focus of the People First Recruitment module. Its mobile-first design ensures accessibility on any device, and the candidate portal provides real-time updates on application status. This transparency, combined with simplified onboarding for successful applicants, creates a smooth and engaging journey from application to employment.

The module also offers powerful analytics and reporting capabilities. Recruitment dashboards provide insights into key metrics such as time-to-hire and approval status, enabling organisations to make data-driven decisions and continuously improve their recruitment strategies. Built on secure cloud infrastructure, the system is scalable and designed to support organisations of all sizes.

Onboarding

As the successful applicant progresses through customisable onboarding journeys, all information entered at this stage, such as name, address, and contact details, will automatically populate their People First profile. This eliminates the need for manual re-entry and ensures a seamless experience. Applicants have the flexibility to enhance their profile by adding additional details, creating a comprehensive record that reflects their professional and personal information.

The onboarding portal within People First provides organisations with a centralised and efficient system for distributing policies and procedures to new starters, ensuring that all employees begin their journey with a clear understanding of organisational expectations and standards. Authorised users, such as HR administrators, can monitor which employees have completed the required policy readings and acknowledgements, enabling them to identify any blockers and send notifications to encourage completion.

In addition to supporting compliance, the portal enhances engagement and retention by offering a structured onboarding experience that sets a positive first impression and reduces early attrition. Candidates can view and accept job offers, and access key documents before their start date, which helps mitigate risks during notice periods and streamlines pre-employment processes.

As a single-database system, People First ensures that all data entered feeds into one central source of truth. This approach maintains accuracy, consistency, and integrity across the entire system, supporting efficient operations and a positive onboarding experience.

Talent

People First Talent Management provides a people-centred framework designed to empower, motivate and retain employees while strengthening organisational performance. The system supports employee wellbeing and resilience by offering tools that encourage engagement, motivation and continuous development. Its flexible, accessible design enables employees to work effectively from anywhere, supporting hybrid and remote working models and ensuring a positive, intuitive user experience.

The system identifies individual competencies and skills, highlights development needs and supports job matching by aligning employee strengths to suitable roles, projects or future opportunities. Competency frameworks and a detailed skills taxonomy cover behavioural, practical and technical capabilities, enabling clear mapping of current skills and future potential. A forward-looking roadmap includes AI-driven skills gap analysis and enhanced successor insights to support strategic workforce planning.

Talent profiles form the foundation of succession planning. Each employee has a profile capturing skills, competencies, achievements and performance ratings. Managers can assess potential, morale, readiness to progress and the impact of loss, supported by a nine-box grid that combines performance and potential to inform strategic decisions. These insights help organisations strengthen their internal talent pipeline and retain critical capability.

Performance management is delivered through regular, structured check-ins, enabling goal setting, progress tracking and ongoing development planning. Goals can be public or private, with clear visibility of milestones, achievements and overdue items to maintain accountability and momentum.

Engagement and recognition tools further enhance the employee experience. The news feed, polls and community spaces enable two-way communication, ensuring employees feel heard and connected, whether through work-related groups or shared interests. Recognition features allow colleagues to celebrate achievements and meaningful contributions, with award badges being introduced to further promote morale and appreciation.

Workforce Management

People First Workforce Management (WFM) is designed to optimise workforce operations, reduce administrative burden, and align staffing with organisational goals. It integrates seamlessly with People First HR and Payroll, creating a single source of truth for time, scheduling, and pay data.

The functionality includes absence and attendance management, enabling real-time recording and analysis of employee absence and attendance to improve compliance and accuracy. Flexible scheduling and shift planning tools allow managers to create schedules without skills gaps, using colour-coded views and configurable work types. These schedules can be viewed by teams or individuals across day, week, or month formats, and changes such as reassigning shifts or moving rest days can be managed easily.

Time recording and clocking features include clock-in software with geo-location to prevent fraudulent logging, automated application of pay and entitlement rules, and live views of clock-in data against schedules. Policy and compliance support ensures multiple policies and working patterns are enforced fairly, reducing compliance risk through accurate and transparent data.

Employee self-service tools empower staff to manage their own schedules and time via a mobile-friendly interface, boosting engagement and productivity. Real-time dashboards provide analytics and insights into workforce performance, helping managers make informed decisions and avoid overstaffing.

Overall, People First WFM delivers productivity gains by ensuring the right people are in the right place at the right time, reduces costs by cutting administrative effort and preventing unnecessary staffing, supports compliance and accuracy, and enhances employee engagement through autonomy and transparency.

Learning

The Learning Experience Platform (LXP) within People First is a modern, learner-centric system designed to transform how organisations develop and upskill their workforce.

The platform delivers a tailored learning experience aligned to individual goals, career aspirations and organisational skill requirements. Employees can access a wide variety of formats including e-learning modules, videos, documents, curated playlists and bite-sized content that supports continuous development. Learning paths help guide employees towards specific objectives, ensuring that both current role requirements and future career development are supported.

Compliance training is managed through automated recurring courses, with dashboards highlighting overdue or upcoming renewals to ensure mandatory requirements are met. Event management tools enable the scheduling and coordination of face-to-face training, remote sessions and digital learning activities. Employees can easily sign up for courses, with configurable approval workflows where required, and course completion is recorded directly on the employee profile.

The LXP incorporates collaborative and social features that enhance engagement and knowledge sharing. Notifications, learning profiles and personalised content recommendations help connect teams, encourage participation and provide employees with direct access to the development resources they need.

Advanced reporting provides administrators and managers real-time insight into learner progress, performance and course effectiveness, supporting data-driven decisions across the organisation.

The People First LXP empowers employees to take ownership of their learning journey while providing the organisation with a powerful, integrated system to build capability, support compliance and drive long-term growth.

Payroll

The People First Payroll module offers a real-time payroll engine, saving organisations time by streamlining core payroll processes, whilst verifying legislative items are compliant and ensuring employees are paid consistently and correctly on time.

The module allows organisations to free up the traditional payroll cycle and the time pressures to validate the payroll. The module also offers automatic reconciliation, real-time processing and eliminates manual errors. People First Payroll enables users to minimise risks, increase efficiencies, reduce costs, boost productivity, and strengthen employee satisfaction.

The module reduces the risk of any financial hardship to employees and reduce peaks in workload as People First Payroll enables errors to be addressed in real-time, rather than a batch at cut-off.

With People First Payroll, HR no longer need to wait to update people records until after payroll cut-off - they can continually process new starters, leavers and updates to records - so your new starters don't have to wait until the following month to be paid because they didn't meet the cut-off - enhancing employees onboarding experience.

One of the most powerful features of People First is real-time payroll. Unlike legacy systems that batch data and delay visibility, People First gives employees access to their payslip throughout the month. They can see earnings, deductions, and adjustments as they happen - no more surprises on payday.

This transparency helps employees budget more effectively and significantly reduces the volume of payroll queries. For payroll teams, it means fewer last-minute corrections and more time to focus on strategic tasks. Errors can be identified and resolved immediately, not days before payday. It's a game-changer for both accuracy and employee trust.

Analytics

People First democratises data, giving you a complete picture of your entire platform and making it easy to action. It provides key insights across several dashboards that help you identify key trends, anomalies, and actionable insights to better the employee experience.

View this information at a department or team level or get a general overview across your whole organisation – helping you identify key trends and pinpoint what is going well to champion it, and what isn't to be able to provide a fix to it.

Decentralise that data too, putting the data in the hands of team and department leaders so they are also enabled to make key decisions for their teams, allowing a much faster response and helping optimise the employee experience.

The analytics in People First move away from just presenting numbers, to providing qualitative data too with tools such as sentiment analysis that provides more context to how employees are feeling – enabling you to act sooner and have your finger on the pulse of your organisation.

To collate and manipulate data from various reports within People First, can utilise the Data Explorer tool. Data Explorer allows users to build custom queries, select specific data fields, define filters, and apply time ranges. This tool enables you to slice down data in the system, choose your own headings and filters, and save previous reporting styles for efficiency. Additionally, you can export the query results to CSV for further analysis or manipulation. Data Explorer offers a user-friendly interface, making it intuitive and easy to navigate.

Customers can integrate with the Business Intelligence (BI) tools of your choice using the People First Analytics API connection. Bring Your Own BI (BYOBI) enables you to extend the value of your people data to drive operational excellence and take data directly from the data lake (processed clean data) into your BI tools, or into your own data warehouse. This includes eco-systems such as Fabric where the API connection can be the pipelined to unlock the interoperability capability of your corporate data.

People First APIs can integrate with BI tools such as Power BI, GoogleLooker, Qlik, and Tableau, allowing organisations to apply their own analytics and AI models

AI

People First integrates Artificial Intelligence across its recruitment, talent management, workforce management and payroll modules, delivering a more efficient, intelligent and engaging employee experience. These AI capabilities are designed to support you in streamlining HR operations, enhancing decision-making and strengthening employee wellbeing.

Within recruitment, AI-driven CV parsing automates the extraction of important information from an applicants CV, such as work history, education, skills, and contact details when they are applying for a position. It streamlines the application process for candidates by reducing the need for manual data entry. Candidates can submit their resumes quickly and easily, leading to a more positive experience with the hiring organisation. CV parsing ensures consistency and accuracy in the way candidate information is recorded and stored within the recruitment module. This standardised format makes it easier for recruiters to search, filter, and compare candidates based on specific criteria.

Optical Character Recognition (OCR) technology within People First enables receipts to be scanned and automatically converted into expense claims, reducing the need for manual data entry and saving time for employees and managers alike. The functionality reads and extracts key details such as date and amount from images of receipts (such as train tickets or travel expenses) and populates the corresponding claim fields automatically. Due to the mobile nature of People First, employees can complete and submit expenses remotely using the mobile app or any connected device. Together, these features simplify the expense process, ensuring that travel and subsistence costs are captured efficiently and consistently across the organisation.

In support of employee engagement and wellbeing, sentiment analysis assesses qualitative feedback from employee check-ins, enabling managers can identify morale trends, emerging issues and areas requiring early intervention. A built-in profanity filter maintains professional standards across internal communications by identifying and flagging inappropriate language where necessary.

Furthermore, within check-ins, AI can suggest tailored talking points to help managers explore potential objectives in line with role responsibilities and organisational priorities. Once the check-in has been closed, AI can generate a summary of the discussion and propose suggested objectives based on the conversation between the manager and employee. By using AI to guide and summarise conversations, line managers are better equipped to set clear, relevant, and achievable goals that align individual performance with organisational strategy. It also reduces the administrative burden on managers while strengthening employee engagement through well-defined, meaningful objectives.

Conversational intelligence further enhances usability by allowing users to interact with the system through natural language. Employees can ask questions in plain English and receive immediate insights from People First's workforce data without requiring technical reporting expertise. The AI Assistant supports users by drafting content, answering HR queries, summarising information and assisting with tasks such as configuring absence rules or managing onboarding activities.

Technology, security and compliance

HR and payroll data is often the most sensitive personal information that organisations hold and requires significant protection.

people first is a multi-tenanted SaaS application deployed and hosted on Microsoft Azure cloud, a world class cloud infrastructure.

Key technical benefits of a People First deployment:

- zero maintenance required by the customer - no setup or patching overhead for your IT team, MHR continually do this for you out of hours.
- Industry leading security - through Microsoft datacentres and our secure development life cycle
- future proofing – MHR and Microsoft constantly deploy new innovations and expand the service offering.
- Resilience and reach - Microsoft Azure has over 40 data centres globally giving MHR global reach and our three regional deployments each have secondary pairings.

Global deployment locations

Deployment region options	Primary location	Secondary location
UK	UK - West	UK - South
US	US - East	US - Central
Asia	Asia - South East	Asia - East

Uptime and recovery

Recovery point objective:	4 hours
Recovery time objective:	12 hours
Availability target:	99.8%
Automatic updates (out-of-hours):	Every 2 weeks

Certified to:

ISO 9001:2015 · ISO 27001 · Cyber Essentials Plus

Compliant:

Data Protection Act 2018 · GDPR · ISO 45001 · ISO 31000 Risk-Management · ISO 22301 Business Continuity Management

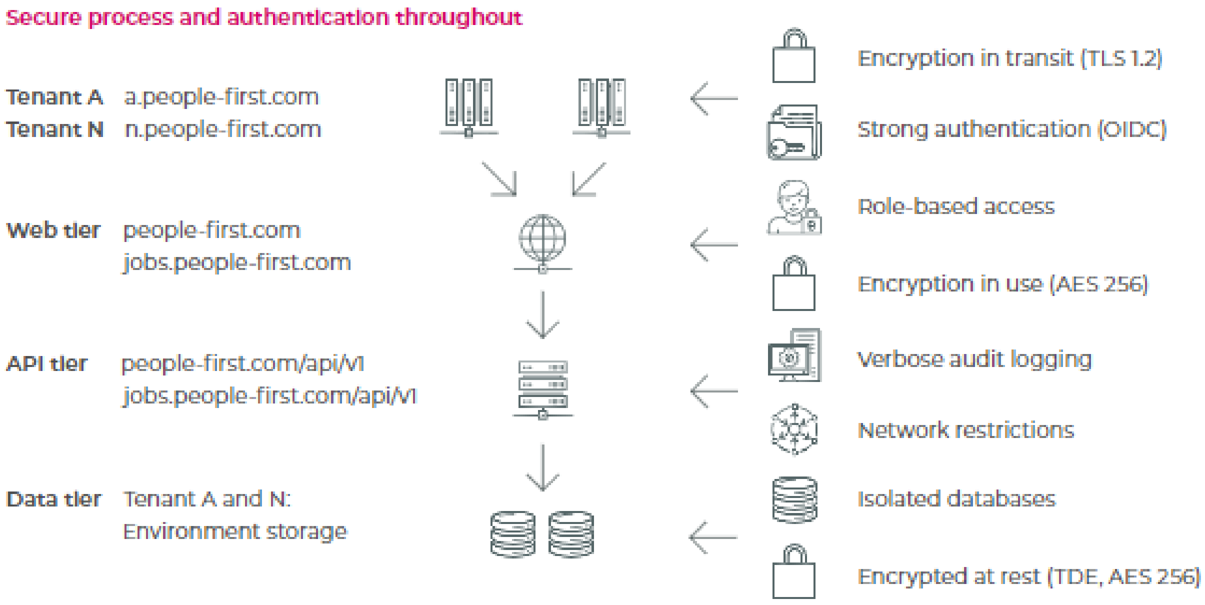
Security has been folded into People First's architectural design from the start:

- Encryption at all levels - all traffic is encrypted in transit using HTTPS, all data is encrypted at rest using transparent encryption AES 256. certain sensitive data is encrypted in use using AES 256.
- audit is enabled at all levels in the product, web, application and data. this gives our operational team full view of activity. operational teams activity outside of the product is audited as well.
- data is separated - each environments data is stored separately from other environments; data is not mixed.

- secure development - security requirements are considered upfront before work starts. developers use secure coding techniques (e.g. OWASP TOP 10), all code gets peer reviewed and automatically tested for vulnerabilities. finally people first also get spent tested annually.

People First was designed for integration and customisation:

- single sign-on - bring your own identity provider, People First supports Azure AD, OKTA, Google and other Open ID connect providers. if you don't have your own identity provider, don't worry people first comes with People First SSO available.
- rich integration - with more than 800 API end points it is possible to deeply integrate to third party applications.
- OData - if you wish to create your own custom reports you can do this easily through our OData API. OData can be accessed natively through Power BI, Excel and other data products.
- individual sub domain - every customer gets their own sub domain for their environment such as “mycompany.people-first.com”



GDPR

People First is fully compliant with the Data Protection Act and GDPR. Organisations can set retention rates, define a privacy statement that needs to be accepted by users and provide a SAR available in a single download.

Retention periods can be defined within People First, either months or years, meaning information is automatically deleted after the set time selected, ensuring compliance with Data Protection.

People First enables organisations to define their own privacy statements in the system, which can be displayed to users upon logging in. This can be issued to users to read and accept, and can also be modified as required.

People First enables quick and easy extraction of all data held against a user for subject data access requests, a report is available in system to facilitate these requests. This can be completed by a system admin with no need for assistance from MHR. Employees can request for information of their personal data at any point.

Approach to Integrations

People First includes standard integrations with:

- Docebo - LMS
- Wagestream - Financial Wellbeing
- Cronofy - Calendar synchronisation
- Broadbean - Job Board posting

People First has an open API library which can be accessed through https://docs.people-first.com/api/ and explains many areas of possible integration through the event stream, webhooks, OData and APIs. This provides customers with the ability to integrate to virtually any 3rd party system, as long as the other system also has API's or a method of automating data extraction or data upload (e.g flat file).

MHR also has an Integration Services team who can build integrations to customer requirements. All integrations are fully scoped and built on a time and materials basis. MHR use MS IaaS (Azure Logic apps / Function Apps) for integration. This allows us to flexibly integrate data with any 3rd party system that has APIs or can accept a flat file. It allows transformation and manipulation of the data between the calling and receiving systems and any additional customisation as required for each integration, removing the need for direct a system-to-system integration to be coded into the product. Logic Apps can be designed to understand the data structure, transform it and then load into the 3rd party system. All Logic Apps will be built in the customer Azure tenant giving the customer full control and ensuring the data resides in their infrastructure.

Standard connector and recipes for integrations are built via a third party solution, Workato. Customers purchase specific integrations themselves or MHR can host recipes in our own Workato instance.

Implementation Approach

Our implementation approach is based on a shared effort between MHR and yourselves.

People First is intuitive; meaning businesses can be up and running in a matter of months. It offers you a way to simply, quickly, and effectively pay, manage, connect, and engage your people. Therefore, saving you time, money, and resources, while maintaining your compliance obligations, all within a secure platform.

Our expert consultants focus on providing advice, guidance, support, and knowledge transfer so that you have complete confidence using the system. They will operate to MHR best practice standards and provide regular activity reports to keep you updated on progress made.

All implementations are delivered remotely as part of the fixed fee, fixed project plan. However, The MHR delivery methodology leads with remote consultancy with the emphasis placed on transfer of knowledge to your internal project leads to ensure you can make a smooth transition to Business as Usual, become self-sufficient in terms of system knowledge and to start driving your return on investment. Additional support can be offered whether in terms of additional training, communication, and engagement for go live launch and ongoing utilisation of the system functionality.

MHR's Implementation Team

The right project resource from both sides is a key part of ensuring project success. MHR, will assign a core project team which will work with your team throughout the implementation lifecycle and will include, as a minimum.

- Programme Manager
- Project Manager
- Transformation and Adoption Lead
- Project Team Members (Lead HR, Lead Payroll and Lead IT/Technical)

Project Manager & Programme Manager

Your dedicated Project Manager and Programme Manager will work closely with you to ensure the project aims and objectives are being met and manage any change processes during the implementation phase.

Transformation and Adoption Consultancy

Our transformation team will suggest and develop a key stakeholder adoption plan, followed by a wider communications plan which may be used to launch People First, to ensure maximisation of adoption by the entire organisation.

We will assess the complexities of the organisation to develop and suggest the implementation phasing and timeline to ensure successful launch of People First.

As it is / to be process reviews will be completed to support the adoption and smooth launch of People First across the multiple entities and payrolls.

Consultancy

Our expert HR, payroll, and technical consultants are focussed on providing advice, guidance, support, and knowledge transfer of People First to give your project team confidence in using your chosen solution. Our consultants are system experts that will operate to MHR best practice to design and implement your chosen system. To keep you updated on progress, our consultants regularly complete Activity Reports so you can clearly see progress being made.

The consultancy team will work with your key stakeholders at each step of the implementation process to ensure all users are confident and competent in the configuration and use of People First. Knowledge articles, 'hack' videos and supporting documents are readily available on the service desk. Customised user guides may be created if required.

Support and Training

MHR prides itself on offering an implementation approach that is refined over 40 years and exhaustively tested by delivering over 3,000 successful projects. This means that MHR are the experts and ensures your team is fully supported during the implementation and into the adoption of this critical project.

Our approach incorporates six key stages, in which our experts support your team every step of the way through a structured process to deliver success. We will ensure that your team is confident, knowledgeable, and able to support future business needs ensuring the expected business benefits and return on investment is achieved.

Stage 1 - Setting up the project for success
We will work with you to establish the critical benefits expected, benchmark the current operations, and ensure that the remaining implementation stages are focused on achieving the identified and agreed benefits.
Stage 2 - Design
Together we work to fine-tune the design of the solution, including all processes, employee experience, and integration with any other solutions. At the end of this phase all parties will

sign off the blueprint documents. We will then build the initial solution, unit test, and return to you for user acceptance testing (UAT).
Stage 3 – UAT
We will work with you to test the solution and measure the results. It is usual to identify some improvements during this stage which is the primary purpose of UAT.
Stage 4 – Go-live
We will work with you to migrate the data to your new solution and prepare for go-live. It is likely at this stage that one or two parallel runs are completed to ensure compliance and accuracy with your requirements. We will be there to support your reconciliation of payroll and costing and support the embedding of your HR and payroll processes. At go-live we will continue to support your team in the “cut-over” process and immediate time after go-live.
Stage 5 – BAU
We will work with you to embed the new processes into your organisation. Undertaking any post-go-live project reviews, identify any project lessons, and plan the roll out of any additional modules. We will also start to measure and realise the initial business benefits and arrange a handover to our support services teams.
Stage 6 – Closedown of Project
Once all your modules have been implemented, we will undertake a final project review with your team where we will look at the business benefits realised. Following closure of your project your main points of contact will be your Account Manager (AM) and MHR support services teams.

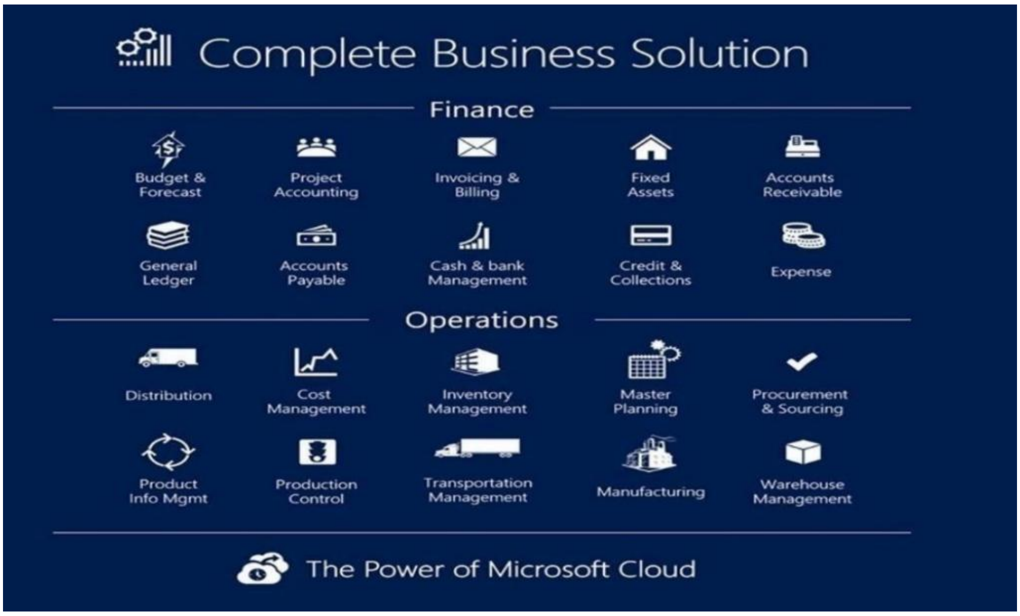
5 FINANCE (D365)

5.1 Microsoft Dynamics 365

MHR provides two distinct Microsoft Dynamics 365 finance solutions to meet different organisational needs: Dynamics 365 Finance and Dynamics 365 Business Central. Both are part of Microsoft's intelligent cloud ecosystem, but they serve different segments and operational complexities.

Dynamics 365 Finance is a full-featured ERP solution making it ideal for large enterprises or organisations with complex, multi-entity operations. It offers advanced capabilities for global financial management, compliance, and automation. Key features include:

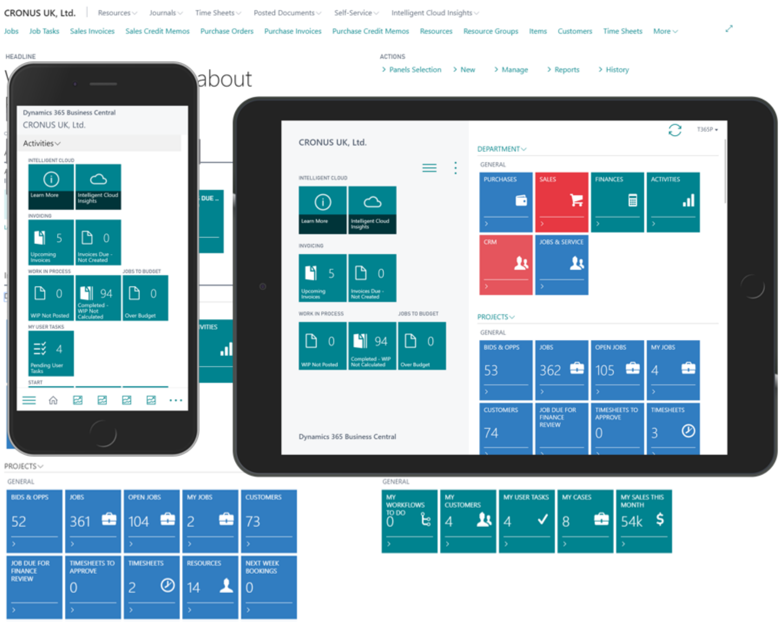
- Multi-company and multi-currency support for international operations.
- AI-driven forecasting and budgeting for predictive insights and scenario planning.
- Advanced automation for vendor invoice processing, collections, and recurring revenue.
- Deep integration with Microsoft Power Platform and other Dynamics 365 apps for unified processes.
- Regulatory compliance across multiple jurisdictions.



This solution is best suited for organisations requiring enterprise-grade scalability, complex workflows, and robust governance.

Dynamics 365 Business Central, on the other hand, is designed for SMEs and mid-market organisations. Business Central is a flexible, all-in-one business management solution that combines finance, supply chain, and operations in a single platform. Key benefits include:

- Rapid deployment and ease of use, making it ideal for organisations seeking quick ROI.
- Integrated financials and operational processes without the overhead of a large ERP.
- Customisable extensions via Microsoft AppSource for industry-specific needs.
- Cloud-native architecture with automatic updates and strong security.



Business Central is perfect for organisations that need a modern, cost-effective solution with strong finance capabilities and room to grow, without the complexity of an enterprise ERP.

5.2 IBM Planning Analytics with Watson

With IBM Planning Analytics with Watson, MHR can offer an integrated planning and analytics solution to finance teams so that you can do all your planning, forecasting, budgeting and ad-hoc reporting in one place, speeding up decision making and improving decision quality.

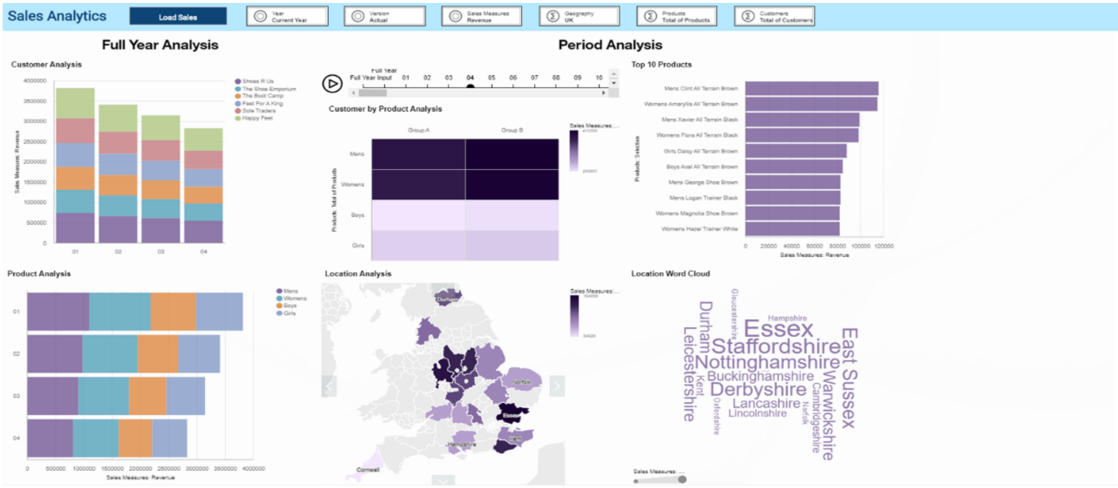
The platform automates manual tasks, for faster planning cycles and report preparation. It also makes it easier for users to interact with business data, track KPIs and link financial plans with operational tactics. The solution integrates Watson, IBM's machine learning system, making it simpler for finance team members to carry out what-if analysis, test alternative assumptions and to infer trends.

The key product capabilities are:

Guided planning - With the guided planning feature, finance managers can create customised workflows to widen participation in the planning process. They can also create plans with multiple stages, invite participants, set due dates and maintain a bird's-eye view of progress.

Interactive workspace - The workspace is a highly visual web-based interface that can be customised according to user requirements and access privileges. It provides a single view of KPIs and an easy-to-use hub for monitoring performance, evaluating plans and testing the impact of alternative courses of action.

Through the intelligent queries function, users can ask a question to interrogate business data, plus multidimensional queries allow ordinary business users to observe data from various viewpoints and spot trends.



Automated planning processes - With IBM Planning Analytics, all plans, budgets and forecasts exist in a single application, changes to one live plan will automatically update and flow to other linked plans.

From the moment data enters the system, your centralised business rules are applied automatically. New budgets and plans can be created in moments, and tied in automatically to your forecasts, giving up-to-date visibility on where performance sits relative to budget and objectives.

Excel option - The IBM Planning Analytics for Excel add-on enables finance and business professionals to work with the familiar Excel front-end but with the full capabilities of IBM Planning Analytics.

Visualisation options - The IBM Planning Analytics Workspace makes it easier than ever to tell a compelling data story. Automated visualisation options include charts, maps, images and shapes, plus text and video.

Finance managers can easily generate dashboards and scorecards linked to plans and budgets and share them across the organisation, making it easier for business users to measure performance in the context of their specific roles.

Self-service modelling - With IBM Planning Analytics you can take existing plans, budgets and forecasts as a starting point and change virtually any operational variable(s), immediately seeing the ripple effects across the organisation. In this sandboxed environment, users can test and compare assumptions and assess multiple possible courses of action for faster decision making.

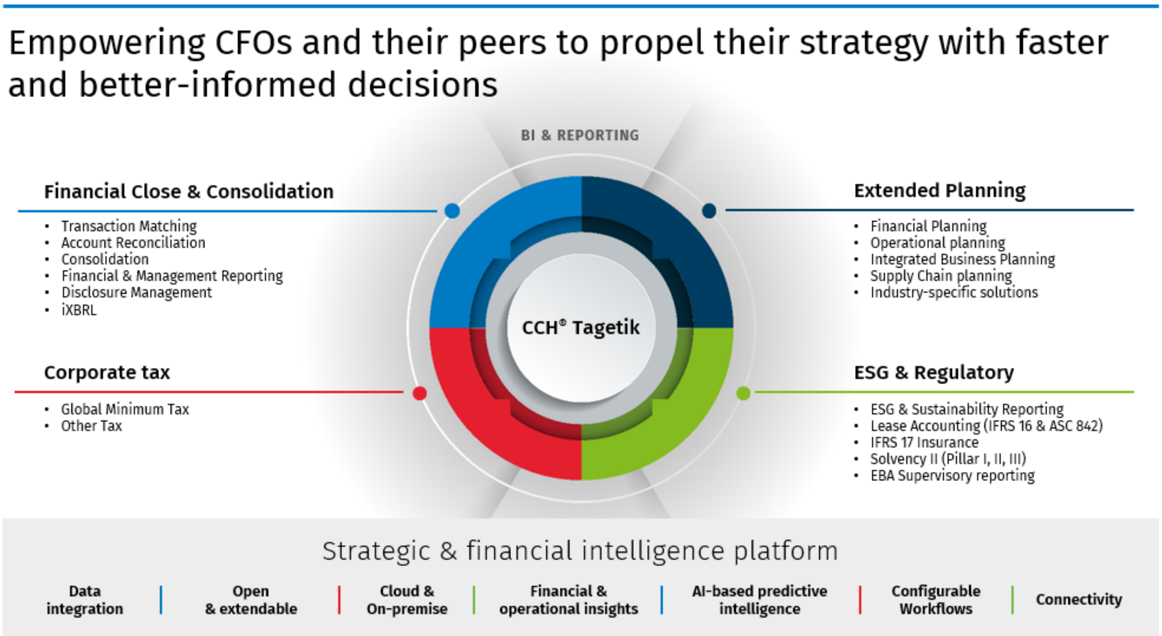
Predictive forecasting - Inbuilt statistical algorithms can assess historical values within your data to assess trends and seasonality patterns. Once a prediction has been generated, the statistical details page provides an explanation of how it was generated - including which specific algorithm was deployed, and why.

Multidimensional analysis - Planning Analytics can access, integrate and analyse multiple data sources for comparative analysis of information from all relevant systems, including data from enterprise resource planning tools, general ledger data and business intelligence (BI) sources. Through the "hierarchies" capability users can perform in-depth analysis using "attributes" to describe the characteristics of products, customers, regions and more. This allows detailed consideration of, for example, customer and product profitability.

6 CCH TAGETIK

CCH Tagetik is a complete corporate performance management platform with advanced analytics capabilities. It enables you to automate and streamline complex and time-consuming tasks such as financial close and consolidation, financial reporting and disclosure.

It also provides you with an automated toolkit for managing specific compliance obligations such as IFRS 15 and IFRS 16. By unifying all processes, plans and data in a single solution, CCH Tagetik enables integrated real-time continuous planning across the entire organisation. You can delve deeper into your data for insightful profitability analysis, generate more precise cash flow projections, reduce risk and tackle problems early on.



The key product capabilities are.

- Budgeting, planning and forecasting - Establish a single source of truth for all levels of planning – strategic, finance and operational. Data from sales, HR and all other functions feed directly into your strategic plans, as well as your P&L.
- You gain better oversight on performance by comparing real-time results against planned projections. Operational leaders can assess how well their units are performing in the context of the wider health of the business and analyse performance of the organisation at every level.
- Advanced analytics and predictive planning - CCH Tagetik's Analytics Information Hub brings together diverse data sources from across the organisation and any external data. With no specialist technical skills required, it is possible to put together detailed, driver-based models and multi-dimensional scenarios.
- Predictive intelligence & Artificial Intelligent capabilities, provide the business with objective AI for efficiency, Generative AI & explainable predictions that show the 'why' behind your numbers whether it is planning or reporting data, highlighting the key variables required to manage and focus on what matters.
- Financial close and consolidation - Build a quicker, less error-prone and agile financial close and consolidation process. You can automate the entire financial consolidation

process, complete trial balance imports, intercompany reconciliations, journals and reporting – all in a single platform.

- Balance Sheet & Cash Reconciliation - You can set risk rules, which can then be defined globally or assigned to specific accounts. These rules can alter the workflow of the account, ensuring 'high risk' accounts undergo higher levels of approvals before submission.
- Production cost planning and control - Centralise data from all departments to automatically populate your plans with the most current information. This ensures your production cost planning and control process is properly aligned to your organisation wide plan. It also helps ensure that all relevant departments in production, such as sales and logistics, are aligning their activities around realistic budgets.
- IFRS 16 / FRS 102 / UK GAAP Lease Accounting - CCH Tagetik offers a pre-built end to end application designed to address specific lease accounting regulatory requirements. Tagetik also helps with Insurance (IFRS 17), iXBRL, Solvency II, FINREP and COREP, Revenue Recognition and more.
- ESG reporting – An end to end pre packaged ESG solution that includes Defra conversion factors and everything needed to comply with any ESG framework or produce any external facing reports such as the annual report or to provide customers with the emissions numbers they need. Companies increasingly are mandated to define, measure and report on their strategies to ensure long-term sustainable growth.

7 CLOUD DELIVERY

Our iTrent service is a fully hosted cloud-based application delivered to you from MHR's own secure and private UK data centres. The only requirements of customers to access the solution is a client device with an active internet connection and supported web browser.

The service is provided with an uptime SLA of 99.8% 24/7/365.

The infrastructure and service are fully managed, maintained and monitored by MHR's dedicated cloud services team. The cloud services team's sole responsibility is to ensure smooth running and availability of the hosted service.

Our People First offering is a cloud native SaaS application that is hosted in Microsoft Azure.

People First is developed and managed inhouse by MHR and is provided as an always on service delivered to an uptime SLA of 99.8% 24/7/365.

The only requirements of customers to access the solution is a client device with an active internet connection and either a supported web browser or our mobile Application available from the Apple and Google Play store.

7.1 Business Continuity

The controls documented in Section 4.3.2 Scope of the ISO 22301 Business Continuity Management System are used as the basis for the Company's Business Continuity Planning arrangements. These controls comprise:

- Identifying potential risks and impacted business processes/activities through a business impact analysis (BIA).
- Defining and implementing a business continuity strategy.
- Defining an incident response structure, warning and communication process, and developing effective business continuity plans.
- Establishing the ability to receive, document, and respond to any national, state or local risk advisory system.
- Establishing business continuity documentation processes.
- Establishing communications processes during a disruptive incident.

Implementing a business continuity training and exercise program to ensure proper execution of the plan.

The main overall objectives of MHR's business continuity planning are:

- Pre-determine what constitutes the need to declare a business continuity incident.
- Establish an alternative headquarters for the company within 24 hours of a major incident or complete loss being declared.
- Inform all customers and all employees of the situation and our plans on the basis of how they have been affected and what they need to know to make their own contingency plans.
- Assign sufficient technical infrastructure (power, people, computing capability, communications capability) to allow continued operation of essential business services e.g. managed services and professional services.

- Provide a limited computer service for the internal accountancy/payroll service within 48 hours of a declared major disaster. Provide a fuller range of operational area services within 72 hours of a declared major disaster. This service will include the Customer Support Call Logging System, the customer relationship management system and key development areas.
- Provide development/support environments internally within 7 days.

7.2 Security and Peace of Mind

The highest levels of security have been implemented at our data centres. In addition to 24-hour manned security, the premises are monitored by perimeter beam technology and high-definition, night enabled CCTV cameras with full recorded history. Within the building, access to each individual office is controlled and monitored by the use of electronic card security - staff only have access to the areas and offices that they operate in. To ensure complete peace of mind, 'Criminal Records Bureau' checking and clearance is carried out organisation wide.

ISO/IEC 27001:2013 MHR is certified to the Information Security Standard ISO/IEC 27001 for all locations and operational areas. The assessment was undertaken by BSI and follows a 12 month internal program based on the continued commitment to the principles of confidentiality, integrity and availability of information. Of particular importance has been the widespread use of risk assessment methodologies and technology to support the implementation of strong policies in such areas as password management, anti-virus measures and business continuity.

The current and increasing degree of dependence on information systems and services means that organisations are potentially ever more vulnerable to security threats and failures. Certification to ISO 27001 involves successfully demonstrating the required level of control to protect the valuable assets and rights of individuals and companies and of compliance to all applicable legislation. Indeed, independent research shows significant benefits for companies which have achieved certification and for their clients including:

- Improved risk assessment planning and control
- Providing a clear signal of best practice being employed in the area of information security.
- Minimising business risk by ensuring controls are in place to reduce the risk of security threats.
- Helping to ensure compliance with applicable legislation.
- Enhancement of customer and trading partner confidence

Particularly, there is increasing focus on the possible negative effects of failure of business continuity arrangements and the company's risk assessments, business continuity plans and supporting resources have all been defined at departmental level in addition to infrastructure and services contingency planning. The following observations from the LRQA report support the value of this approach:

> "Good commitment to the ISMS [Information Security Management System] was noted from the top down." And
>
> "All auditees displayed a good understanding of the information security issues relating to their work."

Access to Sensitive Data: This is obviously an issue at every one of our customer’s sites. Our consultants continually access sensitive data in their day to day tasks and are aware of the implications of the Data Protection Act. A confidentially statement can be drawn up and signed if required.

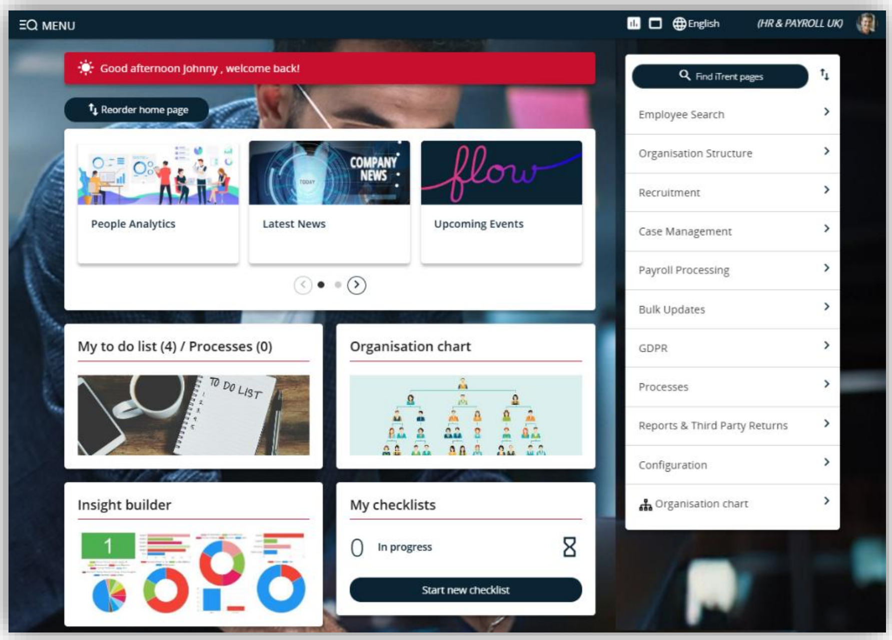
MHR is certified to the ISO 9001: 2015 Quality Management System Standard. The quality management system is applicable to design, development, installation, maintenance and support of commercial and business solutions, including consultancy and customer training. It is also applicable to the provision of managed services for the operation of commercial software and support of business processes.

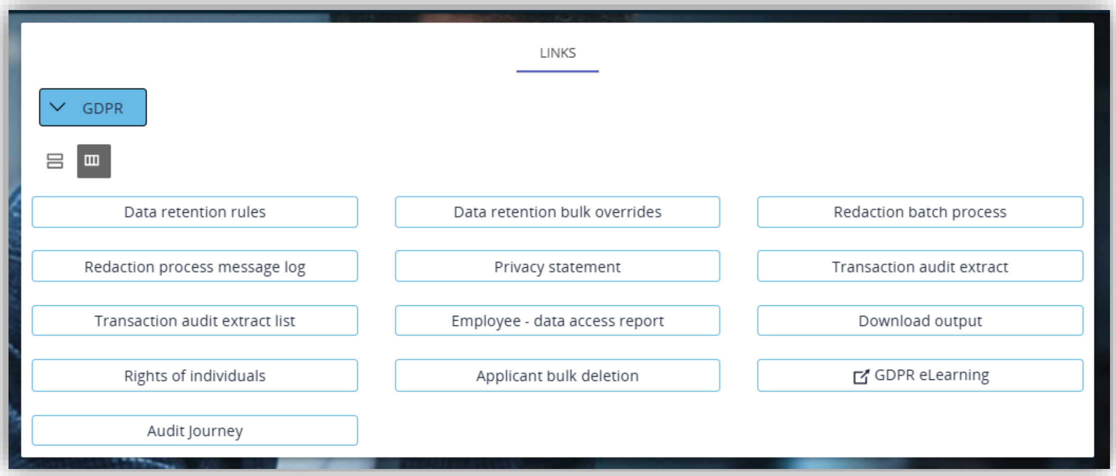
MHR is Cyber Essentials plus certified.

SOC2 reporting and control framework is audited by KPMG to the international ISAE3402 standard, this ensures independent assurance on a rolling 12-month cycle.

7.3 GDPR

iTrent provides the foundation for GDPR compliance. MHR commits to maintaining GDPR compliance as part of the legislation updates provided with the system in the release cycle. A main system user can easily access the GDPR functionality via the quick links functionality on their homepage as shown below.





GDPR functionality

The system offers multiple areas of functionality to maintain GDPR compliance, as described below:

Data retention rules

The system has data retention functionality. Authorised users can apply data retention schedules to individuals or groups of individuals and this retention period can be applied to leavers and also to applicants. The system comes with a minimum retention period set (in years) however authorised users can override the stated period with their own retention periods in line with their requirements, allowing for overrides when there is a justified reason for keeping the data longer for your organisation. Notes can be added to the system to record the justification.

All documents will use this retention rule, which is attached to the employee and will be effected when they leave. For example, once the employee leaves, 6 years after that date is reached all data is redacted such as documents, notes and any other personally identifiable data and there is no option for it to be retrieved. This allows for a skeletal record to be retained for leavers only so that appropriate historical information can be maintained for reporting without the underlying personal details displayed. For example, if you are reporting on posts in a department over a period in time, the post data will be shown in the report as a blank area. This indicates where personal information of a leaver would have been.

In addition, any applicant data from requisition campaigns that has a retention period applied will delete all data and no record will be maintained. Part saved applications will also be removed after a year if the applicant has not logged in to their account in that time.

Privacy Policy

The system provides the functionality to link to a privacy policy. The privacy policy can be configured within the system. The privacy policy provides the functionality to pop up when a user logs into the system. This policy can be formatted and include hyperlinks. When the policy pops up in self service the user must accept the policy electronically before they can gain access; they must confirm that they agree to the policy to progress. This meets the compliance to the fair, lawful and transparent GDPR requirement as the data controller can provide evidence that consent has been provided.

The customer can also decide to what group of users the privacy policy is published. The systems transaction audit details functionality can then be used to view the results when the response has changed from no to yes.

Audit

The system has a user audit journey facility that presents a view of the audit journey for a user, including the reports run and a download of the data. The journey provides the user with the ability to drill down into further details.

The audit journey provides a view of view what was being run. In the event of a breach, an audit report can be produced providing identification of its source.

The system also has change notification functionality. When a user makes changes on certain security settings, an audit form will appear informing them that their actions are outside the rules of GDPR, and whether they wish to continue. The changes that are made will be auditable. This helps with the education of users to understand what a breach is comprised of, and if their actions are likely to result in a breach.

In addition, the system is also able to provide auditable sensitive categories of data. Special categories of personally identifiable information will be auditable, including sensitive information, bank details, salary, pay scale values, contact details, next of kin, payslips, social security, union membership, passports and miscellaneous details. Alongside this, sensitive information like bank account numbers will be disguised in the traditional format where most of the code is masked. This ensures that data is processed with the appropriate security needed for personal data, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organisational measures.

Data access requests

The system has a simplified administration process for data access requests. A data access report will present all data in relation to that individual. The system has a core form for data access requests that allows the user to select the employee and the type of data.

Users can create output files (including document attachments) that can be sent to the employee.

Recruitment

The systems recruitment functionality has the functionality to restrict the collection of data to only that which is necessary to the purpose for which it was collected. They can also include a reason for data collection. In addition, web recruitment includes a notification of processing when 'refer a friend' is used.

Rights of individuals

The system has the functionality to provide rights of individuals management of information access where the data subject has restricted disclosure or withdrawn consent. A simple tick-box is used to restrict access to special categories of data for example – the sickness reason. This will address the principle of personal data needing to be adequate, relevant and limited to the sole purpose use.

8 MANAGED SERVICES

MHR's investment in automation has created an industry first for outsourced HR and payroll, a fully automated end to end payroll process. The results have revolutionised our delivery and created a world class service, enabling MHR to keep your employees pay at the heart of our service. Delivered out of our secure Nottingham based service centre, MHR has a centre of excellence delivered by over 100 qualified payroll and HR professionals who are equal to any customer engagement.

We are consistently processing at an industry leading accuracy in excess of 99.99% and partner with our customers to identify where savings can be made through enhanced business process change and data analytics. We make in excess of 500,000 payments per month and give personalised payroll and HR advice to over 8,000 people every month. We work in many business sectors including both public and private with all our services delivered by dedicated, professional UK based staff.

Data should flow from the point of creation into the system without intervention. Data is validated by our automation technology before processing, triaged with you if any discrepancies are identified and reprocessed. The consequent reports are produced automatically using systems that are under strict change control. We utilise best practice payroll control, balances and checks to complete the payroll. All data is processed through secure networks ensuring we meet all the relevant security standards. All staff are security cleared to a number of different levels depending on the requirement of the customers.

The level of control, automation and standardisation we apply to our processes ensure our level of service is maintained to an industry leading standard week in week out, month in month out. You will benefit from our investment in automation through error or omissions being trapped, highlighted and dealt with in a timely manner before they impact anyone. We own the system and all the software we use so it its always compliant with legislation and industry best practice.

8.1 Fully Managed Service

Optimised data flow	✓
Automation of data processing	✓
Payroll and schedule management	✓
Tax Code and Student Loan Processing	✓
First and final GTN including full report suite	✓
Payroll checks, balance and controls	✓
Payroll Compliance certificate	✓
RTI compliance and processing	✓
All payments, Payslips, P45s & P60s (online, email or printed)	✓
Auto-enrolment	✓
Costing Files & General Ledger	✓
Annual Salary or Bonus processing	✓
System Administration (Upgrade, testing and installation)	✓
Legislation Compliance	✓
System Compliance	✓
Employee payroll Helpline	✓
Customer community	✓
Payroll Statistics	✓

Customer Portal	✓
Third party remittances	✓
Service Management	✓
Dedicated payroll analysts	✓
Payroll and Workforce Analytics	ADD-ON
P11Ds	ADD-ON
Bespoke Payroll Checks	ADD-ON
Pre Payroll Analysis	ADD-ON

8.2 Payroll Processing Service

Our service assists you in working smarter. Our managed service team run payroll with industry best practice controls and provide you with a payroll control certificate that validates the payroll output. The service frees up your time to focus on employee queries and resolutions. Payments will be made securely by us and we keep you compliant with HMRC requirements.

Eslips	✓
Tax Code and Student Loan Processing	✓
First GTN and full report suite	✓
Final GTN and report suite	✓
RTI compliance (FPS, EPS)	✓
Auto-enrolment	✓
Payroll checks, balance and controls	✓
Costing Files General Ledger	✓
Dedicated payroll analysts	✓
Knowledge library	✓

Service Level Agreement: A service specification will be agreed as part of the service level agreement (SLA), designed to meet all your needs. This document details all the relevant activities and the party responsible for their performance. The SLA is treated as a living document throughout the lifetime of our partnership and is reviewed on a regular basis. This approach enables MHR to offer a much more flexible service to our customers. Through future dialogue and further due diligence at the next stage of your procurement process, we will agree on a thorough SLA to meet all of your service requirements.

Service Reviews: MHR will also host regular service review meetings which provide a forum for discussing service performance and looking forward to future requirements. Key agenda items include performance for the preceding period covering service levels, key performance indicators, proposed solution changes, future requirements and the service level agreement. We also deliver monthly service accuracy reports, which are followed up by a telephone review with your lead MHR service administrators to guarantee accuracy and service quality.

Service Management: True collaboration and a thorough understanding of your needs is our top priority enabling us to provide the best possible service. A customer relations manager (CRM) will be your main point of contact with regular meetings to discuss and identify enhancements, improvements and cost savings in your service.

As well as being assigned a CRM, you will be allocated to a service team. The team will be your main point of day to day operational contact. Within each team you will have assigned a suitably experienced HR and payroll analyst (reporting to the team leader) who will look after the management and production of your service and will be your first point-of-contact for any service issues. The teams consist of the same experts and professionals who were involved in the new business transition, guaranteeing continuity of service.

8.3 Payroll Services

Our legally compliant services meet your specific performance standards, whilst allowing you and your employee's access to data through self-service. To make your life easier everything is supported by powerful management information reports and dashboards.

MHR looks after the processing of your payroll through to the production and distribution of payslips and P45/P60s along with real time submissions to HMRC. Our service also covers absence management and pension auto-enrolment.

We enable gross-to-net calculations, absence processing, RTI, payment services, legislative compliance, and the distribution of electronic payslips (or printed payslips). Alongside BACS and payslip services we also handle EPS, FPS, P45, P60, BACS and payslip transmission, third party payments and standard control reports. As a result, you save costs of printing, payslip distribution, training and transmissions.

With our payroll service you can:

- Reduce administrative tasks: automate and streamline your processes to deliver improved services levels, plus guaranteed legislative compliance and payroll self-service.
- Ensure accurate payroll management: reduce risk to cash flow and employee satisfaction by eliminating payroll errors and ensure reliable payroll data consistently informs key business decisions.
- Ensure compliance: reduce risk and ensure real-time availability of accurate payroll data to managers, employees and eternal bodies.
- Gain payroll insights: deliver value to your organisation with data insight to drive business decisions.
- Ensure quality of service and security: externally verify the effectiveness of your management systems with independent certification to ISO 9001, ISO 27001 and SOC2 standards.
- Mitigate risk: through a dedicated payroll team who provide a consistent and reliable payroll service.

8.4 BACS Payments

MHR is also able to submit your BACS file on your behalf with the following benefits:

- Security
- Secure acceptance of files
- Encrypted transmissions
- BACS approved bureau.
- Audited
- Adhere to security, confidentiality, integrity and availability guidelines.
- Bureau reference B77115
- Automatic retrieval of submission reports

- Dedicated communications link to BACS
- Workflow to ensure deadlines are not missed.
- Audit trail of transactions
- Disaster recovery option

8.5 Managed Pensions

As previously detailed, MHR is able to offer its sophisticated Pensions Data Service (PDS) and Pensions Admin Service (PAS) to supplement this area as required.

9 IMPLEMENTATION

MHR offer all our implementation services remotely, continuing to use best practice remote methods of working, which have been tried and tested through our years of experience delivering solutions and services to the public sector.

The remote implementation team will support the customer throughout the entire project life cycle, from scoping to go-live. Using our robust governance and communication toolkit, our project managers and expert consultants will be able to ensure we deliver the outcomes required.

We are currently starting our projects with a remote project initiation meeting, that sets out how we will operate together, throughout the project. A remote communication strategy that works for both the customer and MHR will be designed and agreed.

We use a range of online tools, with Microsoft Teams being our preferred tool. We are now successfully delivering projects using Microsoft Teams for video conferencing, easily sharing and switching screens during meetings and document sharing. It also allows meetings to be video recorded and reviewed later by those that couldn't attend. Our teams are also experienced at using other technology, including Skype, WebEx and Zoom.

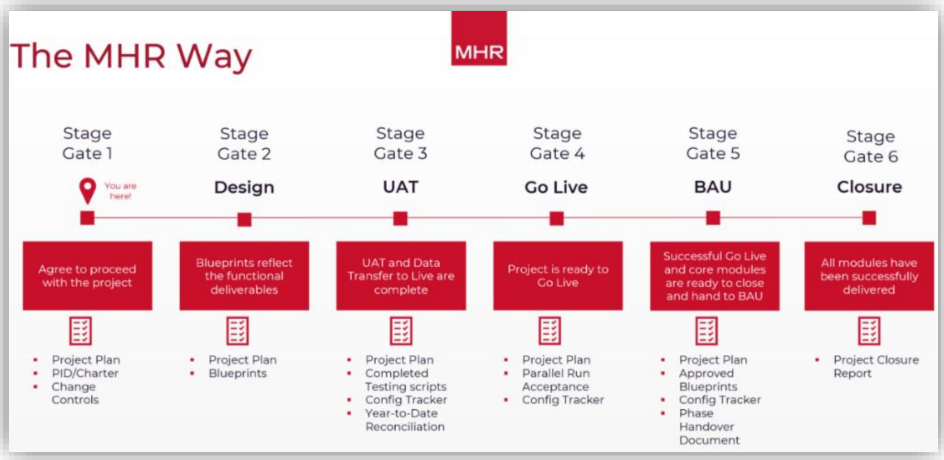
9.1 Setting the Standards

We aim to deliver excellence in implementation support to ensure that our customers gain maximum benefit from their product investment. Our team of HR, payroll and technical professionals use a proven implementation methodology that has evolved over many years of successful implementations to meet the highest quality standards. Beyond the initial implementation, we also offer a range of supporting services to ensure that our products continue to deliver maximum business benefits.

9.2 Approach

Our project approach is based on PRINCE2 methodology and is the same tried and tested approach we use on every project we undertake. There are key milestone sign off points at the end of each defined stage to ensure that both parties are happy to move forward.

The process can be explained as follows (For guidance only)



Project Start Up: This phase of the project includes the project initiation meeting and sets out the governance for the project, including contingency plans, benefits and confirms the members of the project board and project assurance team. We will also create your three iTrent environments at this stage and your core team will attend the Introduction to iTrent course to start the building of knowledge of the iTrent solution.

Design

Data Migration: Throughout the implementation there will be points where you need to provide us with your data. Where this data is to be uploaded into iTrent standard templates will be provided. We will support you with advice and guidance on how to populate these templates correctly. To ensure the accuracy and quality of your data, we would always recommend that a data cleansing exercise takes place prior to migration.

Build Walkthrough and Final Blueprint Documentation: To ensure you are prepared, initially we will provide introductory system awareness (video based). Your core implementation team will then attend walkthrough workshops with our consultants where we will use your environment to guide you through the standard business pack build that forms the basis of your solution. They will also explore the variations agreed (agreed within the contract). We will document the approach for your needs.

Detailed Documentation of your system needs will allow you to validate your requirements prior to build. This Documentation will include configuration relating to the standard business pack as well as your variations if applicable.

Should you identify additional requirements outside of project scope, our expert consultancy will support you in assessing your options and how our solution can support your business. We will then document the solution using version control alongside the change control process. This approach will ensure these design requirements are clearly captured, providing visibility of the end solution as well as any cost and time considerations to inform your business decisions.

Once completed, together we will review and approve the design document before commencing the build.

User Acceptance Testing (UAT): Once your iTrent solution has been configured by MHR, we will copy the master configuration into your Test environment and load your data. This forms the basis for the UAT.

We will provide a set of testing scenarios and scenario based scripts to test that the functionality that has been built works as expected. You can add to this set of scripts if there are specific areas you need to test, and we will provide the scripts in a document that enables both parties to track progress.

Any configuration changes identified in the UAT will be made, retested and on joint agreement, the master build in Live will be updated.

On completion of testing both parties will sign off that the project is ready to move into parallel run and the Live customer data, including year to date information, will be provided to load into your Live environment.

Go Live: We will support you through parallel running of iTrent payroll alongside your legacy payroll system. Following the dual entry of all changes and transactional information to iTrent, you will be provided with the required level of validation reporting to enable signoff before moving into live running. Our consultants will support in that reconciliation exercise and on joint agreement we will move the project into Live processing, culminating in the first BACS payment from iTrent.

BAU/Closure: After the successful transition to Live, with knowledge transfer completed, the solution will be signed off and you will be ready to move into Business As Usual (BAU) support. We will, of course, remain on hand to deliver ongoing support through our network of support services. At the closure of each project, MHR conducts a lessons learned exercise to identify things that could be improved so that the process of implementation can be continually developed by MHR. These reports are shared with all of the implementation consultants and project managers to ensure that we continually improve the implementation process and make efficiencies. In addition the design documentation relating to your configuration is held centrally in MHR such that the Service Desk and others, as operational necessary, can access should they need to for any future investigation of issues.

Our consultants have a broad range of skills and are able to offer business consultancy in all areas of the iTrent application. In addition we can:

- provide assistance with business process improvement.
- help you to develop personnel and payroll best practice.
- undertake bespoke development, e.g., interfaces and ad-hoc reports.

9.3 The Team

Our consulting team consists of experienced professionals from all disciplines and includes specialists in project management, human resources, payroll and information technology. Their goal is to ensure that you obtain maximum benefit from using MHR's portfolio of products. Using proven methodologies and supported by companywide experienced personnel, the team is powerfully equipped to deliver expert services to our customers. Their level of knowledge is extensive, many holding formal qualifications in their discipline.

9.4 Training

The training that we provide will begin by taking you through an introduction to iTrent, focusing on the following key HR and Payroll activities, including:

- Navigation and system basics
- Organisation structure and inheritance
- Starters, leavers, transfers
- Payroll information
- Maintaining employee records
- Absence Input

This gives you a solid foundation to understanding how iTrent supports your HR and/or Payroll processes. Further training on specific functionality or modules will be delivered at the relevant points, as per the overall scope of your project.

Our 24x7x365 service cloud offers ongoing access to our comprehensive suite of iTrent user guides should you need to recap on any of the set up and maintenance knowledge in the future.

10 SUPPORTING SERVICES

MHR provides a range of standard services designed to ensure all our customers are supported during and after implementation and throughout the contract lifetime.

10.1 MHR Assist

Assist is our premium service designed to help customers maximise the value of their investment in MHR solutions. Customers purchase blocks of support hours, giving them access to a dedicated pool of expert consultants who provide system support, configuration, and advice whenever needed.

Assist delivers consistent, on-demand consultancy without the need for advance planning or full-day bookings. Whether you require small-scale configuration at short notice, guidance on a software release, or general advice on your iTrent or People First system, Assist provides flexible, responsive support.

This service is ideal for organisations seeking a combination of remote system administration, advice, and hands-on configuration support.

Assist also supports customers who have invested in MHR's reporting and analytics tools. Our Analytics team partners with customers to provide ongoing BI and analytics services, helping them grow and mature along their analytics journey.

Our BI specialists bring years of experience and act as a virtual extension of your team—not only supporting your analytics environment but actively enabling its development. Assist can cover:

- Ongoing maintenance of critical business reports
- Ad-hoc requests and troubleshooting
- BusinessObjects system maintenance and upgrades (for non-hosted customers)

A high-level overview of the Analytics offer includes both reactive support and structured, planned services. Ad-hoc queries are handled in line with your remaining hours. For existing reports, customers provide the report names and current versions for review (a chargeable service). The Analytics team then advises whether optimisation is required or if the reports can move straight into the support agreement. New report development is scoped and delivered separately before transitioning into the ongoing support arrangement if required.

Once in place, MHR's Analytics team can take full responsibility for editing and maintaining your reports. All changes follow a defined change control process to ensure quality and consistency.

10.2 LearnNow

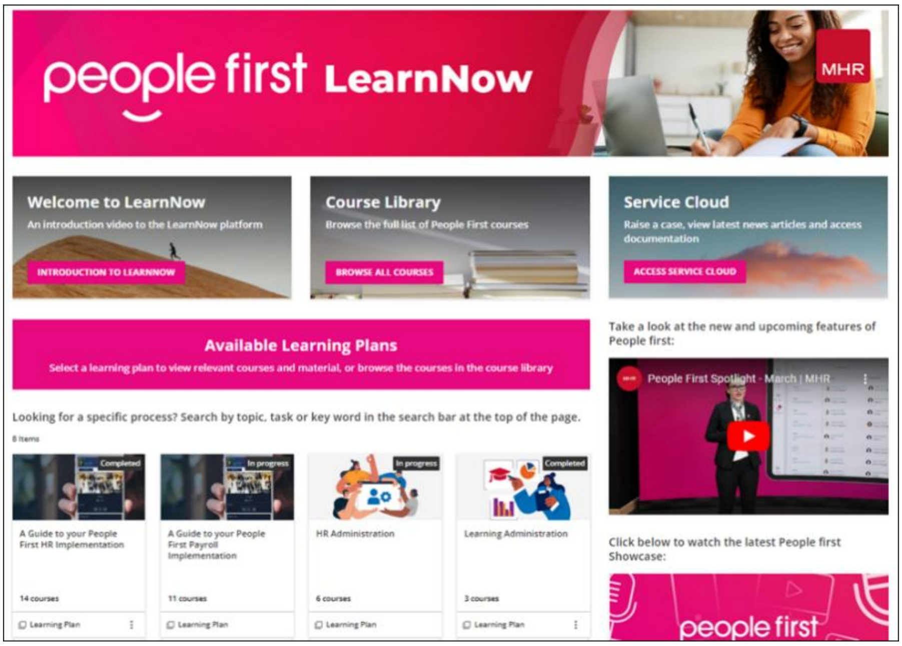
LearnNow is an online, digital, learning library which is designed to offer supporting material and lifelong learning across your key users. Access to LearnNow is provided for all of your key back-end users including, but not limited to, System Administrators, HR teams and Payroll teams.

Varied levels of experience are taken into consideration with specific materials being targeted to different groups such as new starters to your key back-office teams, existing users wanting to learn new skills, or users requiring refreshers of key, day-to-day, processes.

LearnNow is available to support both iTrent and People First products. The format and style of the content varies depending on which product you have chosen, and the detail required for learning various areas of the system, but you can expect to find:

- Process steps

- Videos
- eLearning
- Product update summaries



10.3 Support Overview

Standard Support: MHR provides a range of services designed to ensure all our customers are supported during and after implementation. Our standard support includes:

- Service Desk logging, available via the customer portal and with a manned service desk available from 09.00 to 17.00 hours (Monday to Friday excluding English bank holidays). Through a dedicated support line customers are able to contact the service desk whereupon each call is given a unique reference number. The call is assigned to the appropriate member of the support team for resolution and is owned and tracked at all times by the service desk. This is communicated to the customer once the issues are solved.
- A customer portal where customers can log new calls, track the progress of open calls, browse frequently asked questions, view closed calls and receive forward notice of imminent releases. The web site also enables customers to download upgrades and patches as well as all available documentation. A rolling two week patch and fix schedule is published on the extranet, as is an up-to-date list of all existing patches and fixes.
- the customer portal comprises a powerful search facility of existing support materials (e.g. documentation, articles, patches, calls) and is available 24/7.
- a Account Manager who will discuss with you your ongoing support. Regular scheduled meetings with your customer relations manager ensure you are able to obtain the most from your implementation.
- access to the MHR professional services team for a broad range of services including training, business process improvement and business consultancy.

10.4 Support Team Experience

Your first port of call is usually with a member of our front-line service desk who are experienced in our own solutions and usually with at least two years employment working elsewhere in the business. This team is assisted by the product planning, product support and product development teams.

We have continued with our programme of investment in respect of staff training and now have 95.5% of our service delivery teams qualified or studying in CIPP and CIPD.

10.5 Account Management Team

The account management team is responsible for strategic matters, service reviews, optimising the relationship between MHR and you (in terms of value for money), customer visits and commercial discussions. Although rarely needed, an escalation process is defined within the standard terms and conditions enabling any problems to be dealt with effectively and in a controlled manner by the team.

10.6 Planning & Research

Our planning and research team comprises professionals who have either worked in senior HR & payroll positions, gained qualifications in payroll or have extensive experience of payroll business practices. The team monitor the emerging business requirements in payroll and HR through:

attendance at HMRC Software Developers Meetings; these are held several times a year, dealing with all e-business matters.

- attendance at British Computer Society Payroll Specialist Group Meetings; held several times a year. Representatives from the HMRC and other Government departments update software developers on current and planned future initiatives.
- a close relationship with the HMRC, leading to our being invited to take part in consultation exercises and critiquing documentation prior to release by the HMRC.

The team regularly feedback findings to customers through a series of events and publications, by:

- hosting customer panels
- attending customer user groups and forums
- Running regular online Webinars
- Delivering podcasts and producing blogs
- issuing annual legislative briefing documents
- hosting Year End roadshow seminars to communicate changes and help payroll staff plan for the impending Year End.
- Early customer (Beta) programmes to elicit feedback during the development of new features.

The team also host twice yearly IPP Regional (Nottingham) meetings.

10.7 User Groups

MHR hosts events at our MHR Campus that customers are encouraged to attend to learn about future developments and to have their input as what they would like to see developed. MHR also runs regular remote customer events via webex.

Regular regional and industry specific user groups are run throughout the year by users which are supported by MHR.

10.8 Customer Panels

Customer panels are an integral part of our feedback process and are held on a regular basis. These panels enable customers to have a direct input into the development of the software and service provided by MHR. The panels also give customers a good opportunity to network and establish best HR & payroll practice.

This document is strictly private and confidential between MHR and CCS. All correspondence entered into by MHR is subject to contract.

Freedom of Information Act 2000

MHR regards this proposal and associated documents as commercially sensitive and their disclosure under the Freedom of Information Act 2000 would seriously damage the commercial interests of MHR.

MHR

Thank you

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