



Overview

Prepared by Tom Inglis

Aug 16, 2021

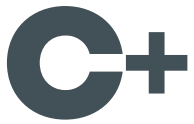


Introduction



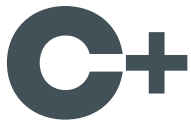
What is Cenefits?

- A web and mobile application which makes it easy for corporate and public sector buyers to **manage, measure and realise benefits in their contracts.**



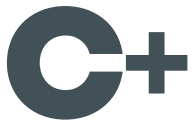
What is it used for?

- Cenefits is used to realise:
 - **ESG**
 - **Social Value**
 - **Community Wealth Building**
 - **Inclusive Growth**
 - **Sustainable Procurement**
 - **Equality Outcomes**



What can you do? (i)

- **Automate the collection of evidence and scores** for the benefits in your contracts, saving you time and money.
- **Measure the performance of your contracts and KPIs** in real time through an intuitive dashboard and **Red / Amber / Green** statuses.

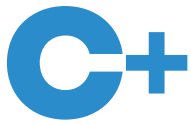


What can you do? (ii)

- **Filter and download reports** to help you to realise your benefits, answer your stakeholders, and celebrate your successes.
- **Share a national platform**, where suppliers have a single account per user and a standardised way of inputting data.

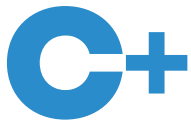


Initial Setup



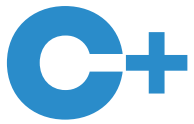
Creating Filters

- Create custom Benefit Categories and Priorities, Contract Categories and Priorities, Departments, Locations and a Portfolio structure.



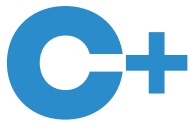
Creating Benefit Templates

- Create custom “Benefit Templates”, giving you the flexibility to define your own KPIs or to use a third party framework for Benefits that are to be used in more than one Contract.



Inviting Employees

- Invite Employees, who can be assigned as Administrators, Contract Managers for particular Contracts, and Project Managers for particular Benefits.

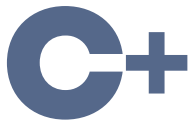


Adding Organisations

- Add Suppliers and Delivery Partners (Community / Parish Councils, Social Enterprises etc), whose users can be invited and assigned to Benefits.

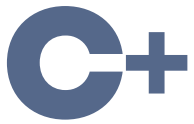


Creating Contracts



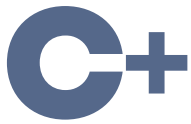
Creating Contracts

- Create and edit Contracts, assigning one or more of your Employees as Contract Managers, and one (or more if a Framework Contract) of your Suppliers.



Creating Benefits

- Create Templated or Unique Benefits and associate them with Contracts.
 - Enter one or more Delivery Dates for each Benefit.
 - Assign Project Managers, a Supplier, and Delivery Partners to each Benefit.

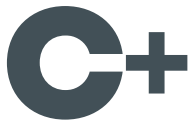


Import Templates

- Download Excel (XLS) or OpenDocument (ODS) templates for Contracts, Templated and / or Unique Benefits.
 - Fill out the information for new Contracts and Benefits.
 - Import up to 100 Contracts or Benefits in one action to save the time it would take to input them one at a time.



Publishing Contracts



Publishing Contracts

- Contract Managers can mark Contracts as Unpublished or Published.
- This controls whether or not Project Managers, Suppliers and Delivery Partners have access to their Benefits.
- They are notified by email when a Contract is published.

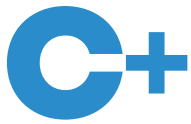


Delivery Dates

- Project Managers, Suppliers and Delivery Partners are notified by email a week before, the week of, and a week after each Delivery Date.
- The emails contain a direct link to the view where they can upload Evidence of activity.
- If they miss a Delivery Date, the Contract Manager is informed by email.

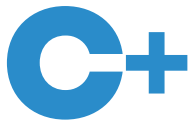


Capturing Evidence



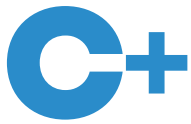
Uploading Evidence

- For each Delivery Date, Project Managers, Suppliers and Delivery Partners must provide a textual update and can attach one or more documents / photos as evidence.
- They must submit it for approval by a Contract Manager.



Checking Evidence

- Contract Managers are sent an email when an Project Manager, Supplier or Delivery Partner submits evidence for approval.
- They must review the text and any documents / photos uploaded, and then either approve or reject it.
- If they reject it, they can enter a reason, and the Evidence submitter gets an email asking them to make the requested changes.

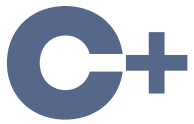


Benefit Statuses

- Contract Managers maintain the status of each Benefit:
 - Not Started, In Progress, Delayed*, Abandoned, Delivered, Partially Delivered*, Not Delivered, Substituted*
 - If they select the statuses marked with a * they can enter an explanation.

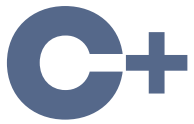


Capturing Scores



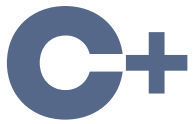
What are Scores?

- Project Managers can score each Benefit with a Merit, Pass, or Not Completed (Organisation / Supplier / Delivery Partner) rating.
- Suppliers can also score each Benefit, but with a Good, Satisfactory or Poor rating.
- The purpose of scoring is to provide feedback to both parties, so that they can celebrate successes or make improvements in future.



Uploading Scores

- When a Contract Manager marks a Benefit as Completed, Project Managers and Suppliers are sent an email asking them to provide a Score.
- They must provide a textual update and can attach one or more documents / photos as feedback.
- They must submit it for approval by a Contract Manager.

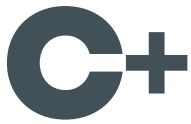


Checking Scores

- The process for approving or rejecting Scores is the same as for approving or rejecting Evidence.



Monitoring Performance



Red / Amber / Green Statuses

- **Red / Amber / Green** statuses are automatically calculated for Contracts in real time, based on the number of Benefits and the amount of Benefit Value, Benefit Points and Emissions Savings that should have been delivered.

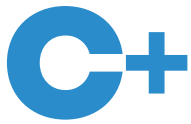


Dashboard

- View performance data on an intuitive Dashboard in real time:
 - Contract Values and Red / Amber / Green Statuses
 - Templated Benefits Count
 - Contract Priorities Count
 - Benefit Priorities Count

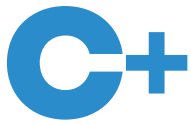


Downloading Reports



Contracts Report

- Filter the Contracts you have access to and export an Excel (XLS) or OpenDocument (ODS) file containing:
 - Contract Details
 - Number of Benefits, Benefit Value, Benefit Points, Emissions Savings Delivered
 - Contract Priorities Delivered

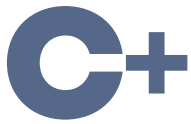


Benefits Report

- Filter the Benefits you have access to and export an Excel (XLS) or OpenDocument (ODS) file containing:
 - Benefit Details
 - Project Manager, Supplier, Delivery Partner Evidence
 - Project Manager, Supplier Scores
 - Benefit Priorities Delivered
 - Links to the Check Evidence and Score Views



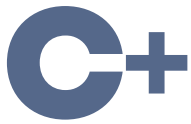
More Information



Product Website

- Our **Product Website**, which contains a succinct summary of the application's benefits and pricing is available here:

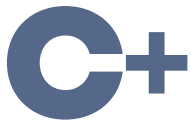
<https://cenefits.com>



Support Website

- Our **Support Website**, which contains more detailed instruction in how to use the application, as well as our most frequently asked questions is available here:

<https://support.cenefits.com>



Digital Marketplace

- Our entry in the UK Government's **Digital Marketplace**, which explains how public sector Buyers can subscribe to Cenefits is available here:

<https://link.cenefits.com/1A-E>



Any Questions?

Please email us:

hello@cenefits.com