In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, you will be excluded for further evaluation.

**Please provide only Yes or No in the Space provided. ‘Yes’ is a pass and ‘No’ is a fail.**

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| --- | --- | --- | --- | --- |
| **Name of requirement owner** | **Essential**  | **Item** | **Requirements** | **Bidder Response**  |
|   |   | **A** | **Integrations** |  |
| CRM | E | 1 | The platform must be able to integrate with WorkBooks CRM via an API |  |
| IT | E | 2 | The platform must be able to integrate with Zoom (our main delivery platform for webinars) via an API so virtual events are automatically created in Zoom when set up in the event management platform, and attendees checked-in |  |
| Web | E | 4 | The platform must be able to integrate with a third-party payment processor, e.g. Stripe. The majority of our events are free of charge to attend but there are instances where we pose an attendance fee or exhibition fee, so we need to provide a seamless way to take payments through the platform |  |
|   |   | **B** | **Event Website / Registration Page** |  |
| Web | E | 7 | It is essential the website/webpage is mobile-responsive for ease of accessibility |  |
| Events | E | 10 | It is essential that the website/webpage can be password protected or private as we often run events that are invite-only |  |
|   |   | **D** | **Ticketing Setup** |  |
| Events | E | 24 | It is essential for the platform to allow for multiple ticket types with different user journeys to be set up so we can tailor the experience for users. E.g. In-person delegate, Virtual delegate, Speaker etc |  |
| Events | E | 25 | It is essential the platform can work for multi-day events as we have some events which are run over 2 or 3 days |  |
| Events | E | 27 | It is essential the platform allows for the number of tickets be limited so we can align with venue capacities |  |
| Events | E | 29 | It is essential there is a mechanism that allows delegates to register onsite at a physical event as we often get people turn up that haven't registered so we need to capture their information |  |
|   |   | **E** | **Registration Form** |  |
| Events | E | 32 | It is essential the platform allows the customisation of form fields so we can collect specific information from our audiences |  |
| Events | E | 33 | It is essential the platform allows unlimited custom questions to be added as we have a variety of standard questions, we ask our audiences plus bespoke questions depending on the programme |  |
| Events | E | 36 | It is essential there is a way to add a waiver (T&Cs) that people must agree to before registering as we need delegates to consent to us processing their data |  |
| Web | E | 37 | It is essential the registration form is mobile-responsive for ease of accessibility |  |
| Events | E | 40 | It is essential the platform allows for the display of certain questions according to the ticket type selected so the user journey is tailored |  |
|   |   | **F** | **Ticket Fees & Payments** |  |
| Events | E | 42 | It is essential the platform allows for different pricing options or offers for each ticket (e.g. early-bird) so we can customise the fees for different audiences |  |
|   |   | **G** | **Delegate Communications/Management** |  |
| Events | E | 53 | It is essential the platform allows for fully customisable emails be sent out via the system so delegate communications can be handled in the one place |  |
| Events | E | 54 | It is essential that specific emails can be sent out depending on ticket type, so the user experience is tailored |  |
| Events | E | 57 | It is essential the platform allows attendee information and responses to be edited |  |
| Events | E | 58 | It is essential the platform has a mechanism for name badges to be downloaded or printed to avoid manual processes  |  |
|   |   | **H** | **Reporting** |  |
| Events | E | 60 | It is essential the platform provides customisable reports so we can report on different aspects of our events |  |
| Events | E | 61 | It is essential the platform provides a way to generate a report of registered attendees and their details so we can review information on our delegates |  |
| Events | E | 62 | It is essential the platform allows reports to be created across multiple events so we can compare data |  |
| Events | E | 63 | It is essential the platform provides a way for reports to be shared with internal and external partners, so users do not have to download and email reports |  |
|   |   | **J** | **Additional Tools/Features** |  |
| Events | E | 70  | It is essential the platform has a way to create and send feedback surveys so we can manage everything within the one platform |  |
| Events | E | 75  | It is essential the platform has a way to manage exhibitors so they can upload logos, profiles, content etc |  |
| Events | E | 76  | It is essential the platform has a way to manage speakers so they can upload photos, biographies and presentations |  |
| Events | E | 80  | It is essential the platform has a feature where delegates can upload papers, abstracts, presentations so these can be reviewed, judged and collated rather than submissions being received via email |  |
|   |   | **L** | **Cyber and Data Security** |  |
| IT | E | 88 | It is essential the platform support Multi-Factor Authentication, and this is enforceable for all users |  |
| IT | E | 91 | It is essential the platform data reside in the UK |  |
| IT | E | 92 | It is essential data is encrypted in transit between end user devices and the service |  |
| IT | E | 93 | It is essential data is encrypted in transit between internal components |  |
| IT | E | 94 | It is essential data is encrypted in transit when exposed to other external services, such as an API |  |
| IT | E | 95 | It is essential the platform is subjected to regular penetration testing |  |
| IT | E | 96 | It is essential you have independent security reviews of the platform design |  |
| IT | E | 97 | It is essential you have a documented framework for security governance and risk management |  |
| IT | E | 98 | It is essential you have a documented vulnerability management process with agreed timescales for mitigation |  |
| IT | E | 99 | It is essential you use automated build pipelines which enforce security requirements |  |