Annex 1 – Requirements

This table shows the list of requirements against which the bidders should write their response. Bidders should write their response into this template.

Along with the response to each requirement, the bidder should complete column three with only: Yes, No, Partial, Develop or N/A

Yes – the bidder is fully compliant with this requirement

No – the bidder does not support this requirement

Partial – the bidder partially supports the requirement and a further explanation can be input to the notes in the final column.

Develop – this requirement is in development or that the bidder is willing to develop this. Further explanation can be input to the notes in the final column.

N/A – this is an information question that does not require any of the above responses

In addition to this template, bidders are free to submit supplementary information to support their response.

Please do not add any rows/columns to the body of the table. If you need to add extra information add extra rows at the end of the table and highlight in a different colour.

|  |  |  |  |
| --- | --- | --- | --- |
| Item  No. | Requirements | Yes, No, Partial, Develop or N/A | Supplier Response |
| **A** | **Event Management** |  |  |
| 1 | Can the system manage event budgets? |  |  |
| 2 | Can a suite of templates be set up with an event schedule builder/custom text and images? |  |  |
| 3 | Does the system have a photo gallery where all of our images/logos can be uploaded? |  |  |
| 4 | Individual task management |  |  |
| 5 | Checklists and worksheets for event management? |  |  |
| 6 | Venue booking and management? |  |  |
| 7 | Contract management and electronic signatures? |  |  |
| 8 | Hosting files e.g. venue contracts, invoices, delegate reports etc? |  |  |
| 9 | Online collaboration with other users, e.g. task management, calendar coordination? |  |  |
| 10 | Unique url for third party access to real-time delegate data |  |  |
| 11 | Does the platform integrate with other email marketing programs? Details? |  |  |
| **B** | **Registration page features - including marketing and comms** |  |  |
| 12 | Does the platform work for multi-day events? |  |  |
| 13 | Is there a "waiting list" option for when tickets sell out? |  |  |
| 14 | If so, what information can be captured here? |  |  |
| 15 | Can Expressions of Interest become accepted registrations, without resubmitting details? |  |  |
| 16 | Can you customise form fields to collect specific information? |  |  |
| 17 | Is there a way to add a waiver that people must sign before registering? |  |  |
| 18 | Is there a place to display point-of-contact information? |  |  |
| 19 | Can registration materials be customised with the KTN brand or brand of the event owner? |  |  |
| 20 | Can the registration confirmation page and email be customised? |  |  |
| 21 | If so, can this be tailored depending on ticket type and/or what information was selected during registration? |  |  |
| 22 | Is the registration form mobile-responsive? |  |  |
| 23 | Can we display the event location map? |  |  |
| 24 | Can delegates share on social (Twitter, Facebook, LinkedIn, etc.) - are there social media links? |  |  |
| **C** | **Ticketing - pricing and purchasing** |  |  |
| 25 | Set up Multiple Ticket types |  |  |
| 26 | Can group tickets be created? |  |  |
| 27 | Create different pricing options (fixed pricing, open/flexible pricing) or offers for each ticket (e.g. early bird, discount codes) |  |  |
| 28 | Can we set up free tickets? |  |  |
| 29 | Can you limit the number of tickets offered? |  |  |
| 30 | Can tickets be password protected? |  |  |
| 31 | Is there a per-ticket credit card processing fee? Details? |  |  |
| 32 | Is there a per-ticket service fee? Details? |  |  |
| 33 | Are there fees in addition to those mentioned above? Details? |  |  |
| 34 | Can fees be absorbed into the price of the ticket? |  |  |
| 35 | Can fees be added onto the ticket price? |  |  |
| 36 | Is there a waiting period to receive funds for credit card payments? Details? |  |  |
| 37 | Does the platform integrate with third party payment processors? Which ones? |  |  |
| 38 | Is there a way to accept and process refunds? |  |  |
| 39 | Are receipts / invoices automatically generated? |  |  |
| 40 | Can purchased tickets / registrations be downloaded to PDF files? |  |  |
| 41 | Can attendees pay for registrations in instalments? |  |  |
| 42 | Do tickets include scannable codes? |  |  |
| 43 | Can ticket buyers edit ticket information? |  |  |
| 44 | Can ticket buyers transfer ownership of tickets? |  |  |
| 45 | Can delegates cancel their own tickets? |  |  |
| 46 | Does the system automatically alert duplicate registrations? If so, how does this work? |  |  |
| 47 | Intelligent checking - capital letters, spell check |  |  |
| **D** | **Delegate Management** |  |  |
| 48 | Can badges be printed at home by delegates? |  |  |
| 49 | Can registered attendees upload their own files (e.g. presentations, submissions, etc.)? |  |  |
| 50 | Can you upload files for registrants to download (like maps, schedules, etc.)? |  |  |
| 51 | Can badges be customised? |  |  |
| 52 | Can invitation or marketing emails be sent out via the platform? |  |  |
| 53 | If so, can the registration form be pre-populated if someone wishes to register (e.g. name, organisation, email) |  |  |
| 54 | Can email reminders and updates be sent to attendees? |  |  |
| 55 | Can these be tailored depending on ticket type and/or what information was selected during registration? |  |  |
| 56 | Can you view/sort/search for registered attendees? |  |  |
| 57 | Can you cancel multiple tickets at once? |  |  |
| 58 | Can attendee information and responses be edited? |  |  |
| 59 | Can you download lists of registered attendees and their details? Details? |  |  |
| 60 | Can tickets be resent to registered attendees (if originals are lost)? |  |  |
| 61 | Can name badges be downloaded? |  |  |
| 62 | Exhibitor or Sponsor management? |  |  |
| 63 | Seating arrangements / assigned seating diagrams? |  |  |
| **E** | **At event features** |  |  |
| 64 | Can attendees register at the door or can tickets be sold on site? |  |  |
| 65 | Is there an organisers app/feature for checking in guests at the door? |  |  |
| 66 | Can multiple people be using the check-in app at the same time? |  |  |
| 67 | If so, do all the devices show total check-in rather than total of check-ins per device? |  |  |
| 68 | Does the check-in app update in real time? |  |  |
| 69 | Can you check in guests using code readers? |  |  |
| 70 | Can delegate replacements be managed within the app? |  |  |
| 71 | Is there a self-check-in option/feature? |  |  |
| 72 | Is there the ability to set up one-to-one meetings with other delegates? Details |  |  |
| 73 | Badge printing on-demand |  |  |
| 74 | Delegate app |  |  |
| **F** | **Website/online** |  |  |
| 75 | Can the registration form be embedded into another website? |  |  |
| 76 | Does the form integrate with social sharing platforms? Details? |  |  |
| 77 | Is the website/webpage mobile-responsive? |  |  |
| 78 | Is the website/webpage URL customisable? Details? |  |  |
| 79 | Can you use or purchase your own custom domain name? |  |  |
| 80 | Can the website/webpage be password protected? |  |  |
| 81 | Options to create different branded registration websites/webpages |  |  |
| 82 | Option to embed sign up forms within the website: www.ktn-uk.org |  |  |
| 83 | Addition of Google TAG analytics to back end of web pages |  |  |
| 84 | Video integration with YouTube and/or Vimeo? |  |  |
| **G** | **Analytics and data** |  |  |
| 85 | Ability to export data (to a .csv or similar) - please indicate if any fields are not exportable |  |  |
| 86 | Ability to create customised reports for export to support data analysis |  |  |
| 87 | Automated and customisable reporting to demonstrate ROI |  |  |
| 88 | Pre-event or post-event forms and surveys? |  |  |
| **H** | **IT, Security and technical features** |  |  |
| 89 | Integration with KTN's CRM system (Workbooks) through an open API (ideally REST or SOAP) |  |  |
| 90 | Is the platform GDPR compliant and how is this enforced? |  |  |
| 91 | Fully native Mac compatible? |  |  |
| 92 | What security standard do you adhere to ie ISO 27001, CyberEssentials Plus, PCI-DSS? |  |  |
| 93 | Does the platform support single sign on via Google and or two-factor authentication? |  |  |
| 94 | Can we have a copy or sight of your BC/DR policy? |  |  |
| 95 | What are the minimum system requirements for the service? |  |  |
| 96 | Where is the data held? |  |  |
| 97 | How is the data replicated and how often? |  |  |
| 98 | What is the backup policy and can we have a copy? |  |  |
| 99 | On which hosting platform is the data stored ie AWS, Azure? |  |  |
| 100 | Is each client set up with a segregated instance? |  |  |
| 101 | What is the SLA and can we have a copy? |  |  |
| 102 | How often are PEN tests run and by who? |  |  |
| 103 | How secure is our data when viewed and assisted by technical support? |  |  |
| 104 | Where is customer support based and is this 24/7? |  |  |
| 105 | How does the platform provide support? Email/Phone/remote desktop |  |  |