



# SOFTOOLS



## RISK-PLAN™

### RISKPLAN SAAS SOLUTION

Softools RiskPlan™ is the simplest enterprise-quality risk management app available today. Within minutes of signing up you can capture, prioritise, mitigate and report on risks (and opportunities) across your business or team, whether at the Project, Operational or Strategic level.

- The **RiskPlan** app can be configured with zero code where your process differs from the standard offering
- Use **RiskPlan** in any environment to standardise a best-practice approach to risk management, and provide the Executive team with the information they need to make critical business decisions.  
**Capture, mitigate, and eliminate future crises before they occur.**



- Migrate your current risk management spreadsheets in minutes.
- Registering new risks, adding mitigation plans, and creating professional PDF reports takes seconds.
- RiskPlan works seamlessly between phones and computers, as well as offline.
- No internet? No problem. RiskPlan uploads your changes when a connection returns. Remote site access at all times from your pocket.
- Get visibility of key risks and opportunities. Use the information at your fingertips to drive decisions and actions.
- Monte Carlo Simulation is available out of the box if required



The Softools platform integrates emerging AI Artificial Intelligence services that search the existing database of risks and auto-generates proven mitigation plans.

**“Imagine...** being able to create a culture of **continuous risk management** that captures, shares and embeds best practices based on emerging thinking and AI technologies**”**



## CHEVIOT TRUST SELF BUILT PENSION FUND RISKS AND CONTROLS APPLICATION

### CONTEXT

Cheviot is a Master Trust providing defined benefit/final salary and defined contribution/money purchase benefits which invests its profits to ensure the best outcomes possible for its members and employer partners. It combines over 90 years of experience and a long heritage of administration and governance with 21st century innovations. Cheviot Trust are a small organisation so did not want to be dependant on an IT service provider for this solution.

### CHALLENGE

Cheviot Trust are obligated to manage and report their risks and controls for their clients. They were using an in-house built MS Access to capture risks and monitor associated controls which held information but was complex to adapt and did not provide automated reporting and workflow capabilities needed to help Cheviot Trust scale their business efficiently.

### SOLUTION

Cheviot Trust enrolled two of their business analysts onto Softools ABC training course. They were able to create applications to capture their Strategic Plans and associated Risks and Controls and implement automation.

Cheviot Trust's citizen developers have since leveraged their Softools skills to digitize other back-office processes on Softools, such as Holiday tracking.



### OUTCOMES

- Modernisation of MS Access based Strategic Plan and Risk application bringing automation, efficiency and scalability to their solution. Softools platform enabled Cheviot Trust to digitize the processes rather than having to change their ways of working to adopt traditional packaged solutions.
- Softools skills in-house, capability to digitally enable the business quickly and without incurring IT services costs.



## Why Softools?

### Speed

Softools is the **fastest** and **simplest** digital platform to build and deploy custom business apps – *and without the need for IT involvement*

*"Subject Matter Experts and Managers can build apps on Softools without any coding knowledge"*

### Capability

Softools deliver simple and complex solutions (enterprise grade) in tight time-scales & budgets – secure, mobile, offline

### Value

A single user license provides unlimited access to off-the-shelf and custom-built apps



*"We have managed to build 3 brand new applications from the ground up and have been provided with excellent support at every stage".*

## SOFTOOLS DIGITAL PLATFORM

Softools is an advanced **no-code Digital Application Platform** running in the Cloud - enabling the Digital Transformation (DX) of core business processes. Softools hosted apps are immediately secure, can operate on any device, integrate with Enterprise Systems, and users can operate offline – *anywhere anytime, any place.*



## Digital Apps “by the business, for the business”

While many web app platforms offer advanced features, Softools is the only digital platform built for use by non-technical resources that enables all core features in one integrated platform.

### ONE INTEGRATED SOLUTION



#### EXECS & LEADERS Visibility & control

**EXEC DASHBOARD**  
Real-time reports & BI

**COMMERCIALS**  
All Apps = 1-Price

**SPEED**  
To implement

**AUTO REPORTS**  
Word/pdf Export

**BEST PRACTICE**  
Off-the-shelf apps



#### APP BUILDERS Fast & Easy to build

**ON-LINE LEARNING**

**EXCEL IMPORT**  
2-min app build

**INSTANT UI**  
& navigation

**1-CLICK**  
Deployment

**AB COMMUNITY**  
Professional network



#### OPERATORS Easy to learn & use

**GREAT UX**

**OFFLINE OPERATION**  
Anywhere, Anytime

**ANY DEVICE**  
Mobile to PC

**WORKFLOW**  
Automated Tasks

**ANY LANGUAGE**



#### CTO Secure & Scalable

**SECURITY**  
ISO 27.001

**SCALE**  
0-1,000+

**API & CSV**  
Data Integration

**AI ENABLEMENT**

**GOVERNANCE**  
Quality Control

**BUSINESS LEADERS** in all sectors & functions need visibility and control over their areas of operation, and the confidence that their teams are consistently adopting industry best practices.

This necessitates that processes have been mapped, optimized and digitized in 'apps', and that data in all critical areas is captured and presented real-time on reports and dashboards.

They also need to ensure that investment in software is optimized and aligned to the business strategy and tech roadmap.

**SOFTOOLS APP BUILDERS** don't need IT or coding skills - they are people who understand business processes. Our no code platform enables them to deliver solutions for the business FAST.

Complex functions including UI design, data-base linking and the technical deployment to a secure web hosting platform are all automated at the click of a button.

App Builders will also become part of a professional network drawn from all functions who are responsible for Digital Transformation in their businesses.

**USERS & OPERATORS** are constantly seeking tools that make their jobs easier and more compliant with internal and industry standards.

They want applications that reflect their ways of working and that are quick and easy to use on any device from PC and Tablet to Mobiles.

They also want as many tasks as possible to be automated using workflow so they can focus on value-added tasks.

International companies also need operators and supply chain to be able to work in any language.

**CTO & IT Teams** are increasingly excited by the potential of no-code platforms as they bring agility to the business without pulling on finite IT resources. IT leaders can provide vetted platforms to the business that comply with security, can scale and are interoperable.

This accelerates the rate that processes can be digitized by 25x, and has a dramatic impact on the challenge posed by Shadow IT.

Once a process has been digitized, data can be linked to enterprise data via APIs to create a more complete view of organization wide data.



## About Our Technology

### ACCESS

Access to the platform is via any modern browser (Edge, Chrome, Safari, & Firefox). The platform is mobile-optimised and so can be accessed on any device from PCs and tablets to Smartphones. The platform is based on 'progressive web' technology and can therefore be used offline.

### APPS COMPLEXITY

Applications can range from simple list-based stand-alone apps (e.g. Risk Register), to complex apps (e.g. Supply Chain Assessment) that are linked together, driven by workflow and synchronised to 3<sup>rd</sup> party systems via Softtools published APIs.

### APP BUILD

Certified App Builders learn in hours using the online ABC training program and use the integral AppStudio to design, configure and deploy apps using a systematic 8-step process in hours and with zero coding.

### BUSINESS CONTINUITY

The platform is used by many of the world's leading organisations and Governments, and so data is always held in a secure encrypted environment, controlled by clients and exported at any time.

### DATA INPUT

Data Import using CSV or API is used to complete a one-off migration during set-up. Data is then entered into the platform in 3 ways: 1) manual data input, 2) export / import via csv, and 3) real-time data synchronisation with 3<sup>rd</sup> party systems via WebHooks / APIs.

### DATA VALIDATION

Data field options and logic based on field type will automatically validate that data is consistent and complete. Specific fields can be set to be mandatory. Specific input forms can be visible or hidden using workflow based on user team or field values.

### INFRASTRUCTURE

The platform is deployed in a web hosted multi-tenant environment. Our hosting partner world-wide is MS Azure and so deployments are instantly secure, scalable and stable.

### INTEGRATION

The Softtools API is a JSON-based (JavaScript Object Notation) RESTful API with authentication via API Keys. Single Sign-On and MFA is also be Supported.

### LANGUAGES

The platform can be configured to run in multiple languages using pure translations or via the built in browser translate features. This allows users in different regions & countries to work on a common platform in their own language. It is also possible for App Builders to 'hard code' all system labels in local languages.

### PERFORMANCE

Speed of access is fast due to the offline capability that allows saving and pulling data from the browser cache. Saving to the server is determined by the bandwidth of local wireless & wired network connections or via 3G & 4G mobile networks.

### SCALE

The platform can scale from 1 app and user to 1,000s of apps and over 1,000,000 users for a single client.

### SECURITY

Access to the platform is on a named user basis which determines what a user can see (security) and what they can do (permissions). Single Sign-On (SSO) is available as an option. Softtools hold ISO 27001 and UK Cyber Essentials certifications.

### SUPPORT

Users gain first line support from on-screen help. Second line support is provided by internal client Administrators. Third line support is provided to certified Administrators via phone, email and WebEx against strict SLAs.

### TRAINING

Users, Administrators and App Builders are trained via webinars or in workshops using an 'action learning' approach:

**Level 1** – Basic User (2 hours)

**Level 2** – Super-Users / Administrators (+2 hours)

**Level 3** – Site Administrators (+2 hours)

**Level 4** – Basic App Builders (+ 1 day), and

**Level 5** – Advanced App Builders (+ 2 days)