



Response to

Hollard RFI 1725

Learning Management System | Learning Experience Platform

Prepared for

The Hollard Life Assurance Company Limited
The Hollard Insurance Company Limited

Submitted by

SynrgiseLearn (Pty) Ltd

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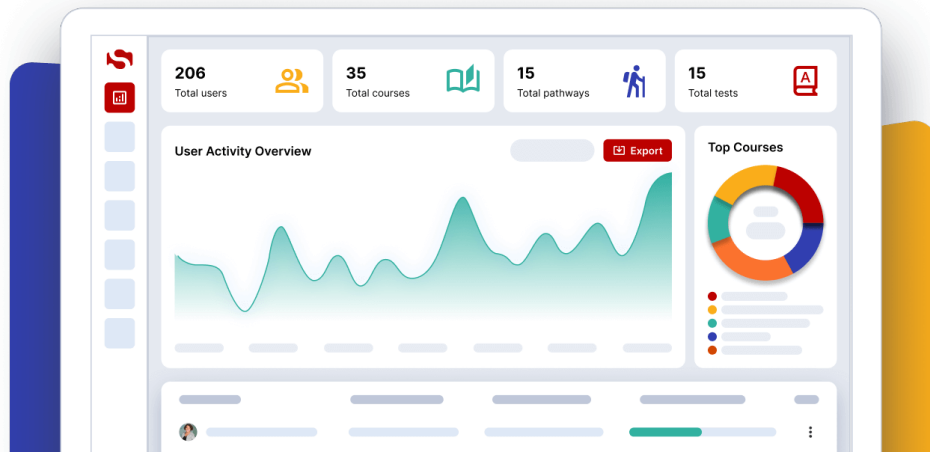
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Executive Summary

Hollard currently operates six active LMS platforms. This RFI is the first phase of a consolidation journey that will simplify administration, reduce cost, and bring learning onto a single, modern, scalable foundation. SynrgiseLearn is built for exactly this kind of consolidation, and we have structured our response and commercial model around it.



We are a South African edtech business with a pan-African footprint, SAQA-accredited, ISO 27001 certified, and operating a production LMS/LXP platform serving 45 active clients. Our platform combines a mature learning management core with an AI coaching layer called **SynrgiseSensei**, which is our material differentiator in this procurement. Where most LMS vendors have bolted AI onto a traditional content catalogue, we have designed an always-on development coach that sits over the LMS, the performance management system, the 360 assessment engine, and the talent management tooling. The LMS becomes content infrastructure. The assistant is where the actual work of developing people happens.

This response answers every item of the Annexure A requirements (IRS, FRS, NFRS, TRS, GRS, and Scenarios) and provides a simplified commercial model designed around Hollard's consolidation objective. We offer a flat-fee Enterprise subscription at **R100,000 per month** for unlimited access for 5,000 users, or a PAYG alternative for lower-volume months. Once-off implementation is scoped tightly around the specific work Hollard has identified: migration of approximately 50 SCORM-compliant compliance courses, historical completion data ingestion from Excel, SSO configuration, PaySpace integration, and platform branding.

We welcome the opportunity to demonstrate the platform in person, including a live walkthrough of SynrgiseSensei's daily briefing, coach conversation, practice simulation, team view, and generative authoring tools.

1. Company Information

1.1 Company Profile

SynrgiseLearn (Pty) Ltd is a South African learning technology company founded in 2008 and headquartered at 17 Thora Crescent, Wynberg, Johannesburg. The business was built to address the specific realities of delivering compliance, accredited, and developmental learning across the African continent, where infrastructure constraints, regulatory complexity, and cost sensitivity intersect.

As a proud member of the Jetline E.Com group, SynrgiseLearn has been enabled to scale its solution to over 1.8 million users by leveraging the institutional and operational support that Jetline provides.

This gives Hollard a delivery partner that combines the agility of a specialist edtech business with the financial stability, governance discipline, and operational resilience of an established South African group.

1.2 Ownership and Structure

SynrgiseLearn is a privately-owned South African entity. The company operates with a core engineering and product team, an in-house instructional design and eLearning development team, a digital team with Unity and WebGL capability, a customer success function, and a dedicated delivery team.

The business is a Level 2 B-BBEE compliant and SARS tax-compliant business. Compliance documents accompany this submission.

1.3 Years in Operation

18 years of continuous operation as at 2026, with the platform in active production use throughout. SynrgiseLearn has survived and grown through multiple market cycles and is financially self-sustaining, furthermore, supported by our Group company has allowed us to scale our solutions without the typical trade finance challenges smaller startups have had to contend with.

1.4 Core Competencies

The business brings four combined competencies that rarely appear in a single vendor.

Platform engineering: SynrgiseLearn operates its own LMS and LXP codebase, which means Hollard is not procuring a rebadged third-party platform. The product, architecture, and roadmap are owned by us, and roadmap enhancements, integrations, and customisations are delivered by the team that owns and maintains the source. This gives Hollard a partner with direct control over product direction, implementation quality, and long-term platform evolution.

Instructional design and content production: Our in-house instructional design and content production team creates engaging, interactive learning experiences across eLearning, virtual instructor-led training (VILT), and instructor-led training (ILT). We are able to convert existing learning material for effective online delivery or develop content from scratch in collaboration with client subject matter experts. This is the team that would support Hollard's legacy content remediation, modernisation, and rollout at scale.

AI and applied machine learning: SynrgiseSensei is our own product. The architecture, the coaching model, the practice simulation engine, and the generative authoring pipeline are built and operated by us.

Regulatory and accreditation experience: As a SAQA-accredited provider operating across multiple African jurisdictions, we understand the evidentiary requirements of regulators, the realities of CPD regimes, and the operational discipline required of a compliance-critical platform. We also bring deep experience in legacy South African unit standard-based training models, outcomes-based programme structures, and the transition toward QCTO-aligned occupational qualifications and skills programmes. This is especially important in environments where historical learning records, accreditation requirements, and modern platform delivery must work together seamlessly.

Off the shelf content mapping and provision: Through our sister company, Masterskill, we are able to support Hollard not only with platform delivery, but also with learning needs analysis, content mapping, sourcing, and provision across a broad range of subject areas. This includes disciplines such as IT, finance, compliance, soft skills, leadership, customer service, and business operations, among others. Where Hollard requires ready-to-deploy learning content, we can map available libraries to job roles, capability frameworks, compliance requirements, and development pathways, reducing time to rollout and avoiding unnecessary redevelopment. This gives Hollard access to both bespoke content development and scalable off-the-shelf provision through a single coordinated delivery ecosystem.

1.5 Capacity and Scalability

The platform scales horizontally across hosted environments and currently supports client deployments of over 10,000 users. There is no architectural limit on registered user count. Average page load time for dashboard and course content is 0.396 seconds. The platform supports 500 or more concurrent users without performance degradation, and peak-load scaling is handled through our hosting infrastructure partners.

1.6 South African Presence

SynrgiseLearn is a South African business with a locally based team and in-country hosting and support. This gives Hollard a delivery partner that understands the local regulatory, operational, and service environment, while ensuring accessible support during standard business hours. Our support desk operates Monday to Thursday 08:00 to 17:00 and Friday 08:00 to 15:00, excluding public holidays. Critical incidents carry a 1-hour first-response SLA, with major incidents escalated through our Crisis Management Team, which maintains a 15-minute primary-contact response.

1.7 Delivery Capacity

Project delivery is handled by a structured implementation team led by a dedicated project manager. Our standard implementation timeline for 5,000 users is 8 to 12 weeks. The Hollard scope, including the customisations identified in this response, is scoped at 16 to 20 weeks depending on parallel workstreams.

1.8 Reference Implementations

Three reference clients of comparable scope in financial services and insurance sector deployments are included in this submission. Direct contact details are released on shortlist.

These include:

Bidvest Life: 6,700+ users covering both internal staff and brokers, access to compliance training, product training and product certification. Integration with Broker platform.

Woolworths Financial Services: 1,500+ users for internal staff, access to compliance training, learning pathways, Udemy integration, product training and product certification. Integration Entra and Workforce management system

Spur Academy: 11,000+ users for all 9 brands. Compliance and Product training, scheduling, co-authored content, product information, management reporting dashboards

2. Solution Overview

2.1 High-Level Description

SynrgiseLearn is a SaaS-based Learning Management and Learning Experience Platform designed for organisations that need far more than a digital course repository. At its foundation, the platform delivers the full range of enterprise LMS capabilities: course delivery, compliance management, certification and recertification, assessment, classroom and virtual session scheduling, learning path management, reporting, role-based administration, and structured learner record management. On top of this mature LMS core, SynrgiseLearn adds a modern LXP layer focused on discovery, engagement, personalisation, and continuous development, creating a platform that supports both mandatory learning and long-term capability growth.

What differentiates SynrgiseLearn is that it is not built only to administer training, but to actively drive learning behaviour, learner momentum, and measurable development outcomes. The platform combines formal learning structures with social learning, curated journeys, manager visibility, CPD tracking, skills-oriented pathways, and configurable engagement mechanics that encourage participation and completion. This allows organisations to manage compliance-critical learning with rigour while also creating a more engaging and developmental learner experience for employees, managers, and distributed workforces.

A further point of distinction is SynrgiseSensei, our proprietary AI coaching and authoring layer, which sits across the platform rather than functioning as a disconnected feature. SynrgiseSensei supports learners through personalised guidance, daily prioritisation, nudges, recommendations, coaching conversations, and AI-driven practice simulations, while also supporting administrators and instructional designers with generative authoring, content transformation, and assessment creation. In practical terms, this means the platform does not simply host learning content; it helps shape development plans, surface the next best action, reinforce progress, and reduce the administrative effort required to create and maintain high-quality learning experiences at scale.

SynrgiseLearn is purpose-built for enterprise learning environments where compliance discipline, operational control, and learner experience must coexist. It is especially well suited to regulated, distributed, and multi-entity organisations that need strong governance, detailed reporting, integration capability, and the flexibility to support different audiences, brands, regions, and learning models within one ecosystem. The result is a platform that can serve as both the operational backbone of learning administration and the experience layer through which meaningful, measurable development happens.

2.2 Target Market

SynrgiseLearn serves two primary markets. On the corporate side, our core focus is medium-to-large organisations that require a robust, scalable learning platform to manage compliance, capability development, onboarding, certification, and workforce upskilling across complex operating environments. These clients often have distributed teams, multiple business units, varied learner audiences, and a need for both strong administrative control and an engaging learner experience.

On the academic and institutional side, we work with Skills Development Providers (SDPs), colleges, and universities that require structured delivery of accredited and non-accredited learning programmes, learner progress tracking, assessment management, certification, and reporting. In these environments, the platform supports both formal education requirements and the operational realities of modern digital learning delivery.

Across both markets, SynrgiseLearn is particularly well suited to organisations that need to balance learning governance, scalability, and reporting discipline with a modern, flexible, and user-friendly experience. Financial services, insurance, healthcare, retail, professional services, and education represent key segments of our client base.

2.3 Deployment Model

SaaS is our primary deployment model. The hosted environment runs on our dedicated space within the Xneelo Datacenter in South Africa as the primary site and Vultr Johannesburg site as the secondary site, with secure cloud storage for offsite backup.

Microsoft Azure availability is also offered for clients requiring Azure-specific residency, redundancy, or integration arrangements. On-premise and hybrid deployments are supported for clients with specific regulatory or procurement requirements.

2.4 Release Cadence and Roadmap

The platform receives ongoing enhancements delivered continuously, with major annual platform releases that bundle significant feature increments. Client-requested custom development is delivered on agreed project timelines. Broader features are rolled out to the full client base where they add value across the platform.

Planned roadmap through Q3 2026 includes:

Q2 2026. Expanded generative content authoring suite; predictive compliance risk scoring; WhatsApp and email nudge channels; enhanced skills intelligence module.

Q3 2026. Skills intelligence engine with automated learning path generation; team-level intervention workflows; VR scenario library with pre-built insurance industry templates; expanded mobile offline capability.

A detailed roadmap document is maintained and shared with clients during quarterly business reviews.

2.5 Mobile Experience and Offline Capability

Native iOS and Android apps are available. The platform is fully responsive for mobile browsers and includes tablet-optimised layouts. The mobile application for Hollard, included as a line item in this proposal, delivers biometric mobile SSO, configurable offline storage limits, auto-download on Wi-Fi, manual download control, background download, content auto-expiry, remote wipe, offline assessment delivery with timer enforcement and on-device encryption, offline file uploads, offline survey completion, auto-sync with conflict resolution, admin-configurable sync rules, data compression, and learner-visible sync status and queue management.

This mobile scope directly addresses the broker-consultant and distributed-workforce realities described in the Scenarios annexure.

2.6 Multi-Entity and Brand Support

The platform supports multi-branch and multi-brand configurations. Super administrators can configure sub-administrators with cherry-picked functions and audiences. Branding, colour palettes, logos, and domain-level configuration are supported per entity. This allows Hollard Life and Hollard Insurance to operate within a single platform instance while maintaining distinct experiences, or to be separated entirely where governance requires.

3. Solution Functionality

3.1 Learning Journeys

The platform supports the full range of learning delivery modalities. eLearning, classroom instructor-led training, virtual instructor-led training, blended programmes that combine pre-work, live sessions, and post-work, microlearning modules, and curated external content can all be sequenced into coherent learning journeys. Learning paths can be built with enforced prerequisites, manager approval gates, and conditional branching based on assessment scores.

3.2 Curriculum

Curriculum structures are built hierarchically and visually. Courses, modules, lessons, and activities can be organised into programmes, assigned to role cohorts or organisational units, and versioned over time. Content lifecycle management includes expiration policies, archival, and version rollback.

3.3 CPD Points and Certifications

CPD tracking is built into the platform. CPD points are assigned per course, module, or activity, with fractional points supported. Points are tracked per learner across all completed activities. Role-based CPD values, automated calculation from activity duration, real-time learner CPD dashboards, category-level CPD history, annual and biennial rollover, CPD caps, CPD compliance reporting for professional bodies, consolidated CPD portfolio export, and attendance register management are included in the Hollard implementation scope.

Certification management includes automated issuance upon completion or assessment pass, expiration dates, automated re-certification triggers, a centralised certificate registry for third-party verification, and automated certificate email delivery to learners and managers.

3.4 Assessments

The platform supports multiple question types including MCQ, true/false, matching, fill-in-blank, upload assignment and essay. Question pools support randomisation and shuffling. Scenario-based assessments, case studies, competency-based assessments, practical assessments with rubrics, and 360-degree peer assessments are supported. Time limits, attempt limits, and automated grading are configurable per assessment. Passing an assessment can trigger automatic certificate generation.

3.5 Gamification Rewards and Recognition

SynrgiseLearn includes a configurable gamification engine designed to increase learner motivation, strengthen completion behaviour, and make developmental progress visible at individual, team, and organisational level. Unlike superficial points-and-badges systems, our gamification model is tied to meaningful learning behaviours and business outcomes. Administrators can reward actions such as course completion, assessment performance, streak consistency, discussion participation, peer contribution, practice simulation participation, and achievement of development-plan milestones.

The engine supports points, badges, levels, leaderboards, milestone achievements, progression tracking, team challenges, and time-bound campaigns. Rules are configurable by audience, programme, business unit, or learning objective, allowing Hollard to apply different engagement models for compliance learning, sales enablement, onboarding, leadership development, or broker education.

3.6 Social and Peer Learning

Discussion forums, learning communities, comments, likes, shares, mentor matching, user-generated content workflows, and learning marketplace functionality are delivered on the platform. Social features can be scoped at role, department, or organisational level and are fully moderated.

3.7 Reporting and Analytics

Real-time administrator dashboards, custom report builders with drag-and-drop composition, scheduled report delivery, multi-format export (PDF, Excel, CSV), and learning analytics covering engagement, completion, and time-on-task are delivered as standard. Predictive analytics for at-risk learners, xAPI-based analytics dashboards, a data extraction API for external BI warehousing, and advanced data visualisation through Power BI integration are included in the Hollard implementation scope.

3.8 Manager Dashboards

Managers see progress and reports only for their direct reports through the My Teams view. Managers can drill into individual learner records, assign training to team members, and export compliance reports for audit purposes. Manager dashboards are configurable by role, and monthly group learning progress reports are automatically sent to designated recipients.

4. LMS | LXP Future (AI / VR / AR) Readiness

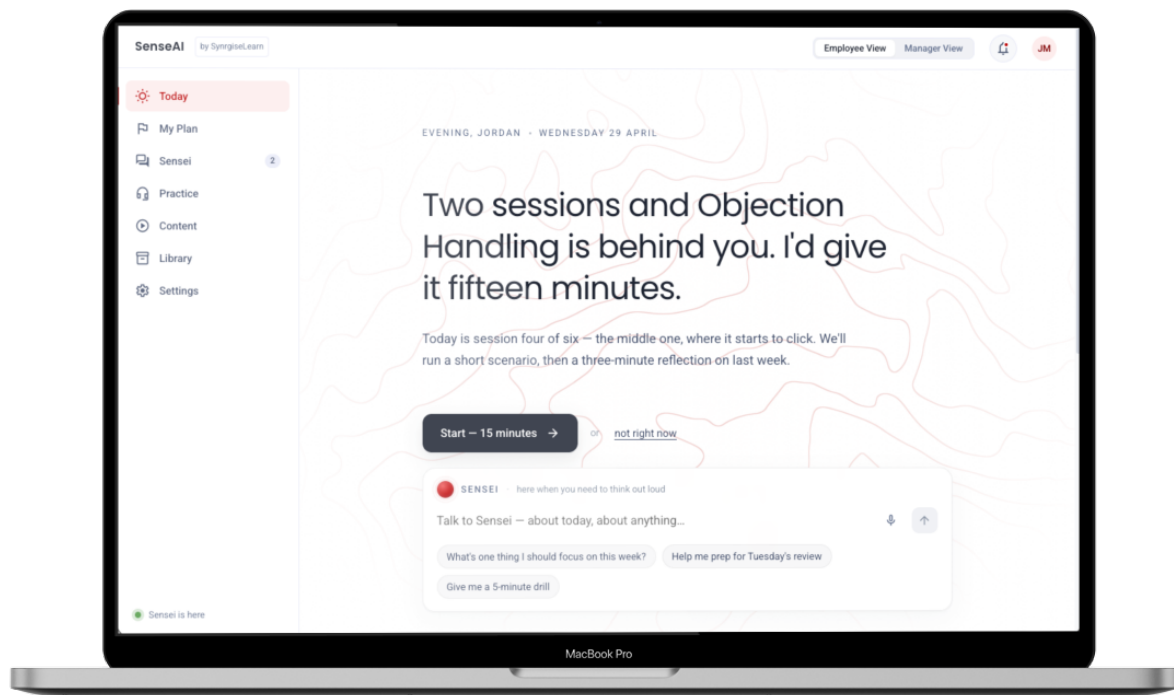
4.1 Our Approach to AI in Learning

Most LMS platforms treat AI as an add-on. A search bar that returns slightly better results, or a button that generates a quiz from a PDF. SynrgiseLearn takes a fundamentally different position.

AI is not a feature of the platform. AI is the platform.

At the centre of SynrgiseLearn sits **SynrgiseSensei**, an always-on development coach and talent operations layer that sits over the LMS, the performance management system, the 360 assessment engine, and the talent management tooling. The LMS becomes content infrastructure. The assistant is where the actual work of developing people happens.

For a Hollard employee, SynrgiseSensei behaves as a full-time personal coach that owns their development plan, delivers their learning, prepares them for reviews and assessments, and checks in on them daily. For a Hollard manager, it behaves as a chief-of-staff for people development. Surfacing team signal, proposing interventions, orchestrating training plans, and coaching the manager through the work of leading.



4.2 AI-Led Search and Recommendations

SynrgiseSensei operates as a contextual, plan-aware intelligence layer across the learner's entire development journey.

| Capability | Description |
|------------------------------------|---|
| Contextual Search | Natural language queries against the full content library including SCORM packages, documents, assessment materials, and internal knowledge bases. Learners ask questions and receive answers grounded in actual course material, not generic web results. The retrieval engine indexes everything the learner has access to and responds in context. |
| Plan-Driven Recommendations | Recommendations are not based on popularity or simple role matching. SynrgiseSensei analyses the learner's active development plan, compliance deadlines, performance review history, 360 assessment results, and stated goals to recommend the next best learning activity. Every recommendation ties back to a specific development objective. |
| Daily Briefing | When a learner opens the app, they do not see a course catalogue. They see a coach-voiced daily briefing: today's focus items drawn from their plan with time estimates, anything pending or time-sensitive, a signal from the coach (recognition, nudge, or reflection), and one peer or company signal. The single primary action is "start today's focus". |
| Proactive Outreach | The coach initiates contact. Learners do not have to remember to open the app. SynrgiseSensei reaches them through push notifications, WhatsApp, email, and in-app notifications. Delivery channel preferences and cadence are user-controlled. Morning briefings, mid-day nudges, recognition moments, accountability prompts, and weekly reflections are all coach-initiated. |
| Adaptive Personality | The coach has a consistent identity, warm and direct and competent, with user-adjustable dials for humour, frequency, and bossiness. A user at "low humour, low frequency, suggestive" and a user at the opposite extreme are talking to the same coach at different settings, not different coaches. |

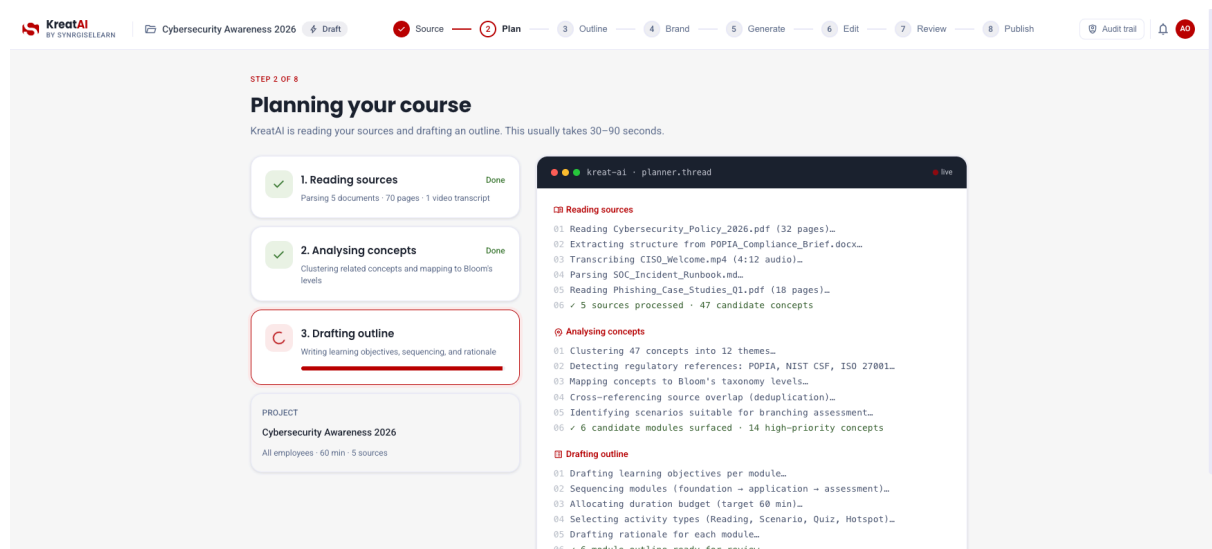
4.3 Generative AI Features

SynrgiseLearn provides generative AI capabilities across two domains. Content authoring tools for L&D administrators and instructional designers, and AI-driven coaching interactions that generate personalised learning experiences for each user.

Content Authoring and Assessment Generation

AI-assisted authoring tools generate course outlines, learning content drafts, supporting materials, quizzes, knowledge checks, scenario-based assessments, and brand-consistent imagery from source documents, policy texts, or subject matter expert input. All generated content enters a review and approval workflow before publication. Administrators specify question types, difficulty levels, Bloom's taxonomy alignment, and item counts. AI-powered tagging applies skills, competencies, topics, and regulatory categories automatically. All generative features are governed by role-based permissions with full audit trails of AI-assisted content creation.

This capability is directly relevant to Hollard's legacy content remediation. The tooling accelerates the process of rebuilding several hundred courses without sacrificing quality controls.



Coach-Driven Generative Intelligence

Beyond authoring tools, SynrgiseSensei generates personalised learning experiences dynamically for each user. These are not pre-built templates. They are produced by the AI coach in real time, grounded in the learner's plan, history, and context.

| Capability | Description |
|-------------------------------------|--|
| Practice Simulations | AI-driven voice and text simulations adapt to learner responses in real time. The coach owns the practice lifecycle end to end: it schedules practice sessions into the learner's week, selects scenarios based on identified skill gaps, runs the simulation playing the role of customer, manager, or counterpart, debriefs performance afterwards with specific scored moments, and folds observations back into the development plan. |
| Review & 360 Preparation | The coach has visibility into past review ratings, comments, and 360 results. It auto-synthesises patterns across cycles ("you've been rated strong on execution three cycles running, but communication has dipped this cycle"), helps the learner prepare practically for upcoming reviews, runs practice conversations simulating review scenarios, and suggests targeted development work tied to specific feedback. The coach does not write self-assessments or peer feedback for the user. It builds genuine capability, not performance theatre. |
| Development Plans | The coach drafts personalised development plans based on role requirements, past activity, 360 results, performance data, and stated goals. Plans balance self-directed and company-directed goals as parallel tracks. Each goal includes a rationale, a path through courses, practice sessions, coaching moments, and reflection prompts, and a progress view. Plans can be coach-proposed, user-initiated, or company-assigned. |
| Manager Interventions | When a manager identifies a team challenge ("my team isn't hitting sales targets"), the coach responds with a structured intervention plan. Group content assignments, practice campaigns, 1:1 coaching prompts, check-in cadence, and success signals. The manager edits and deploys from within a single conversation flow. The coach then tracks execution and reports back. |
| Top Performer Insights | When a learner is consistently excelling, the coach privately invites them to a short voice interview about what is working. The coach conducts the interview, summarises insights, and the performer reviews and decides whether to publish. Published insights appear in relevant peers' daily briefings as attributed, actionable tips. This creates a visible pathway from performance excellence to company-wide influence. |

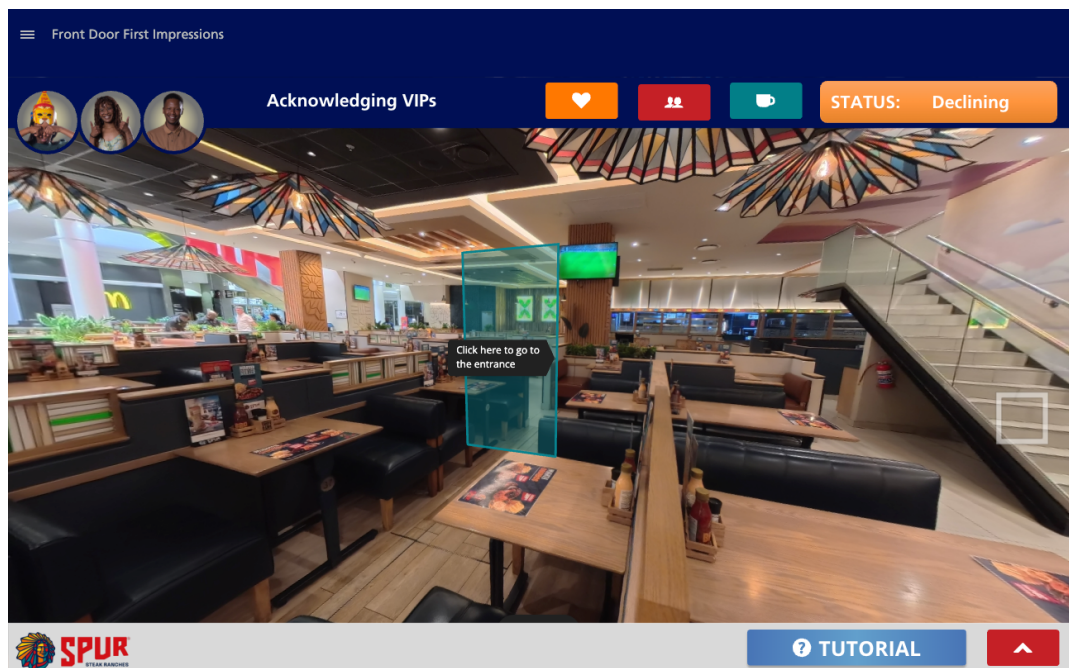
4.4 VR and AR Readiness

SynrgiseLearn is VR and AR-ready through a standards-based integration architecture and an in-house immersive content development capability.

Standards Support. The platform supports xAPI (Experience API) and CMI5 content packaging. VR and AR modules built to these specifications can be launched from within SynrgiseLearn, with completion, score, duration, and interaction data tracked and surfaced in standard reporting dashboards. We recommend CMI5 over bare xAPI for immersive content, as it provides a well-defined launch mechanism and session management layer that is essential for experiences running in external environments.

In-House Development. SynrgiseLearn's digital team has direct capability in Unity and WebGL for building bespoke VR and AR learning modules. Hollard would not need to engage a separate immersive content vendor. Modules can be designed to Hollard-specific scenarios (claims processing simulations, branch environment walkthroughs, compliance scenarios) and delivered as fully tracked learning objects within the platform. The coach treats VR/AR modules the same as any other content. It recommends them, schedules them, debriefs after completion, and folds performance data into the learner's plan.

WebXR Compatibility. WebXR-based content is supported through standard web delivery, allowing learners to access AR/VR experiences through compatible browsers and devices without requiring dedicated application installs. This aligns with Hollard's mobile-first requirement and reduces deployment friction.



4.5 AI Trust, Transparency, and Governance

An AI coach that mediates between employees, managers, and L&D requires a visible, enforceable trust model. SynrgiseSensei implements this structurally, not just in policy.

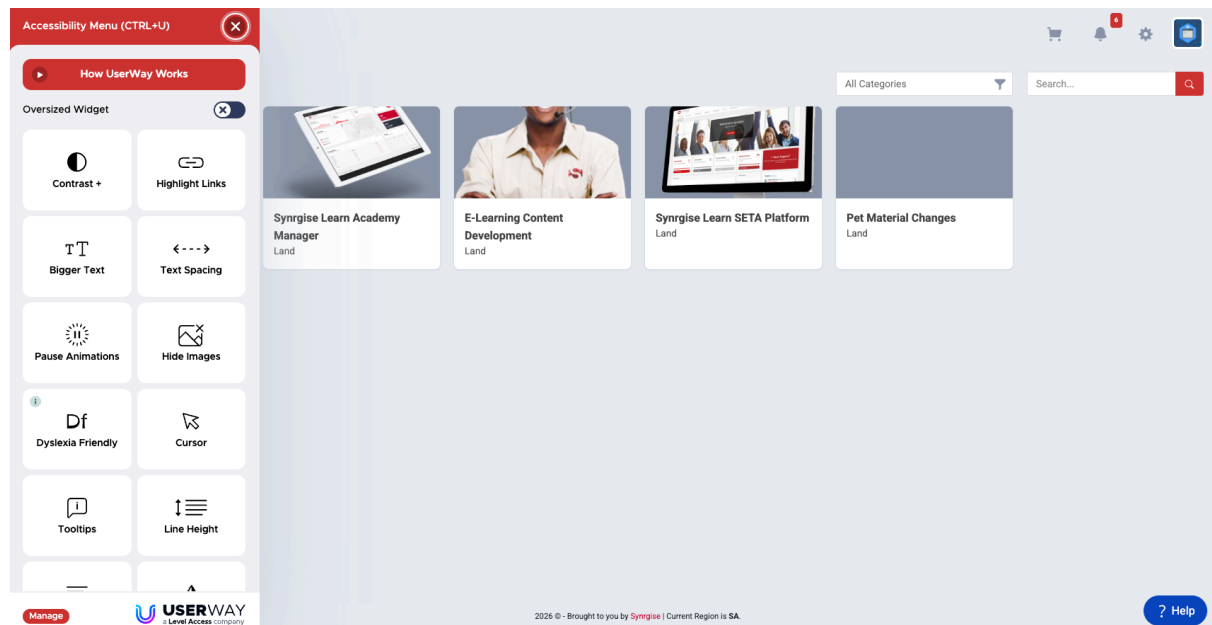
| Control | Detail |
|-------------------------------|---|
| Signal vs. Content | The coach reports behavioural signal to managers and L&D: engagement frequency, plan progress, completion rates, practice scores, sentiment trend. It never reports the content of private conversations with the employee. This line is visible to the employee at all times, in the daily briefing sidebar, in the coach conversation panel, and in settings. Not buried in a privacy policy. |
| Visible Memory | The coach remembers the person: patterns, preferences, past struggles, past wins. The employee can see a full summary of what the coach knows about them, can correct or delete any entry, and can export or reset their data at any time. |
| AI Transparency | Where AI is used, its purpose is clearly disclosed. Outputs are labelled as advisory or automated. Explainability notes accompany AI-driven recommendations where relevant. AI interactions and outputs are logged for audit. AI features can be disabled at tenant, role, or individual user level. |
| Data Usage | Hollard data will not be used for AI model training. This commitment is contractual and reinforced at the architecture level. The AI pipeline routes client data through purpose-scoped inference only. |
| AI Security | AI prompts and model access are protected against unauthorised access and manipulation. Prompt injection mitigations are implemented in the coaching and authoring pipelines. Accuracy and bias review processes are operated as part of the AI governance framework. |
| Audit & Compliance | All AI-generated content, plan modifications, coach interventions, and generative authoring outputs carry full audit trails. Role-based access controls govern which users can access which data surfaces. POPIA compliance and privacy-by-design principles are embedded at the architecture level. |

5. Accessibility and User Experience

The platform is fully responsive across desktop, tablet, and mobile browsers. Native apps are available for iOS and Android. Responsive design covers Chrome, Safari, Edge, and Firefox. Tablet-optimised layouts and screen orientation handling are supported.

Content accessibility is supported through standards-compliant HTML5 delivery, closed captioning on video content, and configurable font and contrast options. WCAG alignment is maintained at the platform level, and client-authored content is the responsibility of the author but can be assessed during our implementation quality assurance phase.

Additionally, SynrgiseLearn ships with Userway, the worlds leading Accessibility suite, allowing your content to be refactored and the solution interface to adjust so as to provide access to persons for a range of disabilities, including, sight, hearing and dyslexia.



6. Security and Compliance

6.1 POPIA and Privacy-by-Design

SynrgiseLearn is POPIA-compliant and operates a privacy-by-design architecture. Personal data is collected, processed, stored, and retained in accordance with the principles of the Act. Data subjects retain their rights to access, correction, objection, and deletion. Data processing agreements are executed with clients, and where cross-border data transfer is required, the platform supports controls that align with POPIA and GDPR expectations.

6.2 ISO 27001

SynrgiseLearn is ISO 27001 certified. Our Information Security Management System is operated in accordance with a formal policy framework that governs confidentiality, integrity, and availability of information assets across the organisation.

Governance and Accountability

Management is responsible for creating, approving, and reviewing the Information Security Policy. An Information Security Manager and Head of Information Compliance and Policy facilitate implementation, guidance, and review. Data owners remain accountable for the security of systems and information under their control. Managers ensure staff are trained and that access is granted only on a need-to-know and job-function basis. Employees are individually responsible for not causing breaches and for reporting any actual or suspected security incident. System managers are required to ensure only authorised users are given access and that systems remain secure and properly administered.

Acceptable Use and Conduct

Computer systems may be used for organisational business, research, administration, and limited personal correspondence, provided that use remains lawful, honest, and respectful. Email and internet use may be monitored. Sensitive information is not sent by ordinary email because email is considered insecure. Staff are required to protect logged-in terminals, verify callers requesting sensitive information, and hold conversations discreetly when discussing confidential matters.

Risk Management

Risk assessments are required for new information-processing systems, major changes to systems or processes, the introduction of new information assets, and where no review has taken place for three years. Risks are assessed using likelihood and impact and recorded in a formal risk register with an owner and review date. High risks are escalated to the Information Security Board while lower risks are reviewed by the Information Security Manager in collaboration with asset owners.

Access Management

Access to systems is formally authorised, based on job function, and restricted to registered users. Passwords must remain confidential, be sufficiently complex, and be changed regularly. Visitors and contractors are identified, recorded, supervised, and have temporary access removed when no longer needed. User access reviews are conducted quarterly, and where access lists are not reapproved in time, accounts are suspended.

Physical and Third-Party Security

Secure physical areas are maintained for servers, network equipment, and core computing facilities with restricted entry, access logs, and periodic review of who is permitted entry. External agencies may not access SynrgiseLearn networks unless formally authorised and covered by security and confidentiality agreements.

Encryption and Vulnerability Management

All data is encrypted at rest (AES-256) and in transit (TLS 1.2 or higher). Encryption keys are securely managed through our key management infrastructure with rotation policies and access controls. Continuous vulnerability scanning and patching are operated as part of the ISMS. Annual penetration testing is conducted by a suitably qualified security partner, with reports available to clients under NDA. Secure SDLC practices including SAST, DAST, and peer code reviews are enforced. Secrets are stored in a centralised vault with defined rotation policies.

Network and Incident Management

Network segmentation is implemented across production, staging, and development environments. DDoS protection is in place at the infrastructure layer. Staff report security incidents through defined channels. Incidents are recorded, analysed, classified by severity, and escalated as needed. Where a personal data breach creates risk to individuals' rights and freedoms, notification is made to the relevant supervisory authority within 72 hours and, where appropriate, to affected individuals.

6.3 Single Sign-On

SSO is supported via Microsoft Entra ID using SAML 2.0 and OpenID Connect. SCIM 2.0 provisioning for automated user lifecycle management is included as a scoped integration in this proposal, directly addressing Hollard's requirement for secure user synchronisation.

6.4 Role-Based Access Control

RBAC is the primary authorisation model. Default system roles are provided (Learner, Instructor, Administrator, Manager) and custom roles can be created without limit. Permissions can be controlled at feature level, content level, and data level, with hierarchical administrator structures (Super Admin, Regional Admin, Department Admin). Learners can hold multiple roles simultaneously. Role assignment can be automated from HR data.

6.5 Audit Logging

All access events, administrator actions, and data changes are logged. Log retention is configurable. Administrator actions and permission changes are audited. Tamper-evident compliance audit logging is included in the Hollard implementation scope to meet the specific requirements of regulatory auditors. Logs are exportable in standard formats and can be ingested into an enterprise SIEM.

6.6 Privileged Access Management

Privileged access is managed through controlled administrative procedures aligned with our ISO 27001 ISMS. For clients using CyberArk or equivalent enterprise PAM platforms, integration is delivered as a scoped line item.

7. Non-Functional Requirements

7.1 Performance

Average page load time is 0.396 seconds. The platform supports more than 10000+ concurrent users without performance degradation, with scaling handled horizontally through our hosting infrastructure.

7.2 Scalability

There is no architectural cap on registered users. Client deployments of over 250,000 users are in active production. Scaling during peak training cycles is achieved through the SaaS hosting model and is transparent to the client.

7.3 Availability

The platform targets 99.5% availability as a standard service level. Higher availability targets are available on negotiated contract terms.

7.4 Disaster Recovery

SynrgiseLearn operates a documented Disaster Recovery Plan covering the SynrgiseLearn SaaS platform, database systems, networking and connectivity infrastructure, and backup storage systems.

Recovery Objectives

| Metric | Target |
|--------------------------------|-------------------------------------|
| Recovery Time Objective (RTO) | 4 hours |
| Recovery Point Objective (RPO) | 24 hours |
| Application Services RTO | 4 hours (failover to Vultr DR site) |
| Database Systems RTO | 4 hours (automated synchronisation) |
| Networking RTO | 8 hours (redundant connectivity) |

Backup Architecture

| Backup Type | Retention |
|-----------------|-----------|
| Daily backups | 30 days |
| Weekly backups | 52 weeks |
| Monthly backups | 12 months |

Primary backup location is the Xneelo Datacenter. Secondary backup location is Vultr Johannesburg. Offsite backups are held in secure cloud storage. Automated scripts verify backup integrity. Recovery tests are conducted quarterly. Immutable backup controls protect against tampering. For clients hosted on Microsoft Azure, full failover and multi-region deployments are configured and managed to the same RTO and RPO targets as our primary Xneelo infrastructure, giving Hollard flexibility on hosting choice without compromising recovery discipline.

Failover

Automated and manual failover capabilities are in place. Primary recovery site is the Xneelo Datacenter in South Africa. Backup recovery site is the SynrgiseLearn Johannesburg offices. Failover processes are validated during quarterly recovery tests.

Disaster Scenarios Covered

Natural disasters (earthquakes, floods, fires) mitigated through geographical redundancy and tested emergency response plans. Cyber attacks mitigated through regular penetration testing, endpoint protection, firewall configurations, and incident response planning. System failures mitigated through regular health checks, proactive monitoring, and rapid failover mechanisms. Data corruption mitigated through strict access controls, version-controlled backups, and continuous data validation. Human errors mitigated through staff training, access restrictions, and operational documentation.

7.5 Business Continuity

A Business Continuity Plan operates alongside the Disaster Recovery Plan, focused on maintaining essential business processes through a structured Crisis Management Team.

Crisis Management Team

An IT Recovery Team (IT Manager, Database Analyst, Server Technician) and a Business Recovery Team (Business Manager, HR Lead, Finance Lead) are activated on incident. Primary contact response is within 15 minutes. Communication methods include Slack, email, and SMS alerts. CMT members undergo quarterly business continuity training.

Response Plans

| Impacted Area | Recovery Time |
|--|---------------|
| Office unavailability (remote work activation) | 1 hour |
| Data centre (switch to secondary site) | 2 hours |
| Email servers (backup system activation) | 1 hour |
| CRM system (cloud backup switch) | 3 hours |
| File storage (offsite restore) | 4 hours |
| Communications (alternative solutions) | Immediate |

Business Continuity Procedures

Specific procedures are documented for fire or physical disaster (evacuation, headcount, backup site activation, data retrieval), cybersecurity breach (containment, forensic analysis, credential reset, enhanced monitoring, security audit), and natural disasters (monitoring, relocation, safety protocols, stakeholder communication).

Review and Maintenance

Annual full-scale reviews validate the BCP against evolving business operations and threats. Bi-annual scenario drills simulate cyber incidents, natural disasters, and operational failures. Monthly automated audits monitor backup integrity, failover capabilities, and system performance. Post-incident analysis is conducted after every incident, with findings documented and BCP updates applied.

7.6 Accessibility

SynrgiseLearn SynrgiseLearn ships with UserWay, the world's leading accessibility suite, allowing platform content to be refactored and the interface to adapt so as to provide access to people across a range of disabilities, including sight, hearing, and dyslexia.

7.7 Extensible platform architecture

SynrgiseLearn SynrgiseLearn is designed as an extensible platform rather than a fixed-function LMS. While the learning management and learning experience capabilities form the core of the solution, the broader SynrgiseLearn platform has already been successfully extended into adjacent people-development and talent processes, including performance management, 360-degree assessments, skills questionnaires, personal development plans (PDPs), and wellness surveys.

This modular approach allows clients to begin with a focused LMS/LXP implementation and expand over time into a broader capability, performance, and employee development ecosystem without needing to replace the underlying platform. Existing modules can be deployed where requirements align with proven SynrgiseLearn functionality, and bespoke extensions can be designed and delivered where client-specific workflows, reporting requirements, or user experiences are needed.

For clients such as Hollard, this means the platform can evolve beyond learning administration into a more connected environment for development planning, assessment, manager-led intervention, and employee support. It also means future requirements can be addressed within a common architecture, data model, and user experience, reducing fragmentation and avoiding the cost and complexity of introducing separate point solutions over time.

8. Implementation Approach and Timelines

8.1 Methodology

Implementation follows a structured five-phase methodology.

| Phase | Activities | Duration |
|--|--|-----------|
| 1. Discovery and scoping | Requirements confirmed, data sources mapped, integration points defined, customisation backlog prioritised | 2 weeks |
| 2. Configuration and branding | Platform provisioned, organisational hierarchy modelled, branding applied, base roles configured | 2–3 weeks |
| 3. Integration and custom development | SSO, HRIS, collaboration, and scoped custom development delivered and tested | 4–6 weeks |
| 4. Content migration and QA | Legacy content migrated, user data imported, end-to-end testing | 2–3 weeks |
| 5. Go-live and onboarding | Administrator training, learner communication, early-life support | 2 weeks |

8.2 Estimated Timeframes

Based on Hollard's clarifications that the current content base is SCORM-compliant and historical data will be supplied in Excel format, the Hollard implementation is scoped at 10 to 12 weeks from contract signature to go-live. This is a realistic target that accounts for the multi-platform consolidation context, Hollard-side UAT cycles, and coordination across the six source platforms being decommissioned. weeks.

8.3 Accelerated Path to Go-Live

An accelerated path is available by running workstreams in parallel and deferring non-critical enhancements to a post-launch release. This can compress the core go-live to 8 weeks for a priority cohort, with subsequent migration waves bringing remaining content and learner populations onto the platform incrementally.

8.4 Deployment and Onboarding Support

Administrator Administrator training is included at five sessions of four administrators per session. Self-paced administrator eLearning is also provided, which allows further administrator training beyond the initial sessions without additional cost. End-user training materials include videos and an eLearning course.

Hollard has indicated that change management services are not required, and that post-implementation support sits outside the scope of this RFI. Our proposal is structured accordingly: the implementation and pricing focus on platform delivery, configuration, content migration, and initial training only.

9. Data Migration and History

9.1 Legacy Compliance Courses

Hollard has confirmed that the approximately 50 compliance courses currently in scope are SCORM-compliant and hosted across multiple platforms. For SCORM packages, migration is a straightforward technical exercise: the content is exported from the source platforms, imported into SynrgiseLearn, validated for launch behaviour and tracking, and made available to the relevant audiences. No remediation or re-authoring is required as part of the initial migration.

Where Hollard chooses to modernise or consolidate specific compliance courses later, our AI authoring tooling and in-house instructional design team are available on a scoped basis. This is deliberately kept outside the initial implementation scope to preserve the speed, simplicity, and cost profile of the core migration.

9.2 Historical Learner Completion Data

Hollard has confirmed that historical learner completion data will be supplied in Excel format. This data is imported through our structured data migration tooling, preserving the original completion date, score, and certification evidence where available. All imported records are flagged as legacy-migrated for audit clarity and are visible on each learner's profile and transcript.

10. Support and Maintenance

Hollard has indicated that post-implementation support sits outside the scope of this RFI. This section describes the support model available should Hollard elect to engage SynrgiseLearn for ongoing support in a future phase.

10.1 Support Tiers

Support is delivered through a tiered model. Tier 1 handles standard platform queries and known-issue resolution. Tier 2 handles configuration and non-trivial technical issues. Tier 3 handles engineering escalations and custom development queries.

10.2 Service Level Agreements

| Severity | First Response |
|---|----------------|
| Critical (platform unavailable or significant user impact) | 1 hour |
| High (specific functionality or subset of users affected) | 4 hours |
| Medium | 8 hours |
| Low | 24 hours |

Resolution targets are agreed per incident class and would be covered in any subsequent support agreement.

10.3 Escalation

Issues that cannot be resolved within first-response windows, or that require engineering input, are escalated through a defined ticket path with the designated Account Manager having oversight of all escalations. Critical incidents activate the Crisis Management Team with 15-minute primary contact response.

10.4 South African-Based Support

All primary support is delivered from South Africa, operating Monday to Thursday 08:00 to 17:00 and Friday 08:00 to 15:00, excluding South African public holidays. 24x7 security event monitoring is operated separately to the helpdesk support function.

10.5 Post-Deployment Support Model

A dedicated Customer Success Manager is assigned post-go-live. The CSM holds regular review sessions, manages platform health reporting, identifies optimisation opportunities, and acts as the commercial and delivery point of contact for ongoing work.

10.6 Scalability Considerations

The support function scales with the client base. For Hollard, we assign a named CSM, a dedicated technical account lead, and a delivery coordinator for the initial post-launch period to ensure stability and responsiveness during the ramp phase.

10.7 Platform Health Included in Subscription

Regardless of the chosen support arrangement, the platform subscription always includes platform maintenance, updates, version upgrades, hosting, SaaS infrastructure, security patching, backup operation, and disaster recovery. These are not optional add-ons and are not withdrawn if Hollard chooses to source end-user support elsewhere.

11. Integrations

11.1 HRIS

A pre-built PaySpace integration is available for user and organisational data synchronisation. Other HRIS integrations (Sage, Oracle HCM, SAP SuccessFactors) are delivered as custom integrations based on scope. SCIM 2.0 provisioning for automated user lifecycle management across HR systems is included in the Hollard implementation scope.

11.2 Microsoft Entra ID Integration

Beyond SSO authentication, SynrgiseLearn integrates with Microsoft Entra ID as a source of user and organisational data. The integration synchronises user accounts, reporting lines, permission groups, department and team membership, and organisational hierarchy directly from Entra into the platform. This allows Hollard to maintain a single source of truth for workforce structure in Entra, with role-based permissions, manager-subordinate relationships, and organisational groupings automatically reflected in SynrgiseLearn.

Synchronisation is bidirectional where needed and runs on a configurable schedule, ensuring that changes to Hollard's organisational structure, joiners, movers, and leavers flow through to the platform without manual administrative effort. Combined with SSO and SCIM 2.0 provisioning, this closes the loop on identity and user lifecycle management across the Hollard environment.

11.3 Custom Integrations

Custom integrations are delivered by our engineering team on a scoped-project basis. REST APIs with OAuth 2.0 / OIDC authentication are provided across all major platform functions. Rate limiting and full traceability are enforced. Comprehensive API documentation is maintained, with a versioning strategy.

11.4 Collaboration

Microsoft Teams, Outlook calendar invitations, Big Blue Button, Zoom, and Adobe Connect are natively supported for virtual instructor-led training. Additional collaboration integrations can be custom built.

11.5 xAPI, SCORM, and CMI5

SCORM 1.2 and SCORM 2004 (3rd/4th Edition) are fully supported. xAPI is fully supported through an integrated Learning Record Store included as a line item in this proposal. CMI5 content playback is supported through a scoped service included in the implementation.

11.6 Content Libraries and External Providers

LTI compliance allows the platform to deploy and track content from third-party LTI-compliant providers, including major external content libraries. We also have direct integrations into Udemy for Business, BizLibrary, Percipio and Support AICC wrapped courses from a host of others.

11.7 Enterprise BI and Reporting

Data export to Power BI and similar enterprise BI tools is available through the integrated data extraction API included in the Hollard implementation scope. Custom data visualisations are delivered through the BI integration and the platform's custom reporting tools.

11.8 Other Integrations

Custom integrations with domain-specific systems (broker management, policy administration, customer master systems) are scoped and built on a project basis.

12. Costing Information (Indicative)

All pricing is quoted in South African Rand and excludes VAT. Pricing is indicative and will be confirmed on formal RFP engagement following scoping refinement.

| Component | Cost | Component |
|--|--|--|
| Once-off implementation | R246,000 – R305,000 | Once-off implementation |
| Enterprise subscription | R100,000 per month | Enterprise subscription |
| PAYG alternative | R50,000 per month base (up to 1,250 active learners), plus R30 per additional active learner | PAYG alternative |
| AI authoring credits (optional) | From R3,000 per month | AI authoring credits (optional) |
| Ad hoc professional services | R450 – R900 per hour | Ad hoc professional services |

This covers a complete platform consolidation from Hollard's six current LMS platforms onto SynrgiseLearn, including all implementation work, hosting, support, maintenance, version upgrades, disaster recovery, and access to our 190-title eLearning library.

12.1 Once-Off Costs

| Item | Description | Indicative Cost |
|-----------------------------|--|----------------------------|
| Platform Implementation | Discovery, configuration, branding, user hierarchy setup, role and permission configuration, UAT, go-live support | R180,000 – R220,000 |
| Content Migration | Migration of approximately 50 SCORM-compliant compliance courses: import, validation, deployment | R16,000 – R20,000 |
| PaySpace Integration | Pre-built HRIS integration for user and org data sync (dependent on Hollard master data structure, which will be confirmed during discovery) | R20,000 |
| SSO Configuration | Microsoft Entra ID SAML/OIDC integration | Included in Implementation |
| Historical Data Migration | Import of historical learner completion records from Hollard-supplied Excel format | R30,000 – R45,000 |
| Administrator Training | Five administrator training sessions (four administrators per session) plus self-paced admin eLearning | Included in Implementation |
| End-User Training Materials | Learner-facing orientation videos and an eLearning course | Included in Implementation |

12.2 Recurring Costs

We offer two commercial options for the ongoing platform subscription. Option 1 is the recommended approach for Hollard given the consolidation objective and the 5,000 full-time and 5,000 occasional learner populations.

Option 1: Enterprise Subscription (Recommended)

Option 1 offers predictable monthly cost, unlimited usage across Hollard's full learner base, and no surprises from overage billing. This is the right option for an organisation consolidating from six platforms into one, because it removes the friction of measuring and reconciling active usage during a migration period when patterns are shifting.

| Item | Terms |
|-------------|---|
| Coverage | Unlimited access for up to 5,000 named full-time users, with occasional and once-off learners accommodated without additional per-user charges |
| Monthly fee | R100,000 per month |
| Inclusions | Platform licence, hosting, maintenance, updates, version upgrades, SaaS infrastructure, security patching, backup and DR operation, access to our off-the-shelf eLearning library (190 titles), SynrgiseSensei AI authoring and coaching capabilities |

Option 2: PAYG Subscription (Occasional Learner Pricing)

Option 2 suits lower-volume phases (for example, an initial cohort of 1,000 learners on the platform while remaining populations are onboarded from the legacy platforms). As active user counts grow towards 5,000, monthly cost under Option 2 rises above Option 1, which is the reason we recommend Option 1 for a full-population deployment.

| Item | Terms |
|-------------------|--|
| Base subscription | R50,000 per month — covers hosting, maintenance, support, and platform access for up to 1,250 active learners in the month |
| Overage rate | R30 per additional active learner per month beyond 1,250 |
| Annual minimum | R600,000 |

Support, Maintenance, Hosting, and Infrastructure

Included in the base subscription. This covers platform maintenance, updates, version upgrades, hosting, SaaS infrastructure, security patching, backup and DR operation, support desk access, and ongoing enhancements delivered under our annual platform release cycle. The platform runs on Xneelo (primary) and Vultr (secondary) with secure cloud backup storage, and Azure availability where required.

AI Authoring Credits (Ongoing)

AI authoring is priced on a usage-based credit model, ensuring Hollard pays for content created rather than absorbing a flat fee regardless of usage. One credit equals one generated slide (including copy, imagery, and narration). Interactive activities and assessment items consume 0.5 credits each. Course planning, outlining, and editing refinements are included at no additional credit cost.

| Tier | Monthly Credits | Per-Credit Rate | Monthly Cost |
|----------------|-----------------|-----------------|--------------|
| Starter | 100 | R30 | R3,000 |
| Growth | 400 | R22 | R8,800 |
| Scale | 1,000 | R15 | R15,000 |

Credits roll month to month within the contract year. A monthly soft cap of 40% of the annual block applies to ensure sustainable usage patterning. Consistent overage beyond the soft cap for three consecutive months triggers a tier review conversation. Overage credits are billed monthly in arrears at 1.5x the current tier rate.

Post-migration, we would expect Hollard to operate at the Growth tier for ongoing compliance content updates and new programme development, with the ability to burst to Scale during content-intensive periods.

12.3 Professional Services Hourly Rates

| Role | Rate |
|--------------------------------|---------------|
| Software Developers | R650 per hour |
| Instructional Designers | R900 per hour |
| eLearning Developers | R450 per hour |

All hourly rates are applicable to any ad hoc scoped services outside of the standard implementation and support agreements.

12.4 Contract Terms

Annual and multi-year agreements are available. Standard cancellation is 90 days. Multi-year agreements carry a discount on the per-user rate in exchange for term commitment.

12.5 What is Included in the Base Licence

Platform access, hosting, maintenance, support, version upgrades, platform enhancements, and access to our off-the-shelf eLearning library of 190 titles are all included in the base subscription. AI authoring credits, custom development, and specific integrations are itemised above.

13. Supporting Documents

The following compliance and supporting documents accompany this submission.

- ISO 27001 certificate
- B-BBEE certificate
- SARS tax clearance certificate
- Company registration documents
- Bank account confirmation letter

Additional platform feature documentation is available at www.synrgise.com.

14. Closing

Hollard has structured a thorough and thoughtful RFI. The brief signals an organisation that understands the difference between a learning platform that meets a checklist and a learning environment that actually changes how people grow in their work.

SynrgiseLearn is built for the latter. The combination of a mature LMS core, a production AI coaching layer, an in-house content production team, a disciplined approach to compliance and security, and a South African delivery capability gives Hollard a partner that can both meet the immediate brief and grow alongside a long-term digital learning strategy.

We welcome the opportunity to demonstrate the platform in person. The demonstration would cover SynrgiseSensei's daily briefing and coach conversation surfaces, a live practice simulation, the team view and manager intervention flow, the generative authoring pipeline operating on a sample Hollard policy document, and the compliance and reporting surfaces that underpin the learning operation.

Thank you for the opportunity to respond.

SynrgiseLearn (Pty) Ltd

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