



Response to

Hollard RFI 1725

Technical Proposal

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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Contents

Executive Summary	4
1. Solution Overview	5
1.1 High-Level Description.....	5
1.2 Target Market.....	6
1.3 Deployment Model.....	6
1.4 Release Cadence and Roadmap	6
1.5 Mobile Experience and Offline Capability	7
1.6 Multi-Entity and Brand Support	7
2. Solution Functionality.....	8
2.1 Learning Journeys.....	8
2.2 Curriculum	8
2.3 CPD Points and Certifications	8
2.4 Assessments	8
2.5 Gamification, Rewards, and Recognition	9
2.6 Social and Peer Learning	9
2.7 Reporting and Analytics.....	9
2.8 Manager Dashboards	9
3. LMS LXP Future (AI / VR / AR) Readiness.....	10
3.1 Our Approach to AI in Learning	10
3.2 AI-Led Search and Recommendations.....	11
3.3 Generative AI Features.....	12
3.4 VR and AR Readiness	14
3.5 AI Trust, Transparency, and Governance	15
4. Accessibility and User Experience	16
5. Security and Compliance	17
5.1 POPIA and Privacy-by-Design	17
5.2 ISO 27001	17
5.3 Single Sign-On.....	19
5.4 Role-Based Access Control	19
5.5 Audit Logging	19
5.6 Privileged Access Management.....	19

6. Non-Functional Requirements	20
6.1 Performance	20
6.2 Scalability	20
6.3 Availability	20
6.4 Disaster Recovery	20
6.5 Business Continuity	22
6.6 Accessibility	23
6.7 Extensible Platform Architecture	23
7. Implementation Methodology	24
7.1 Phase Structure	24
7.2 Estimated Timeframes	24
7.3 Accelerated Path to Go-Live	24
7.4 Deployment and Onboarding Support	25
8. Data Migration and History	25
8.1 Legacy Compliance Courses	25
8.2 Historical Learner Completion Data	25
9. Integrations	26
9.1 HRIS	26
9.2 Microsoft Entra ID Integration	26
9.3 Custom Integrations	26
9.4 Collaboration	26
9.5 xAPI, SCORM, and CMIS	27
9.6 Content Libraries and External Providers	27
9.7 Enterprise BI and Reporting	27
9.8 Other Integrations	27
10. Closing	27

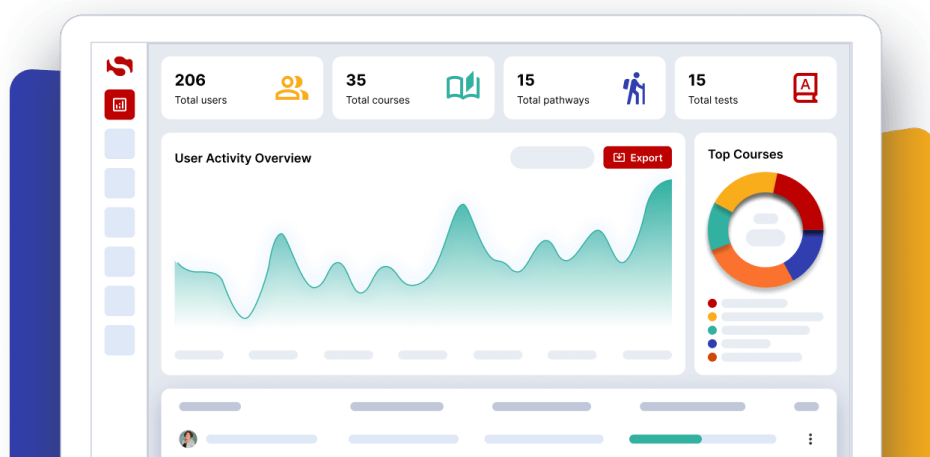
Executive Summary

Hollard is consolidating from six LMS platforms onto a single foundation. The technical brief signals a need for a platform that can absorb that diversity without compromise: scalable delivery to a distributed workforce, structured remediation of legacy content, modern AI capability, robust integration with Microsoft Entra ID and PaySpace, and the security and compliance discipline required of a regulated insurer.

This Technical Proposal addresses the platform's functionality, AI and immersive readiness, security and compliance posture, non-functional architecture, integration model, and data migration approach. A separate Commercial Proposal accompanies this document and addresses pricing, contract terms, and service level agreements.

SynrgiseLearn combines a mature LMS core with a modern LXP layer and an AI coaching system, **SynrgiseSensei**, that we have built in-house. The platform supports more than 1.8 million users across our client base, with single-instance deployments running over 250,000 users in production. It is ISO 27001 certified, POPIA compliant, and operates a documented Disaster Recovery Plan with a 4-hour RTO and 24-hour RPO.

This response answers every item of the Annexure A requirements (IRS, FRS, NFRS, TRS, GRS, and Scenarios). Where a requirement sits outside out-of-the-box configuration, it is delivered through implementation services or a defined integration. Comments in the annexure indicate where post-installation setup applies.



1. Solution Overview

1.1 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.

1.2 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.

1.3 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 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.

1.4 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.

1.5 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 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 capability directly addresses the broker-consultant and distributed-workforce realities described in the Scenarios annexure.

1.6 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. For a consolidation project replacing six existing platforms, this multi-entity capability lets Hollard bring distinct audiences and brands onto a single system without losing their individual identity or administrative boundaries.

2. Solution Functionality

2.1 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.

2.2 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.

2.3 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 configured during implementation.

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.

2.4 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.

2.5 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.

2.6 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.

2.7 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 configured during implementation.

2.8 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.

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

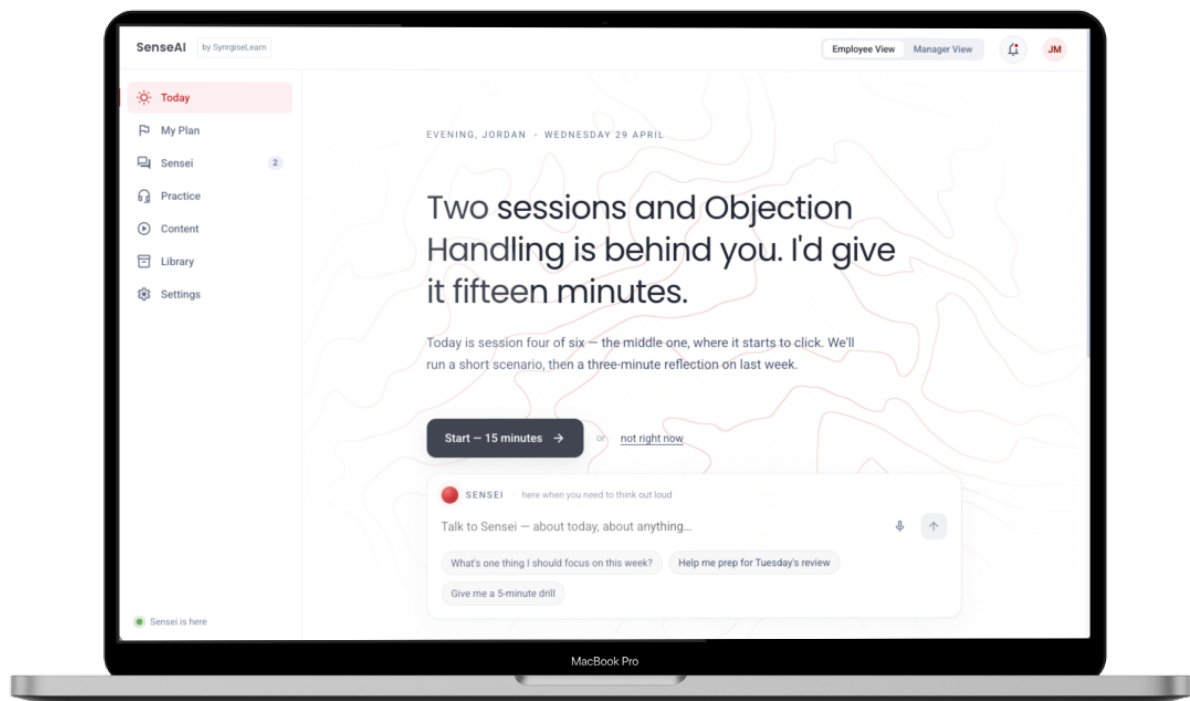
3.1 Our Approach to AI in Learning

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.



3.2 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.

3.3 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.

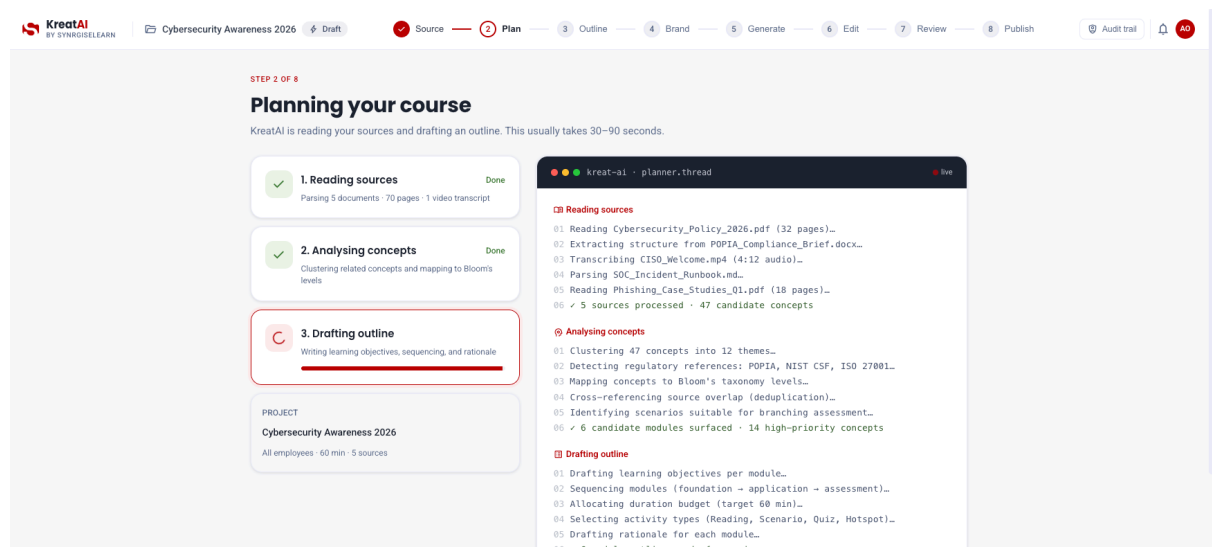
Content Authoring and Assessment Generation

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 Map

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.

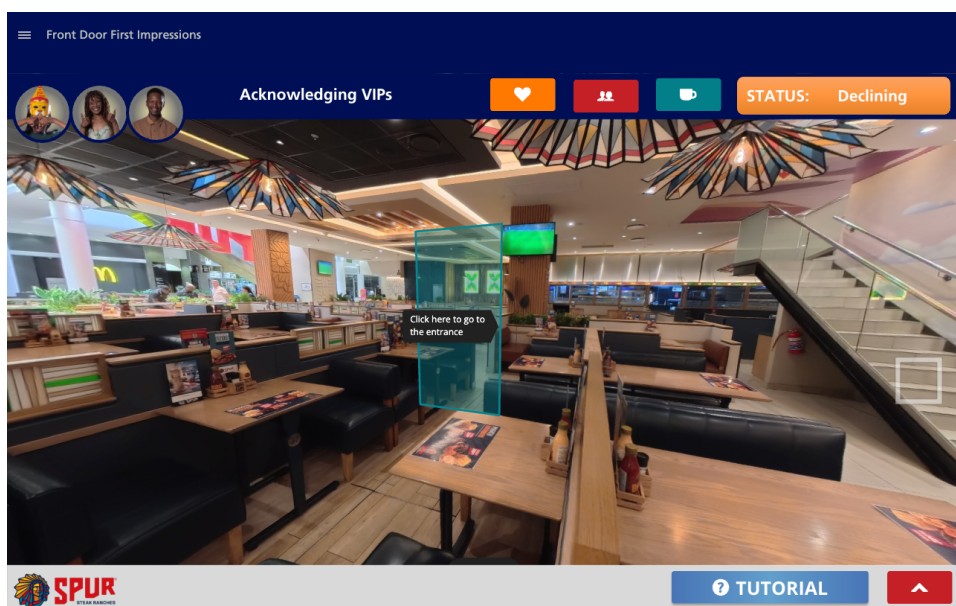
3.4 VR and AR Readiness

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 such as claims processing simulations, branch environment walkthroughs, or 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.



3.5 AI Trust, Transparency, and Governance

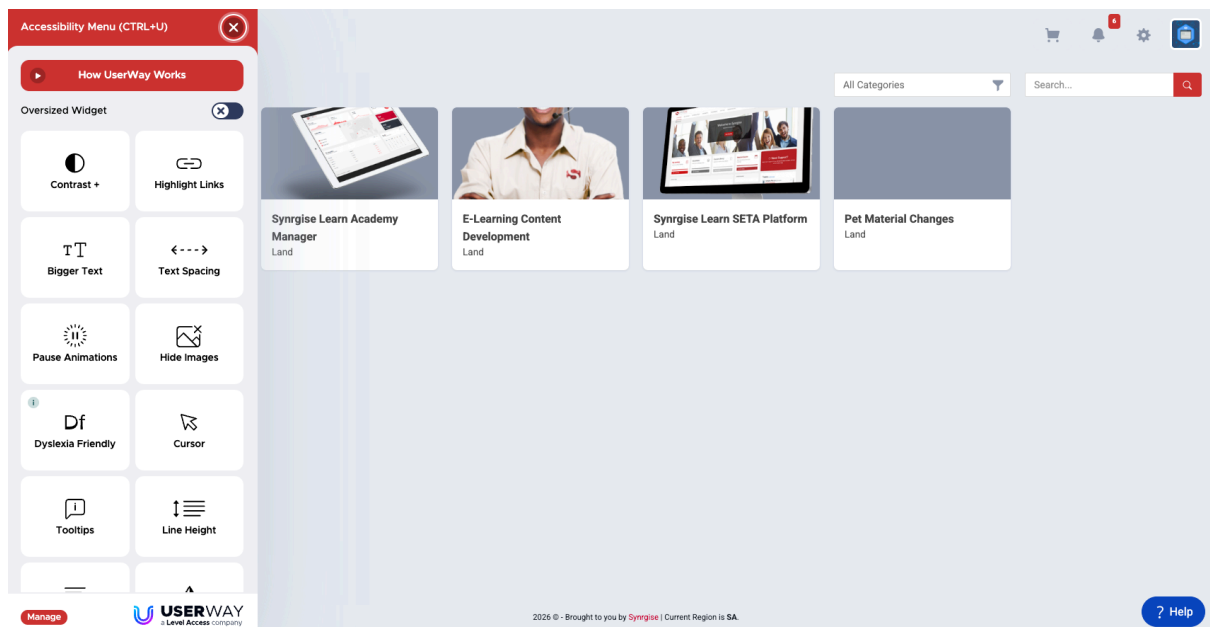
An AI coach that mediates between employees, managers, and L&D requires a visible, enforceable trust model. SynrgiseSensei implements this structurally, not just in policy.

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.

4. 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 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**.



5. Security and Compliance

5.1 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.

5.2 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.

5.3 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 configured during implementation, directly addressing Hollard's requirement for secure user synchronisation.

5.4 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.

5.5 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 configured during implementation to meet the specific requirements of regulatory auditors. Logs are exportable in standard formats and can be ingested into an enterprise SIEM.

5.6 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 configured during implementation.

6. Non-Functional Requirements

6.1 Performance

Average page load time is 0.396 seconds. The platform supports more than 1,000 concurrent users without performance degradation, with scaling handled horizontally through our hosting infrastructure.

6.2 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.

6.3 Availability

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

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

6.5 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.

6.6 Accessibility

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.

6.7 Extensible Platform Architecture

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.

7. Implementation Methodology

A high-level implementation timeline and commercial scoping is provided in the Commercial Proposal. This section sets out the technical methodology in more detail.

7.1 Phase Structure

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	1–2 weeks
2. Configuration and branding	Platform provisioned, organisational hierarchy modelled, branding applied, base roles configured	2 weeks
3. Integration and configuration	SSO, PaySpace, Entra ID, and configuration work completed and tested	3–4 weeks
4. Content migration and QA	50 SCORM courses migrated, historical completion data imported from Excel, end-to-end testing	2 weeks
5. Go-live and onboarding	Administrator training, learner communication, early-life support	1–2 weeks

7.2 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.

7.3 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.

7.4 Deployment and Onboarding Support

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. Our methodology is structured accordingly: the implementation focus is platform delivery, configuration, content migration, and initial training only.

8. Data Migration and History

8.1 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.

8.2 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.

9. Integrations

9.1 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 configured during implementation.

9.2 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.

9.3 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.

9.4 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.

9.5 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. CMI5 content playback is supported through a scoped configuration.

9.6 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 for AICC-wrapped courses from a host of other providers.

9.7 Enterprise BI and Reporting

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

9.8 Other Integrations

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

10. 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.