

User guide

# POC Request

## 1 Introduction

The TechPassport Proof of Concept (POC) workflow is our secret to how we negotiate lightning-fast POCs between financial institutions and technology suppliers. It is an intuitive and fuss-free way to negotiate contracts, enabling you to communicate with the supplier regarding specific conditions of the trial.

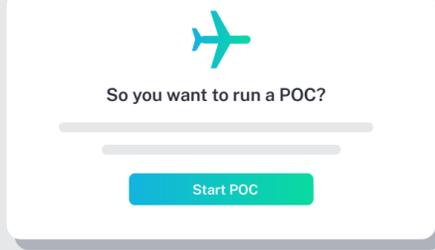
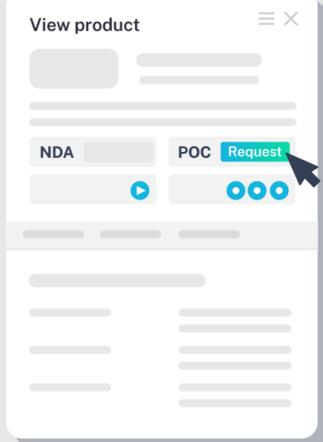
### POC statuses

- POC requested / in progress
- POC completed / active

## 2 Sending a request

### Requesting a POC

Sending a POC request to a supplier works in a similar way to an NDA. From the product profile select the 'Request' button next to 'POC'.

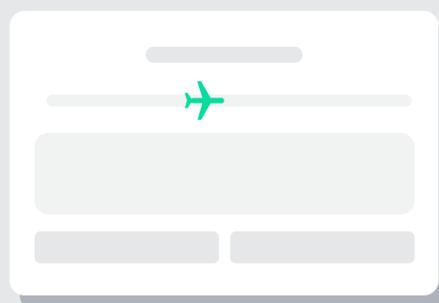
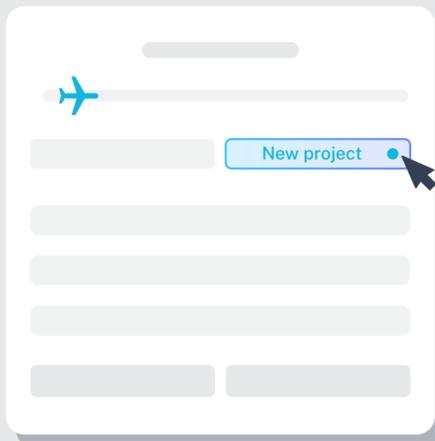


This will open a pop-up which allows you to file this POC under a company or individual project, or create a new project for your engagement.

### New projects

To create a new project fill in the following fields:

- Project name
- Project ID – in this section you can create a project ID that aligns with your internal filing system in Salesforce or Ariba
- Tech MD sponsor (if applicable) - who from your organisation will be needed to approve this contract for signature? NB: this field is only shown for some organisations, depending on their setup preferences

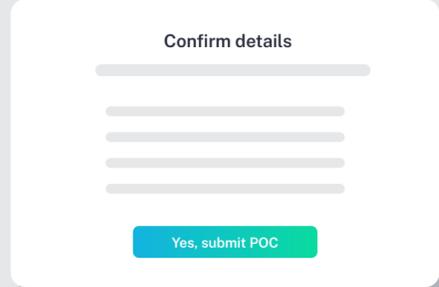
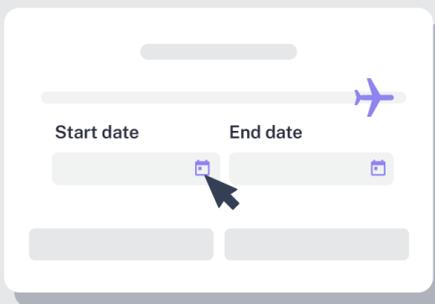


### ORGANISATION SPECIFIC

Depending on the preferences of your organisation, you may have additional fields here, such as to describe your project requirements or negotiate a trial fee. If these are available, complete the questions and move on to the next step.

### Trial dates

Next, choose a start date and end date for the trial. The default length is 90 days, so once you select one date the other will automatically follow.



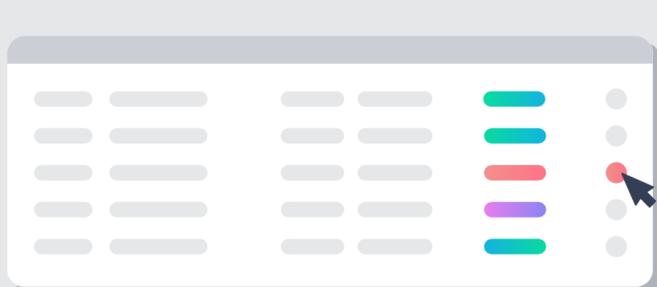
### Review and submit

Finally, review the POC details and select 'submit POC' if you are happy with them, or go back and amend details. The POC request is not submitted until you have confirmed the trial details and receive the confirmation message.

## 3 Next steps

- Review POC**  
If have requestor permissions on your account, the POC will be sent for internal review at each stage so super user can keep track of internal resources and budget. If you are a super user, this step is skipped and the POC is sent directly to the supplier.
- Supplier informed**  
Once the engagement has been signed off internally the vendor receives an email notification letting them know.
- Supplier reviews dates**  
They can then log in and view your suggested start and end date. If they feel these dates are not suitable they can reject these terms and suggest new ones, leaving you a comment to justify their reasoning.
- Dates confirmed**  
Once they have done this, you'll receive an email letting you know the supplier has responded and you are able to log in and review their comments. If you agree with the new start and end date for the trial, simply hit the tick next to the proposed date.
- Submit for internal review**  
Finally, a button will appear in the top right of the POC module allowing you to send the POC for one final internal review.

## 4 Trial agreed



### POC document

Once a super user has signed the document on the platform using our DocuSign API, you'll receive a notification, and from there you will be able to download the POC as a PDF from the Connections area. Once signed by the relevant people, you or your super user should send the fully executed contract to the vendor manually via email.

You and the supplier are now able to download a POC report with each other contact information and some of the key information related to the agreed trial.