

Unibuddy step up report

July 2019



'Step up' is a health check programme for start-ups and has been developed by Jisc in consultation with the sector and in partnership with Emerge Education. The health check aims to scrutinise start-ups against key sector requirements, to provide institutions with a certain level of assurance when they are considering engaging with these new enterprises. The accreditations awarded following the vetting process form general information only and are not intended to amount to advice on which an institution should solely rely.

Unibuddy has been assessed in July 2019 and is judged to be ready for full scale implementation. Based on our assessment the company has the capabilities for implementation at multiple institutions.

Unibuddy launched in 2017 and now works with over 160 universities and HE institutions across 23 different countries, including 23% of mainstream UK universities. They have a robust customer success team that enables the universities to get up and running on the platform quickly and support to enable them to get the very best from their subscriptions. They exceed most of the criteria, as a result of the existing scale of implementation. They also demonstrate an ability to work with customers to develop the product to meet user requirements.

UNIBUDDY LIMITED | Company Number: 09790742 | VAT No: 233 4360 34 |

Date of formation: 23rd Sept 2015 | Date of assessment: July 2019

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**ASSESSED
BY**  **2019**



Diego Fanara, CEO and Founder of Unibuddy, provides an overview and explains the problem and solution Unibuddy solves.

Unibuddy helps students thrive through sharing their experience, effortless technology and the smart application of data. This drives leads for universities, increases conversion to improve recruitment, and creates a sense of belonging.

Problem and Solution

Students struggle to find their best fit university, while universities are desperate to attract and recruit best fit students.

Increasing internationalisation in education means that universities are facing increasing competition to attract the best fit students - whether locally or internationally. Students are barraged with mass marketing and irrelevant information, and increasingly want to connect peer-to-peer with students who have been there before, giving them an authentic perspective on the universities they are choosing between. Unibuddy makes this connection possible - empowering universities to connect their prospective students with their current students. Our peer-to-peer platform is embedded in a university's website, enabling prospective students and applicants to browse student ambassador profiles, read student blogs and content, and sign-up to chat with the ambassadors via direct messaging.

This results in students being more confident about their decisions, more prepared to take the next steps in their application journey, and ultimately be better prepared for their study. This in turn brings in higher lead generation, stronger applicant conversion, and increased enrolment at universities.

Assessment summary table

Criteria		Assessed as
Legal requirements	Company registration	✓
	Insurance	✓
	GDPR	✓
Business proposition and solution	Articulated problem and solution	✓
	Working product	✓
	Existing implementations	✓
	Designed to meet user requirements and evidence of impact/efficacy	✓
	Consistent and validated pricing model	✓
	Financial track record and longevity	✓
Team and capacity	Background and skills	✓
	Development planning	✓
	Scalability	✓
Data and information security	Minimum technical requirements	✓ ¹
	Advanced technical requirements	✓
	Product integration	✓
	Good practise and accessibility	✓

¹ Limited personal data is also held by Mixpanel for analytics purposes. This data is held under the US-EU privacy shield.

Assessment details

Legal requirements		
Legal requirements	The company is legally established to trade within the UK.	✓
Insurance	The company has professional and employee's liability insurance.	✓
GDPR compliance	There are documented Security and Data Protection Policies, product Terms of Use and a licence agreement to ensure compliance with GDPR and a privacy policy.	✓
Business proposition and solution		
Articulated problem and solution	There is a clear definition of the strategic problem addressed by the solution. Its relevance to the UK HE/FE sector is validated through publications, research, government policy, or evidence of market demand.	Unibuddy empowers universities to connect their prospective students with their current students to attract and recruit best fit students. The importance of peer-to-peer for students has been evidenced through research and the success of the product. Case studies show the positive impact on different parts of the applicant journey; for example Middlesex University, showing a staggering 77% conversion from offer to enrolment amongst undergraduate offer holders using Unibuddy
Working product	The company can provide institutions with a working product ready for use.	It is possible to see the product in action via existing live implementations. The company can provide a test/demo account on request and / or provide a short training demonstration to interested institutions.
Existing implementations	The product has been used and evaluated through existing implementations, with success metrics defined and tracked consistently.	The product has been successfully implemented in over 117 universities since 2017. Each institution is able to track their key measures for success whether it is engagement (sign-ups), generating applications or conversion rates of applicants.
Designed to meet user requirements and evidence of impact/efficacy	<p>The product has been designed with user engagement in mind and the company is able to define and track successful use for reporting over the course of/at the end of implementation.</p> <p>The company's solution helps address individual institutional priorities and requirements and there is demonstrable impact of the solution on the problem.</p>	<p>Key success metrics are available via a dashboard with an overview of the number of visitors and sign-ups; number of conversations, country and subject of sign-ups, engagement of ambassadors. Universities are also able to access detailed analytics on their dashboard which will tell them who has signed up to use the platform; monitor the engagement of their ambassadors; as well as tracking enquirers through to application and enrolment.</p> <p>The product allows for universities to measure different objectives, whether it is generating new leads, converting leads to applications and converting offer-holders to enrolments.</p>

Consistent and validated pricing model	<p>The company has a clear pricing strategy and there is a consistent process in place for institutions wishing to buy and/or implement the product. The pricing model (if paid product) has been validated through existing customers (willingness to pay).</p>	<p>UK pricing packages are based on an annual subscription with different packages based on usage criteria and institution size. Pricing is based on the institution or department size measured in student FTE (four tiers).</p> <p>Additional products may be added to the subscription either from the start of a subscription, or as they are launched (e.g. Unibuddy live chat platform).</p> <p>The company has a customer services team to support the on-boarding process.</p>	✓
Financial track record and longevity	<p>The company meets the criteria for advanced level assessment with a financial track record of at least three years and an overall business risk of low to moderate.</p>		✓
	<p>In the panel's judgment, the company is likely to have sufficient funding and revenue to support operations for a minimum period of 12 months. Following seed funding of £1.6 million, they have just raised Series A funding of £4 million with projected revenue for 2019 of £3M.</p>		✓
Team and capacity			
Capacity and skills	<p>In the panel's judgment, the team possesses the skills, customer empathy, and execution ability necessary to enable effective implementation, including a clear management structure. The company has a team is made up of bright, expert developers and engineers, and a business team with a combination of entrepreneurs, experienced Higher Education professionals and Tech SaaS sales professionals.</p> <p>Business team:</p> <ul style="list-style-type: none">• Diego Fanara, CEO, Imperial College MSc Finance. 3 years experience as an entrepreneur and CEO.• Jonathan Tinnacher, CCO (20+ years experience working in HE Student Recruitment)• Jamie O'Connell, Director of Strategic Development (Co-founder of The Student Room and 12+ years of Ed Tech Experience)• Sales (x6) - Team Lead: Ed Evans, 3+ years SaaS sales.• Marketing (x1) - Team Lead: Monica Kulkarni, 13+ years in Education and Tech marketing.• Customer Success (x5) - Team Lead: Niall Mullins, 5+ years HE recruitment experience. <p>Solutions team:</p> <ul style="list-style-type: none">• Kimesha Naido, CTO, UCL MSc, 4 years experience in software engineering• Product (x2) - Team Lead: Yahya Wahbeh• Engineering (8) - Lead engineers: Zarko Parner, Dave Myler, Neeraj Suthar, Antoine Laurent• Data Science (2): Team lead Ionnis Karanankakis		✓
Development planning	<p>Customers are regularly engaged in product/service development activity and there is a consistent process</p>	<p>The company works with customer and users including institutional partners, student ambassadors and prospective students. Ideas are gathered via a</p>	✓

	for updates to customers on new and planned developments. Improvements to the product are made based on user feedback.	product board on the website which shows which features are under consideration, in development and launched. A Customer Advisory Board meets twice a year to inform the broader product direction. New products and features are communicated through regular feature launch newsletters and the Unibuddy Conference.	
Team scalability	The team possesses necessary skills and management structure in place for effective implementation with a minimum of two-three institutions. There is scalability planning in place for the team to meet growing capacity and support requirements. Proven track record of delivering live implementations and providing appropriate support to several institutions.	The company has a customer success team who undertake onboarding. The team have experience working at or with universities in the student recruitment area. The company is already operating at significant scale, having undertaken onboarded nearly 117 institutions, with 43 more in the pipeline. The company are continually growing the onboarding and customer success team, and developing processes and self-serve elements for each stage.	✓

Data and information security

* marks minimum technical requirements

Security awareness*	The company are certified by GCHQ and the National Cyber Security through Cyber Essentials certification. The company follows the NSCS 10 Steps for Cyber Security guidelines.		✓
Encryption*	All data is encrypted at rest using AWS EBS encryption. Unibuddy uses TLS 1.2 or above for data in transmission and AES 256 for data at rest.		✓
Data storage*	All data is stored in with AWS in London and Dublin regions. The product is hosted at AWS data centres in EU-west/Dublin		✓
	Advisory: Limited personal data is also held by Mixpanel for analytics purposes. This data is held under the US-EU privacy shield.		◆
Institutional questionnaires	The company has successfully completed several institutional data and security questionnaires. The company has prepared full functional and non-functional specifications to assist in answering questions from prospective partners.		✓
Password storage	All locally stored passwords used for user authentication follow OWASP guidelines. User passwords are hashed with a Bcrypt gen salt. There is a company Password Policy with reference to good password setting practices.		✓
Technology stack	The company has provided a description of the technology stack used/needed for implementation and can supply this on request.		✓
Penetration testing	The company has undertaken external penetration testing in March 2019, with the results used to identify and remove vulnerabilities.		✓
Product integration			
Third party systems	The product has integration with required institutional systems or other systems.	<p>The company provides a secure API which enables institutions to undertake automated data exports from Unibuddy and works in conjunction with the majority of modern CRM systems, but requires some technical knowledge.</p> <p>The company are investigating the feasibility of an embedded integration tool to link Unibuddy with Salesforce and Microsoft Dynamics.</p>	✓
Single sign-on	The product can integrate with institutional single sign-on and preferably integrate with the UK Access Management Federation.	Not applicable as product is pre-enrolment.	

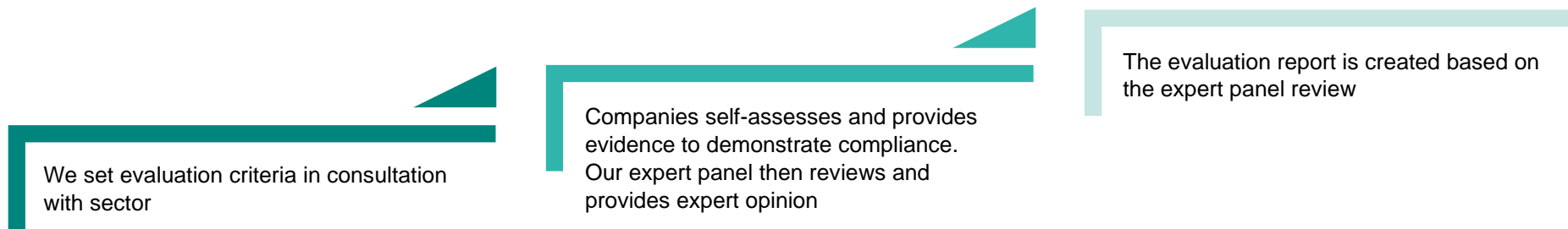
Good practice and accessibility

Source code management	The company uses Git to enforce version control and the repository is hosted on Github. Code reviews are enforced before any new code is merged. Test coverage consists of a comprehensive unit test suite, integration tests and regression UI tests. No code can be deployed to production unless tests are passed and further QA testing is undertaken before deploying to production.		✓
Accessibility requirements	The web service meets or has a plan to meet WCAG 2.1 checklist Level AA within required timeframes.	The company meets WCAG 2.1 level AA requirements, as verified/accredited by the Shaw Trust.	✓
	Mobile and desktop apps (where this is relevant) take into consideration accessibility best practice.	All Unibuddy user-facing products that are embedded on university websites are WCAG compliant. The Ambassador mobile app enforces consideration of accessibility through code reviews and our front end style guides. The company aim to achieve full WCAG compliance across all web, desktop and mobile apps.	✓
Backup requirements	The company has a backup strategy, including a policy on backup retention.	All backups are stored encrypted and run daily and stored for one month.	✓
Business continuity and service resilience	The company has a business continuity plan that addresses service continuity and resilience.	Unibuddy hosts all backend services on AWS-based deployment infrastructure through PaaS provider Heroku. Redundancy is achieved by hosting multiple dynos so that if one goes down, there are many other dynos that end users will be switched to.	✓
Welsh language			
Products for use in Wales need to provide Welsh versions	A statement of ability to provide a Welsh language version of any student or staff-facing products.	No Welsh-language version of the product is available.	◆

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In undertaking this level of due diligence, we hope to reduce some of the risks institutions face when working with start-ups and increase the level of collaboration between institutions and start-ups.

The healthcheck process: Overview of step up and how we assess



Step up is a joint initiative by Jisc and Emerge Education.

The accreditations awarded following the vetting process form general information only and are not intended to amount to advice on which an institution should solely rely.

Jisc

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