Context

Evolving Business Landscape

- Technological change is **accelerating at an unprecedented speed** and could create a world we can barely begin to imagine.

- There is a growing awareness among educators and families that **today's curriculum needs to evolve** to meet tomorrow's reality. Parents **receptibility to alternative learning methods** has increased

Shifting Paradigm

- Moving away from the conventional patterns of teaching and learning, the digital age is witnessing a sea change in the way **teachers are teaching** and **students are assimilating information**

- Covid-19 has brought about a **paradigm shift** to the ways industries operate. Although few trends have been around, this pandemic has **accelerated digital adoption by 3-5 years**

EdTech Play

- **Technology, specifically the exponential ones** such as Artificial Intelligence, Machine Learning, Mixed Reality (XR), Robotics, Internet of Things (IOT), Blockchain etc. hold the key to the **future of Education**

- By 2025 EdTech market is forecasted to grow to **$404B; $87B** of global EdTech funding is predicted over the next 10 years

Educator like no other…

- **With sixty years of providing quality education** for millions of children across the globe and proven success in using Technology to improve learning & teaching outcomes, GEMS Education is in an advantageous position to lead the way.

- Over the years, we have made significant investments in developing our **IP suite of products.** Investments in EdTech capabilities will not only **augment & strengthen** our brick & mortar school's digital capabilities & service offerings but also presents us with a unique opportunity to create **additional revenue stream**

Key Drivers

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Education industry is being disrupted

With technological changes **accelerating** at an unprecedented speed, education industry is moving away from the conventional patterns of teaching and learning and into the **digital age** with technology holding the key to the **future of education**.

Education model is changing
Traditional models of standardized learning by memorization is giving way to more **personalized, self-directed learning experiences** with digital learning content learning content gaining precedence over printed books

Students are digitally smarter than ever
Students now **rely on multiple sources** of information such as world wide web, education apps, self learning portals, intuitive videos, gam- based learning platforms, etc. for enhancing their knowledge

Exponential technologies are becoming a reality
Technologies like AI, XR, IoT, Blockchain etc. are poised to change the way we teach and learn both in the classroom and outside. These advanced technologies are enabling **personalised learning paths, enhanced learning outcomes & improved teaching experiences**

Data is the new currency
Data insights can provide a snapshot of **what students know, what they should know, and what can be done to meet their academic needs**. With intelligent insights & analysis educators can make informed decisions that positively affect **student outcomes & learning experiences**

Efficiency and Standardization are non-negotiable
To survive in the **new normal**, irrespective of organization size & scale, it is critical to build efficiency and standardization for core processes to enable them to **focus** on innovation and transformation

Despite being a crowded marketplace...

+ many more

# …EdTech realities for most brick and mortar schools haven't improved much

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Lack of an integrated platform for all school operational requirements under a unified umbrella

Source: Building an Integrated Student Information System in a K-12 School System, Information system education journal

Inability to provide seamless experience across all stakeholders due to use of multiple disparate systems

Source: Building an Integrated Student Information System in a K-12 School System, Information system education journal
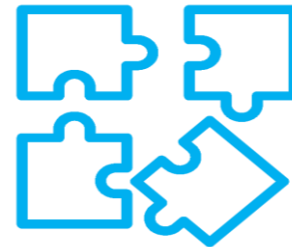
Absence of comprehensive EdTech products which address beyond one or two specific needs

Source: Usability and User Experience Evaluation of Learning Management Systems A Systematic Mapping Study, Conference paper
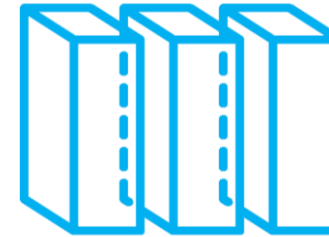
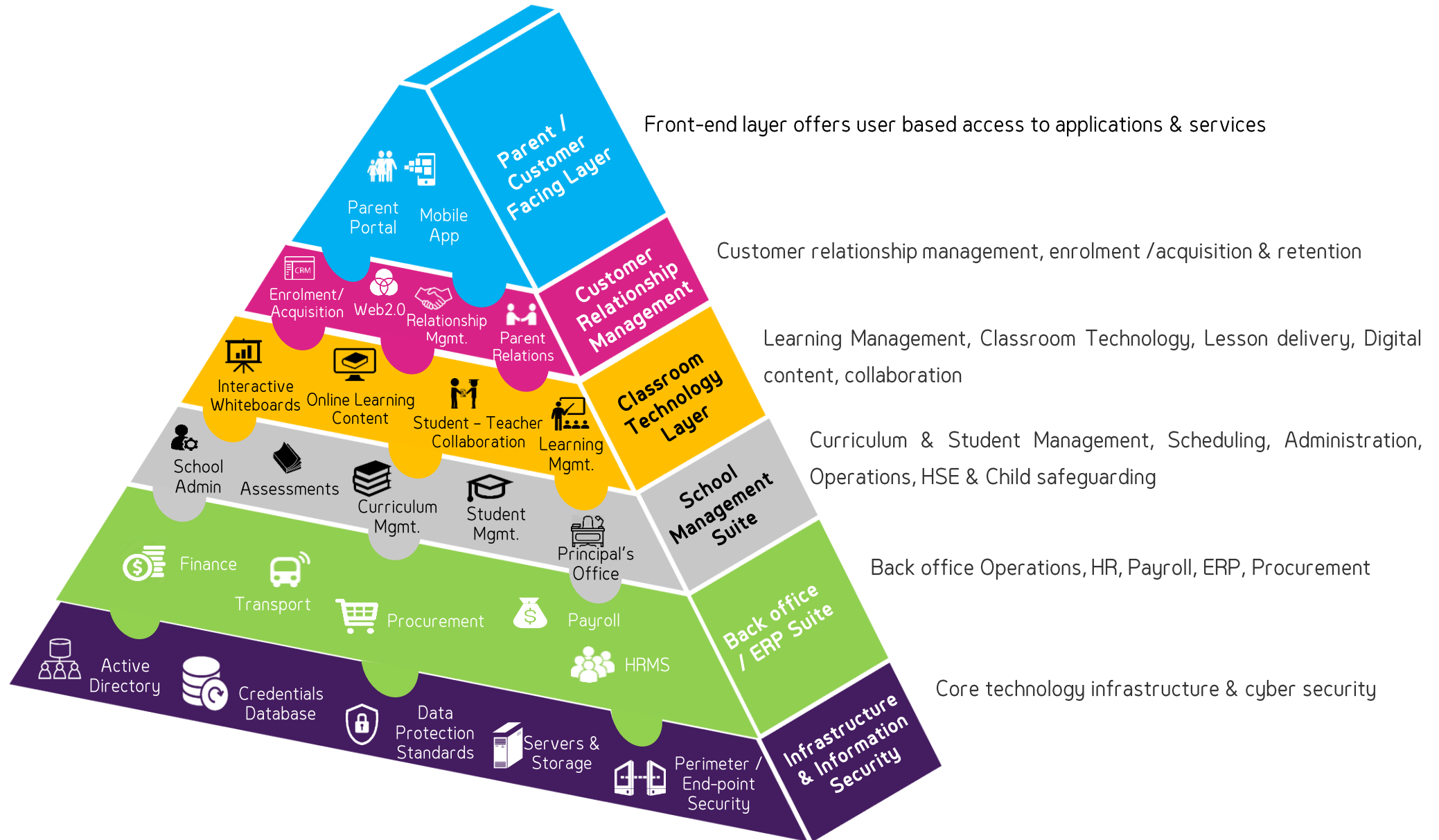Data silos hindering active use of learning analytics to enhance teaching and learning outcomes

Source: Published research article in International Journal on Integrating Technology in Education (IJITE) 2019

Lack of multi-curricula products catering to multi-regional requirements

Source: Accenture EdTech Research

School Technology Application Stack

Parent / Customer Facing Layer

Parent Portal · Mobile App

Front-end layer offers user based access to applications & services

Customer Relationship Management

Enrolment/Acquisition · Web2.0 · Relationship Mgmt. · Parent Relations

Customer relationship management, enrolment /acquisition & retention

Classroom Technology Layer

Interactive Whiteboards · Online Learning Content · Student – Teacher Collaboration · Learning Mgmt.

Learning Management, Classroom Technology, Lesson delivery, Digital content, collaboration

School Management Suite

School Admin · Assessments · Curriculum Mgmt. · Student Mgmt. · Principal's Office

Curriculum & Student Management, Scheduling, Administration, Operations, HSE & Child safeguarding

Back office / ERP Suite

Finance · Transport · Procurement · Payroll · HRMS

Back office Operations, HR, Payroll, ERP, Procurement

Infrastructure & Information Security

Active Directory · Credentials Database · Data Protection Standards · Servers & Storage · Perimeter / End-point Security

Core technology infrastructure & cyber security

PHOENIX

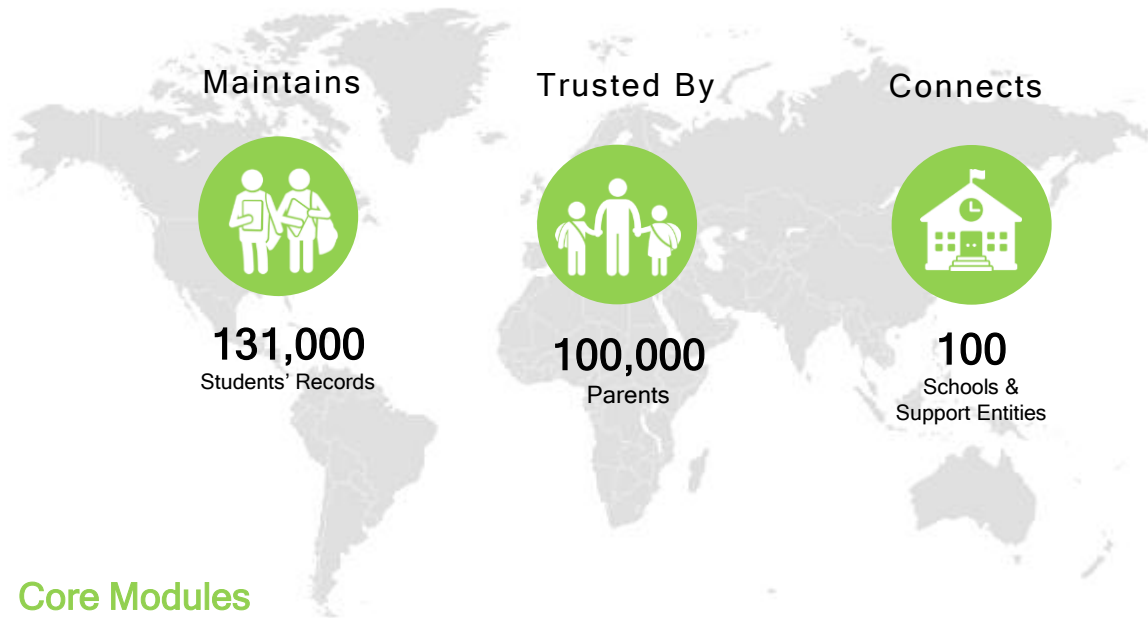End-to-End School Management System

Phoenix SMS | End-to-End School Management System

Phoenix is an integrated all-in-one school management system bringing together educational elements (academic, curriculum management, co-curricular activities etc.) and school operational elements (HR, Finance, Transport, Real Estate & Leasing Management, Contracts Management etc.) under a single umbrella

Phoenix SMS in Numbers

Maintains

131,000
Students' Records

Trusted By

100,000
Parents

Connects

100
Schools & Support Entities

Key Differentiating Factors

All-in-One Integrated Platform
Brings together educational & operational requirements under a single umbrella

Curriculum agnostic
Caters to multiple curricula such as US, IB, American, National etc.

AI Enabled Analytics
AI integrated platform for enhanced teaching & learning propositions

Ready to integrate APIs
Microservices enabled APIs to popular CRM, ERP, LMS, timetable & other applications

Simplified migration capabilities & tools
Simplified migration capabilities & tools with customized options to enable smooth transition

Regional customizations
Aligned to local Regulatory mandates like Educational ministry, taxation, health & safety guidelines

Core Modules

Academic Management
Effective management of school academics

Customer Management
Exhaustive CRM capabilities

Analytics
BI/ MIS capabilities for real time decision making

Backoffice ERP Suite
Eases school back office operations

Services Management
Manage ancillary services within the platform

Mobile App
Intuitive mobile app for parents

Phoenix SMS | Core Modules

Academic Management

Comprehensive suite of modules to manage school academics such as curriculum mgmt., attendance mgmt., assessments etc.

- Timetable Mgmt
- Student Mgmt
- Library Mgmt
- Curriculum Mgmt
- Special Education Needs (SEN)
- Progress Tracker
- Behaviour & Achievements
- Attendance Mgmt.
- Health & Wellness
- Assessment Mgmt.

Customer Management

Exhaustive customer relationship management features such as enquiries mgmt., enrolment /acquisition & retention, customer engagements etc.

- Customer Offboarding
- Enrolment Mgmt
- Messaging Services
- Re-enrolment
- Customer Engagements
- Parent Portal

Analytics

Harnesses BI/ MIS capabilities to enable data driven insights for informed / real-time decision-making capability.

- On-the-go Information
- Decision Support System
- Single source of truth
- Sentimental Analysis
- Multi-level information
- Departmental MIS /BI
- Actionable Reports
- Self Service Reporting

BackOffice / ERP Suite

Eases school operations through back-office modules such as revenue Mgmt, HR & payroll, finance &procurement etc.

- Book Sales
- Revenue Mgmt.
- Procurement
- HR Mgmt
- Financial Accounting
- Employee Self-Service
- Payroll
- Personal Development Program
- Staff Attendance
- Visa Mgmt.

Services Management

Easily manage all the services within the platform such as transport, contract & licensing Mgmt, staff accommodation, catering mgmt. etc.

- Catering Mgmt.
- Transport Mgmt.
- Activity Mgmt.
- Contract & Licensing Mgmt.
- Facilities & Maintenance
- REALM
- Real Estate & Leasing Mgmt.

Mobile App

Intuitive mobile app for parents to have access to their child's academics info, raise service requests, pay fees, on-the-go etc.

- Smart Genie
- Comprehensive Dashboard
- Circulars & newsletters
- One-Stop Shop on Academics
- Parents & Students' Info
- Exhaustive Timetable
- Service Request Facility
- Bus Locator
- Fee Mgmt.
- School Search & Enrolment

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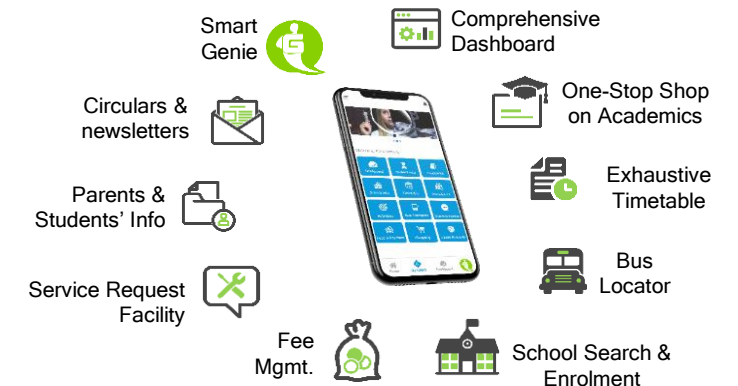
Phoenix RISE | Web app

Best Implementation of Technology to enhance Customer Happiness
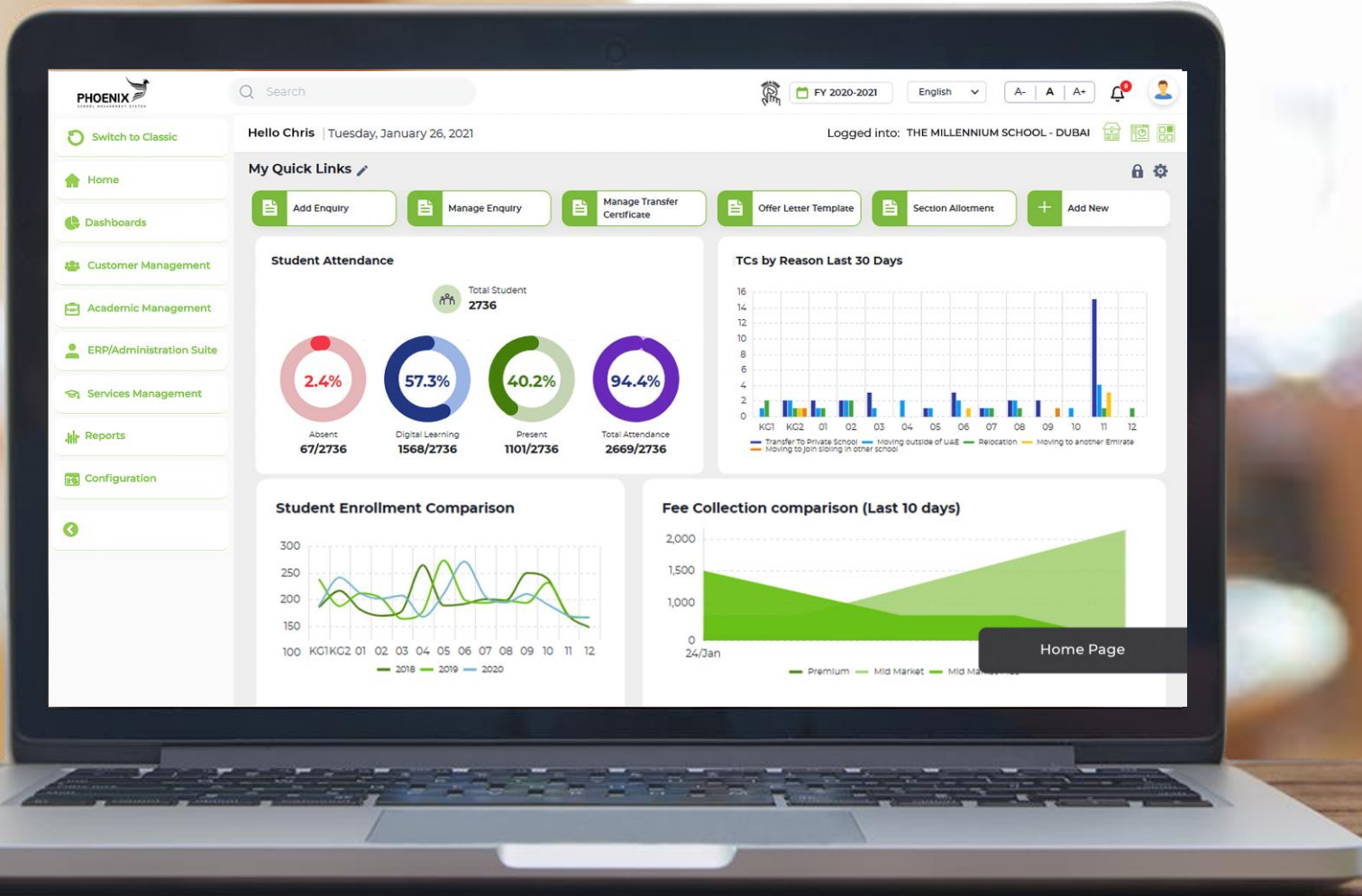
Customer Happiness & Summit Awards 2019

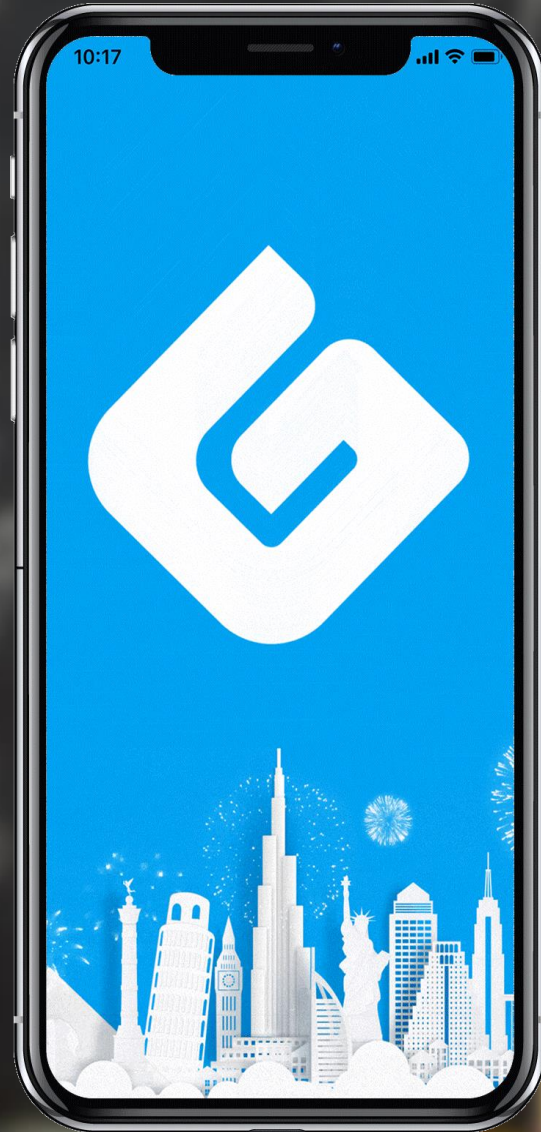**Best Business Transformation Initiative of the Year**

GEC Awards 2019

Education Transformation Project of the Year

Enterprise Transformation Summit & Awards 2019

Phoenix SMS | Mobile App

Mobile Excellence Award

NextStep Innovation Awards 2019

Best Implementation of Mobile and Apps to enhance Customer Happiness

Customer Happiness & Summit Awards 2019

Phoenix RISE | Internal Feedback

Current GEMS IP Suite ▶ **Phoenix RISE**

83.2% Good & Very Good rating based on feedback from Phoenix core users (5K+) post production revamp

In app feedback

😊	😐	😞
88%	**7%**	**5%**
Satisfied	Neutral	Looking for more

Based on feedback from 413 users post stabilization period
(3 months after app launch)

Public Store Ratings

connect

🤖	🍎
4.0 / 5	**4.1 / 5**
Based on 432 ratings	Based on 209 ratings

Rating on public stores for competitor School Management Systems

	🤖	🍎
SIMS Teacher app	2.1 / 5	2.7 / 5
ManageBac	1.7 / 5	1.9 / 5
PowerSchool Mobile	2.8 / 5	4.4 / 5
isams iParent app	3.0 / 5	4.2 / 5
Arbor Education	2.3 / 5	2.2 / 5
My Class Campus	3.6 / 5	4.0 / 5

- Survey rolled out on 6-Mar-19
- 4,612 users have responded out of ~5K Core Phoenix Users (Overall 12.2K users, which includes Core- 5K , ESS - 6.7K & Services - 500)
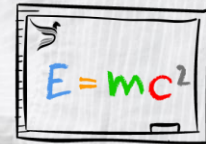
Classroom | Advanced Learning Management System / VLE

Classroom is an advanced learning management system where students, parents and teachers come together and collaborate. Classroom helps teachers manage educational activities with students while keeping parents fully informed about the progress.

Classroom in Numbers

88,250
Students

71,000
Parents

6,575
Teachers
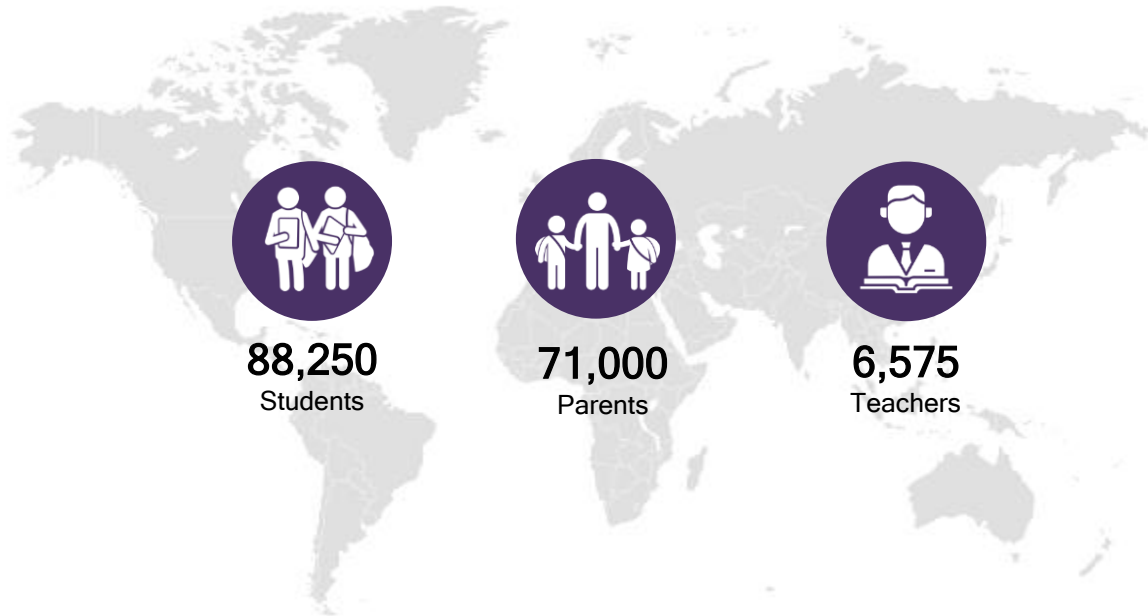
Key Differentiating Factors

Blended Learning capabilities
Provides blended learning capabilities for enhanced teaching & learning propositions

Synchronous / asynchronous lessons
Provides both synchronous and asynchronous lesson delivery

Comprehensive Parent View
Comprehensive parent view to keep track of their child(ren)'s learning needs & progress

Built in analytical capabilities
Ability to track and monitor student progress based on key data points

Multi-lingual support
Supports regional language(s) in addition to English

Omnichannel experience
Multiple user touch points over web and mobile that connect seamlessly

Classroom | Product Features

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Teachers

- Deliver live (synchronous) lessons
- Plan & schedule synchronous lessons
- Allow cross school teaching
- Monitor student progress tracking
- Create lesson plans & resources
- Mark student's attendance
- Create assignments for students
- Create auto graded quizzes
- Allow recording parent engagement
- Track student behaviour & achievements

Students

- View, track & complete assignments
- View quizzes online & submit them
- View progress tracking showing achievements
- Collaborate with teachers and peers through Chatter
- Access to resources through knowledge hub
- Be physically active through instructional videos
- Create digital portfolio with badges etc.
- View achievements through exemplary wall
- Set personal goals through planner
- Share documents through vault

Parents

- View child(ren)'s digital portfolio
- View student attendance, apply for leave
- Access learning content through Knowledge Hub
- View school calendar including events
- Stay updated on school news, announcements etc.
- 360-degree dashboard to view learning journey*
- Access grades, overall student progress through academic corner*
- Ability to share circulars, gallery etc.
- Pay fees directly through the portal*
- Raise service requests for TC, re-enrolment etc*

*Functionalities part of Dec- 20 release

Classroom | Web App

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Classroom

Login

Username

******

Password hints

Submit

Trouble signing in?
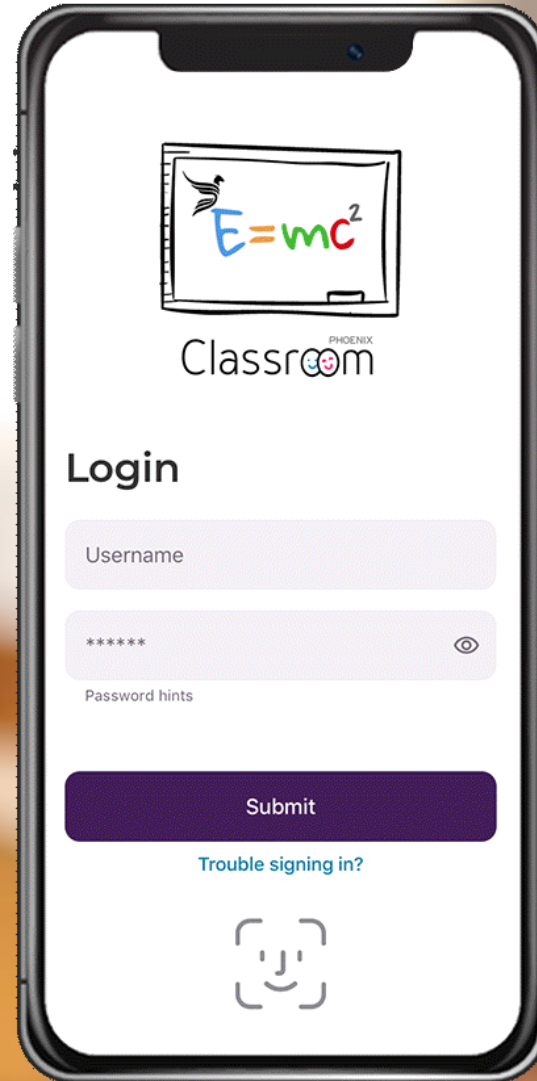
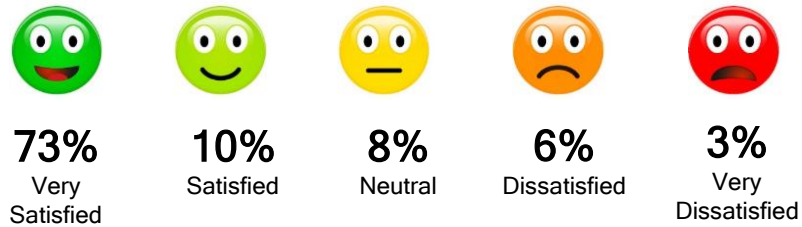# Classroom | External Feedback

83% Very satisfied & satisfied rating based on based on Classroom app feedback feature

In app feedback

73%	10%	8%	6%	3%
Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied

Based on feedback after product rollout

Classroom PHOENIX

4.4 / 5	3.7 / 5
Based on 432 ratings	Based on 209 ratings

Rating on public stores for competitor Learning Management Systems

		🤖	🍎
	Google Classroom	2.4 / 5	1.5 / 5
	Firefly	2.0 / 5	1.6 / 5
	Edmodo	3.7 / 5	4.0 / 5
	Schoology	2.3 / 5	1.3 / 5
	Frog Education	1.7 / 5	1.5 / 5
	Nearpod	3.2 / 5	3.1 / 5

HSE | Health & Safety and Child safeguarding application

HSE is a custom-built health and safety and child safeguarding solution with configurable workflows managing complete incident, audit and task management along with comprehensive reporting / dashboard capability

HSE in Numbers

68 Entities

15K+ Users
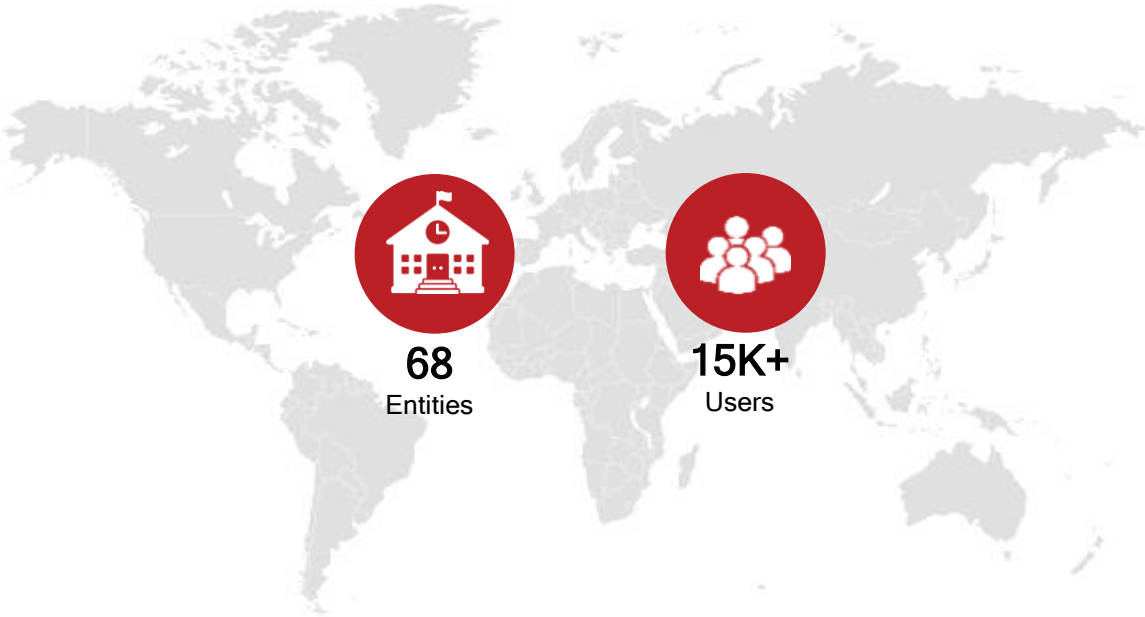
Key Differentiating Factors

Custom built Solution
Tailor made solution to address HSE and child safeguarding

Incident Management
Report, manage and analyze risk events across schools

Child Safety
Record and track incidents for safeguarding the welfare of all children

Data Collection
Connect, record, monitor, calculate, analyze and report on key data metrics

Policy Management
Automated workflows on accessing, acknowledging and signing key internal policies

Audit Capabilities
Easing the administrative burden of audit and inspection process through automation

HSE | Product Features

Incident Management

Log all the HSE incidents with required details and track the status

Audit Management

Define audit and inspection plans per school & track progress

Reports & Dashboards

Comprehensive dashboard with analytics & alerts

Tasks Assignment

Create, assign and track tasks through configurable workflows

SLAs Tracking

Track SLAs based on category, criticality and other parameters

Score Cards

Overall analysis of various processes within school & at group level

Resource Library

One stop shop for all health & safety documents

Child Safeguarding

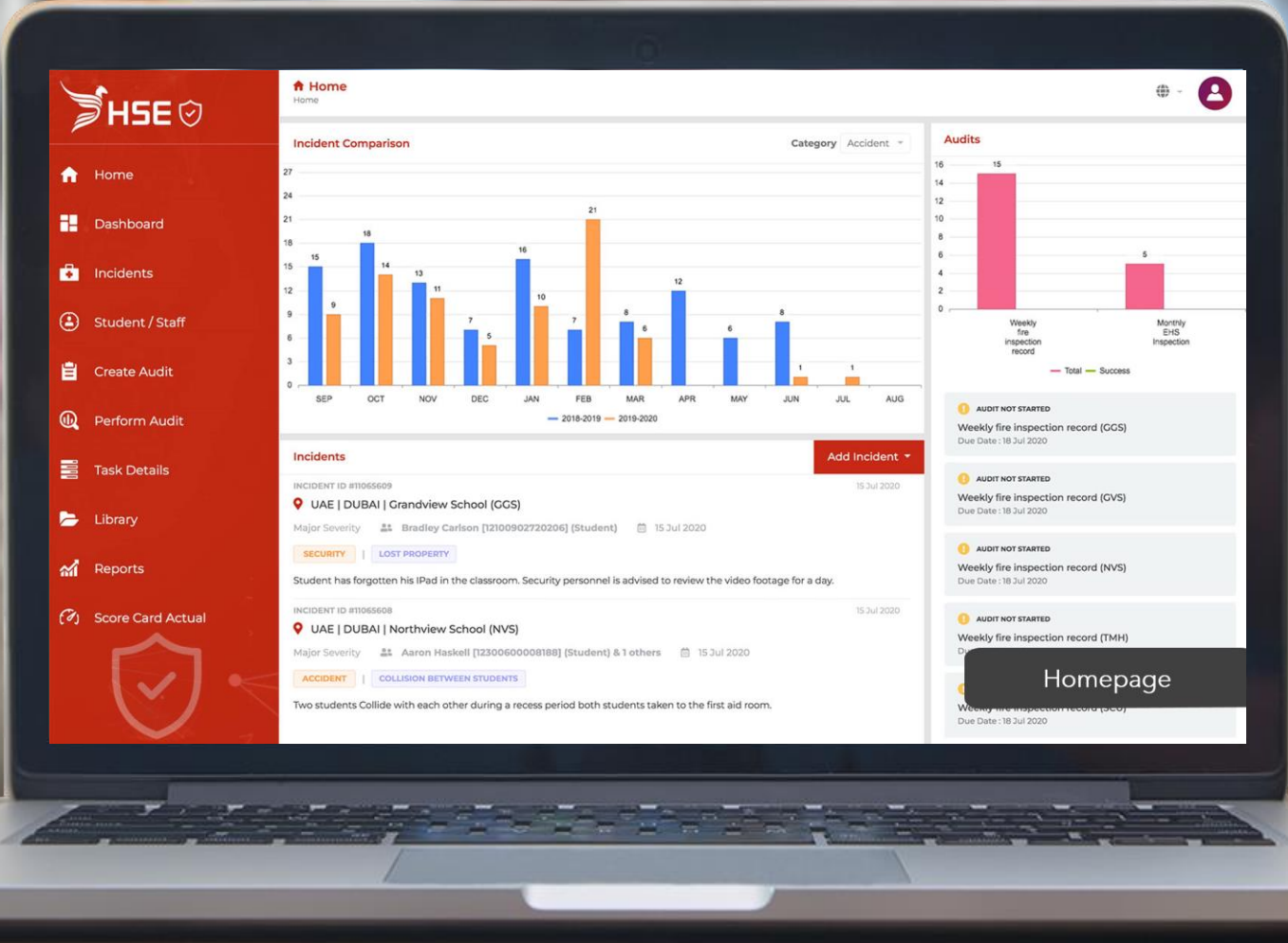Critical child safeguarding incident tracking and follow up

Profile

Safeguarding profile for each student at click of a button

Alerts

Configure automated email alerts on tasks, inspections, etc.

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HSE | Web application