Invitation to Tender

BHBIA Website Project

October 2017

The British Healthcare Business Intelligence Association has decided to replace its existing website (https://www.bhbia.org.uk) and is seeking to find a suitable supplier that is able to deliver the project requirements in a timely, professional and economical manner.

This document together with the supporting documentation is intended to give suppliers sufficient information so that they can state:

- whether they are interested to supply,

- overview of their proposed technical solution,

- estimated time to build and implement,

- whether any elements would be outsourced

- development costs (showing split between website theme, main site functionality, Training microsite functionality and individual costs for each item of new functionality)

- anticipated ongoing costs to cover hosting and maintenance

- costs for BHBIA to own the website code,

- Design ideas and examples

- Include references / testimonials for similar website projects

We require responses to be received no later than 4:00pm on 16th November 2017.

Please email responses to admin@bhbia.org.uk

1   Background / Overall Design Objectives for the Site

The core aim of the BHBIA is to promote the excellence with integrity of Business Intelligence within the Healthcare Industry. Our members are drawn from pharmaceutical/ healthcare companies and the agencies/consultancies that supply business intelligence services to those companies.

For more details of the specific aims of the organisation see https://www.bhbia.org.uk/aboutthebhbia/constitution.aspx for the Articles of Association (2 – Objects).

Whilst this brief is strongly focussed on functionality, this reflects our need to make clear the complexity of our requirements, and should not imply a lack of prioritisation of the design elements. We are very conscious that the design and navigation is what will have most impact on our members and their current perceptions are that the site is outdated, with old fashioned language and design, and is difficult to navigate. Therefore it is a priority to address this.

As the website is designed for a professional audience, it should be professional in look/feel whilst also communicating the volume of content available on the website and the benefits of membership in a tone that's more personal/friendly than at present and that's visually less crowded/text heavy.

Therefore, design ideas and options – particularly for the home page - need to be a key part of the proposal.

Who are our customers?

The following is a list of the people we believe mainly use our website, in rough order of priority.

1. Full members – pharmaceutical/healthcare companies, agencies and freelancers – these are our most important group and the site needs to be geared towards helping them find the information they need to engage with the BHBIA

2. Certified non-members (See 1 – Membership categories for full explanation) – have limited access, but need to be able to see what else is available, as some are important targets for conversion to full membership

3. Non-members from companies that are eligible to join (same types of companies as members) – these need to be easily able to find information about joining, and clear explanation of the different options

4. Non-members who would not have reason to join the organisation but need to find information – these could include regulatory bodies and professional associations – these groups are most likely to be looking for guidelines information. There are also individuals within other departments (outside business intelligence) in member companies, who have not (yet) chosen to register as part of their company's membership, so are effectively visiting the site as a non-member, again most likely to be looking for guidelines information

5. Less important targets – but possible areas for future development are: 1. Healthcare professionals – there's no specific content at present, but the idea of a web resource explaining about what market research involves and BHBIA members' professional standards has been suggested in the past and is something we may want to consider 2. General public – 2 groups could be (i) patients considering taking part in market research and (ii) people interested in a career in healthcare BI. At present there is a limited amount of content available for group (ii).

See also 16.15 Home Page Specific Content Management Requirements.

2 Project Objectives

The BHBIA Website Project objectives are to:

1. Provide a reliable, secure and responsive replacement to the existing website

   http://www.bhbia.org.uk that will provide a stable foundation for future growth and provide an economical solution.

2. Replicate the existing functionality with required amendments and add new functionality to enhance the website and increase the efficiency of the website administration.

3. Provide a structured approach to allow and facilitate the specification and addition of new functionality in an efficient and effective manner during subsequent releases.

4. Utilise optimal software and technology that will assist in the development of the BHBIA existing and anticipated website requirements — in terms of functionality, future proofing, risk management, cost, efficiency and effectiveness.

3 Technology

The use of effective content management, existing software libraries, pre-written code and advanced technologies is desirable in order to increase efficiency and reduce the risk.

Further, it is also highly sought that the suppliers proposed software and technologies to build the website are technically acclaimed and likely to have a secure future in order to protect the BHBIA initial and longer term investment.

The new functionality must facilitate the BHBIA's ability to comply fully with the requirements of the General Data Protection Regulation (GDPR) as far as the management of members' personal data is concerned.

The website must be responsive – to optimise display on mobile devices.

Proposals should also include information about SEO.

4 Supporting Documentation

The supporting documentation to this document consists largely of 'Screen shots' illustrating the features as currently anticipated to be seen by users of the website. This is intended to break the website specification up into manageable units and make it more tangible for discussion, review and amendment. The features the screens depict are also listed within the "Features by Users" document.

Please note the Screen shots are intended to show functionality but not the 'look and feel' of the new BHBIA website. In order to show the functionality the current design has been used in order to portray how functionality may fit within a user's web browser.

The "Features by Users" document aims to describe how particular types of users will interact with the website. For example, a member will experience different features to those of a non-member. Further, a 'members only event' should only be available for booking by a member, members privileged information should only be available to members and so on.

Supporting documentation provided in addition to this document consists of:

1. Terminology
2. Types of Users
3. Access
4. Features by Users
5. Screen shots (appendix A-V)
6. BHBIA Brand Guidelines (appendix W)

5 More Information?

If you require any further information please do not hesitate to contact the BHBIA Office by email at admin@bhbia.org.uk or phone 01727 896085.

If you should wish to forward supporting literature by mail please send to:

FAO: Tina Clayton
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British Healthcare Business Intelligence Association
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Terminology

1   Membership Categories

Corporate Member

The membership category for either 'Industry' or 'Agency' Corporates charged at £482 + VAT per annum. A Corporate Member may have unlimited individual Members/users.

Corporate Affiliate Member

The membership category for either 'Industry' or 'Agency' Corporates that is affiliated to an existing Corporate Member and charged at £355 + VAT per annum. A Corporate Affiliate Member may have unlimited individual Members/users.

Personal Member

The Personal membership category charged at £137 + VAT per annum. A Personal Member is limited to an individual that supplies BI or consultancy service to healthcare companies.

Corporate Certified Non-Member

The membership category for either 'Industry' or 'Agency' company which are entitled to take the BHBIA competency tests plus limited privileges and is charged at £495 + VAT per annum. A Corporate Certified Non-Member may have unlimited individual users.

Personal Certified Non-Member

The Personal membership category for either 'Industry' or 'Agency' which is entitled to take the BHBIA competency tests plus limited privileges and is charged at £145 + VAT per annum. A Personal Certified Limited Member is limited to an individual.

NOTE: Corporate, Corporate Affiliate and Personal Members are classed as Full Members and receive all membership benefits / website access.

Corporate Certified and Personal Certified Non-Members are classed as Certified non-members and receive limited benefits / website access.

2   Types of Users

Anonymous User - is a user who has not registered and therefore cannot log in. Anonymous users can only access public pages on the website and therefore are not included when all users are referenced throughout this document.

Registered User - is a user who has registered and as such provided required information. They have very limited access.

Full Member User - is a registered user who has provided additional member information and been assigned to a Member Organisation. (includes Personal members but they are not assigned an organisation) These have full membership access on the site.

Full Member Administrator User - is a Full member user who has also been assigned the role of administrator. Note, there should only be one person per organisation with this role and all Personal Members are assigned this role.

Full Member Main Contact User - is a Full member user who has also been assigned the role of Main contact. Note, there should only be one person per organisation with this role.

Certified Non-Member User - is a Non-Member User who has limited member access on the site. (includes Personal certified non-members but they are not assigned an organisation)

Certified Non-Member Main Contact User - is a Corporate Certified Non-Member user who has also been assigned the role of Main contact. Note, there should only be one person per organisation with this role.

Certified Non-Member Administrator User - is a Corporate Certified Non-Member User who has also been assigned the role of administrator. Note, there should only be one person per organisation with this role.

BHBIA Administrator User - is a registered user who has been given privileges to maintain the website and user information on behalf of the BHBIA.

Lapsed Users – Users who previously were any of the above types of users, but whose membership has lapsed due to non-renewal, removal by Administrator / Main Contact users or BHBIA Administrator users

3 Access

Below is a summary of additional content/actions that can be accessed when logged in (& cannot be done without logging in) Many of these actions can be accessed via the 'My Member Account' right hand menu that appears when logged in. But generally the actions can also be reached via other web pages (e.g. BOBI entry forms via the BOBI pages) - a login prompt appears when attempting to access a restricted page).

Registered Users can:

-        View the online training slides (but not take tests)
-        Book for training courses (at full/non-members price)
-        Enter the BOBI panel-judged awards (for a fee)
-        Submit a conference paper synopsis
-        Submit a job advert (for a fee)

Note: a significant number of registered users may be people who actually belong to a member company, but who haven't needed to get full access or haven't realised that they could.

Certified non-members (Corporate or Personal) Users can:

-        All the above registered users access PLUS:
-        Take the online tests and obtain certification
-        Make changes to the company's details and update who's listed (designated 'Main Contact' and 'Administrator' only)

Full members (Corporate, Affiliate and Personal) Users can:

-        Take the online tests and obtain certification
-        Make changes to the company's details – including what's displayed in the Member Directory and update who's listed (designated 'Main Contact' and 'Administrator' only)
-        Book for training courses at discounted prices
-        Book for member only events – e.g. Conference
-        Book for webinars
-        Enter all BOBI awards categories free of charge
-        Submit a conference paper synopsis
-        Submit a job advert free of charge
-        Submit content for the Journal/Yearbook and access these publications online
-        Submit online news items
-        Submit ad hoc guidelines queries to the ethics advisor
-        View member only resources – e.g. the Useful Industry Facts and Data / Webinar recordings
-        View the full member directory (Note: when not logged in only the short (company names) version is viewable. When logged in, full members are automatically diverted to the full version (with contact details) when they click on the Members Directory tab in the main menu as well as the right hand member menu)

Full details about accessible features can be found in the next section

Project Scope and Specification - Features by User Contents

Project Scope and Specification- Features

1   User Management

1.1   *User Registration*

Anonymous User – two options

Option A) Anonymous user can register free of charge to become a registered user (https://www.bhbia.org.uk/howtojoin/registereduserregistration.aspx).

User will receive an automated email confirming they have joined as a registered user (text for this is editable by the BHBIA Administrator User.

Option B) Anonymous user can join a company's existing membership – Corporate, Affiliate or Corporate Certified Non-Membership to allow them to access all aspects available for that membership category (https://www.bhbia.org.uk/howtojoin/individualuser.aspx)

Anonymous users will need to enter a unique email address which cannot already have been used.

Any Full Member User or Corporate Certified non-member user can complete option B above on someone else's behalf, as long as they are logged out and all details, especially email address must be for the person they are wishing to join an existing membership and automated emails will be sent to the person joining not the person completing the form.

BHBIA Administrator User

Automated emails are received when either option A or B above is completed and then the following action is required:

Option A) No action is required for registered users

Option B) BHBIA administrator must open the anonymous user's registration and select the company for them to be connected to in the database and approve the registration or decline if the company is not a current member. On approval/decline an automated email is sent to the anonymous user. Please note text for any automated email is editable by the BHBIA Administrator User.

1.2   *Login*

All users will be able to login with email address and password (https://www.bhbia.org.uk/login.aspx).

1.3   *Request New Password*

All users will be able to request a new password from the login page. An automated email will be sent to the user, which will include a link back to the website where they can reset their own password.

1.4   *Change Password*

All users will be able to change their password, once logged in through the 'Your member account' menu. Users will need to complete old password and then enter a new password, along with answering a security question, completed at registration.

2   Membership Applications

A particular challenge is how to communicate the membership options in a clear and concise way, given their complexity. As well as the different types of membership there is added potential for confusion because membership (apart from personal members) is at company level, and individuals need to understand that 'joining' may simply mean registering as part of their company's existing membership as opposed to completing a membership application. There is also the potential for confusion around the 'certified non-members' categories, given that they are non-members yet we refer to them as a type of 'member' which involves 'joining' the BHBIA.

We welcome suggestions to provide more clarity. For example perhaps a flow chart: "which options are available to me?" where user inputs whether they are pharma or agency, single-handed or part of a company, and options are then filtered.

2.1 *Corporate Membership Application*

Anonymous User or Registered Users can apply for their organisation to become a Corporate Member. The Corporate Membership Application online form (https://www.bhbia.org.uk/howtojoin/corporateregistration.aspx - see all 6 tabs) must be completed and they either make a payment / request an invoice. Note: Agency applicants must provide details of two references and upload the references provided in any file format.

The user will receive an automated Corporate Membership Application email. As a Registered User who has submitted a Corporate Membership Application it will be recorded against their account noting Pending Approval.

BHBIA Administrator

When a Corporate Membership Application is made the BHBIA Administrator will receive a notification email. The email will include all application details and for agencies a link to the two references. The BHBIA administrator can then approve/decline the application. If approved the company must be ticked as paid to make the company / user records live in the database / on the website.

2.2 *Corporate Affiliate Membership Application*

Anonymous User or Registered Users can apply for their organisation to become a Corporate Affiliate Member. The Corporate Affiliate Membership Application online form (https://www.bhbia.org.uk/howtojoin/affiliateregistration.aspx - see all 6 tabs) must be completed and either make a payment / request an invoice. Note: Agency applicants must provide details of the associated current corporate member and upload a reference in any file format.

The user will receive an automated Corporate Affiliate Membership Application email. As a Registered User who has submitted a Corporate Affiliate Membership Application it will be recorded against their account noting Pending Approval.

BHBIA Administrator

When a Corporate Affiliate Membership Application is made the BHBIA Administrator will receive a notification email. The email will include all application details and for agencies a link to one reference from the associated Corporate Member. The BHBIA administrator can then approve/decline the application. If approved the company must be ticked as paid to make the company / user records live in the database / on the website.

2.3 *Personal Membership Application*

Anonymous User or Registered Users can apply to become a Personal Member. The Personal Membership Application online form (https://www.bhbia.org.uk/howtojoin/personalregistration.aspx - see all 3 tabs) must be completed and the either make a payment / request an invoice. Note: Applicants must provide details of two references and upload the references provided in any file format.

The user will receive an automated Personal Membership Application email. As a Registered User who has submitted a Personal Membership Application it will be recorded against their account noting Pending Approval.

BHBIA Administrator

When a Personal Membership Application is made the BHBIA Administrator will receive a notification email. The email will include all application details and links to two references. The BHBIA administrator can then approve/decline the application. If approved their record must be ticked as paid and approved to make the record live in the database / on the website.

2.4 *Corporate Certified Non-Member Application*

Anonymous User or Registered Users can apply for their organisation to become a Corporate Certified Non-Member. The Corporate Certified Non-Member Online Application form (https://www.bhbia.org.uk/howtojoin/corporatenonmemberregistration.aspx - see all 5 tabs) must be completed and the either make a payment / request an invoice.

The user will receive an automated Corporate Certified Non-Member Application email. As a Registered User who has submitted a Corporate Certified Non- Member Application it will be recorded against their account noting Pending Approval.

When a Corporate Certified Non-Member Application is made the BHBIA Administrator will receive a notification email. If payment has been made, no further action is required on the website. If payment is received separately to the application, the BHBIA administrator will need to tick the company record as paid for to make the company / user records live in the database / on the website.

2.5 *Personal Certified Non-Member Application*

Anonymous User or Registered Users can apply to become a Personal Certified Non-Member. The Personal Certified Non-Member Online Application form (https://www.bhbia.org.uk/howtojoin/personalnonmemberregistration.aspx - see 2 tabs) must be completed and the either make a payment / request an invoice.

The user will receive an automated Personal Certified Non-Member Application email. As a Registered User who has submitted a Personal Certified Non- Member Application it will be recorded against their account noting Pending Approval.

BHBIA Administrator

When a Personal Certified Non-Member Application is made the BHBIA Administrator will receive a notification email. If payment has been made, no further action is required on the website. If payment is received separately to the application, the BHBIA administrator will need to tick the user record as paid to make their record live in the database / on the website.

2.6 *Upgrading / Moving Contacts*

In the database, BHBIA Administrators users can upgrade Registered Users to attach them to a member organisation, by selecting the company they are employed by. BHBIA administrators can also move users from one member organisation to another.

Each individual has a unique identifier, meaning that they can move between organisations and retain their BHBIA history

2.7 *Lapsing Members/Users*

In the database, BHBIA Administrators users can lapse any Full Member users / Certified Non-members/ Registered users. BHBIA Administrators can also lapse Full Members / Certified Non-member organisations, which in turn automatically lapses all users associated with that organisation.

2.8 *Amending Main Contacts / Administrators*

In the database, BHBIA Administrator users can allocate the role of main contacts / administrators as required by the member. This cannot be done by any other user.

3 Membership Renewals

On the 1st September, all Member organisations / user records are set automatically to unpaid. Members can take the online tests anytime from 1st September onwards but they will only be dated to end of October that year, until their member organisation is ticked as paid, automatically making all users paid, which in turn automatically updates all certificates (taken on or after 1st September that year) to 31st October the following year. (see online training section.) In the database BHBIA Administrators can set organisations to paid when required and manage fees for all membership categories. The system automatically calculates pro rata rates for new applications. On the 25th October, the system will automatically email all live Full Member / Certified Non-Member users to remind them about certification test renewals. On the 1st November, the system will automatically email all live Full Member / Certified Non-Member users about their certification tests expiring. Text for these emails can be amended by BHBIA Administrator. (Currently these emails are being batched and sent manually by our website developers because of concern about the large volume of emails required, but ideally a new system would be able to automate this).

4 Member Management (currently 'Your Member Account')(Appendix A)

4.1 My Account

4.1.1 Personal Profile (appendix B)

All users can view / edit their own personal details eg. name, job title, address, telephone, email address, mailing preferences and mailing areas of interest.

In additional Full members can also select to display their details in the members area of the website, display certification in members area (different coloured stars denote certification in different tests) (Note: we no longer require the option to display certification on event delegate list, therefore is not required in future event reports)

4.1.2 List of Company Contacts

Any Full Member or Corporate Certified Non-Member Administrator or Main Contact users can view a list of all members belonging to their organisation. They can edit / delete any user within this list. Deleted users are changed to lapsed in the database.

BHBIA Administrators can view a list of all members belonging to any organisation and amend / delete records.

4.1.3 Test Results

Full Members and Certified Non-Members users can view all online training tests past and present that they have passed, showing expiry date and function to download certificates for each.

4.1.4 Your Jobs / Your Events / BOBI Awards

All users can view what jobs they have submitted, their event / course / webinar bookings and BOBI entries under separate tabs within My Account.

4.1.5 Yours News Articles / Your Journal Submissions / Guidelines Queries

All Full members can also view details of any news, journal and guideline query submissions made through the website including responses to guidelines queries.

5 Payments

5.1 Request a Quote

Any user may request a PDF quote for any BHBIA service/activity. This will assist organisations where they require a quote prior to be able to raise a purchase order. An automated email about the BHBIA service being purchased will include these details for the BHBIA Administrator to send a quote.

5.2 Online Payment (Credit Card)

Any user may make a credit card payment for any BHBIA service/activity.
https://www.bhbia.org.uk/makeapayment.aspx If logged in, the user's details will be pulled through to this page, with only invoice number, description and amount (excluding VAT) requiring completion. If not logged in all fields can be manually completed. Make a payment button at the bottom, goes through to sage pay where credit card payment is taken, based on information completed in the form.

BHBIA Administrator will receive an automated payment email from the website and from sage pay confirming the details / payment made. If the payment is for membership, the record will need to be ticked as paid in the database (see application section)

5.3 Payment by Invoice

Any user may request a PDF invoice for any BHBIA service/activity. An automated email about the BHBIA service being purchased will include these details for the BHBIA Administrator to send an invoice.

6 Members Contacts Directory (appendix C)

Full Member Users may access the Members Contacts Directory, which may be filtered by various criteria - including 'Pharma Companies', 'Agencies and Consultancies', 'Affiliate Members - Pharma Companies', 'Affiliate Members - Agencies and Consultancies' and 'Personal Members' and by 'areas of expertise'. The Members Contact Directory includes (if select to be shown) all Company contact information, including company logo and full member users, who have selected for their details to be shown ie. name, job title and email address.

Full Members' Administrator and Main Contact users can administer their company's entry within the Members Contacts Directory.

7 List of Member Companies

Anonymous Users may access the List of Member Companies. This is a limited list where member organisations have elected to be visible to anonymous users, showing only their company name / website address. https://www.bhbia.org.uk/membersdirectory.aspx

Full Member Administrators or Main Contact Users may elect whether their organisation's details should be visible to anonymous users via the List of Member Companies.

8 Online Training

8.1 *Online Training Slides (appendix D)*

Anonymous Users can view summary details of the available training courses (https://training.bhbia.org.uk/) and depending on access rights set up (see BHBIA Administrator below) can also view public training modules by viewing slides and progress through them by clicking 'Next' and 'Back'

Full Member Users & Certified Non-Member Users can view the summary details of the available training courses, view public training modules but must be directed to be logged in, before viewing slides of limited access modules. These users can progress through the slides by clicking 'Next' and 'Back' and if they end studying the training module part way through and then go to the course again it will start them off from the place where they left off. Slides include hyperlinks to pop up images of extracts from the relevant guidelines. Anyone who has already viewed a given set of slides once, will see a button during slide view to 'start test' (see F4) depending on whether they have accessibility to the tests, according to their membership type.

BHBIA Administrator can add new training courses to the website (slides), add/delete/change slides within a current course and be able to set accessibility options ie. public, Registered Users, Full Members & Certified Non-Members.

8.2 *Online Training Competency Tests (appendix E, F, G)*

Anonymous Users will be directed to the membership options if they wish to take the online test and receive a certificate of competency

Full Members & Certified non-members are able to take any online training tests, but must be logged in. These users will receive an automated email with link to online certificate, which can be downloaded, if they pass the test with a score of 100%. Current and past certificates are held within their account. After answering each question the next page will confirm whether the answer is correct / incorrect providing reasons / information. If incorrect the user has the option to take the test again (there are no limits on how many times the test is taken) or continue the test. All users must go through the slides prior to taking the test, on their first visit to the training, but on subsequent visits have the option to view the slides / jump to taking the test. Functionality will be available to allow an override of the system so that everyone has to view the slides before accessing the test, even if they have previously seen them, in case of significant updates being made to the content.

Test questions are presented to users in a random order

BHBIA Administrator can set up new competency tests at any time, which are accessed by Full members and certified non-members. Tests can include multiple and single answer questions. Ideally, it should be possible to create tests with more than the required questions to pass the test and questions are selected at random from the bank of options. (Currently a fixed selection is chosen from the question bank, for each test).

BHBIA administrators can also add additional questions to a current test, creating the details for the correct / incorrect answer.

9 Training Courses & Webinars

9.1 *Overview*

Training Courses are available for anyone to book with members / non-member rates but only Full members can attend webinars.

9.2 *Viewing of Training Courses & Webinars*

Anonymous, registered users, full members and certified non-members can easily view up and coming training courses and webinars. Users can search by year, month and category eg. Foundation, one-day workshop, Ethics & Guidelines and webinars (https://www.bhbia.org.uk/trainingcourses/trainingcourses.aspx) These users can also view past training course & webinars, searchable as above.

BHBIA Administrators can add new training courses & webinars. Training Courses and webinars are classed as events in the administration site and BHBIA administrators can select various options to be bookable online, pay online, category of event and different ticket types, limiting attendees by agency / pharma / registered users. As an automated process training courses / webinars that have a date which has expired will automatically be located under past training courses / webinars. The training page should show the year, as well as the date of each course/webinar. (appendix K)

An archive function is available so that past training courses / events (section 10.1) can be moved into the archive folders to make the CMS menu more manageable. Currently this creates a new url for the event, with an archive prefix, which requires extra administration to update links to child pages of archived events, or change links from other pages/documents. It would be desirable if courses could be archived but keep the same url. (This also applies to Events)

9.3 *Booking of Training Courses & Webinars (appendix H)*

Anonymous users can register to book for any training Course at a non-member rate.

Registered users and certified non-members can log in to book for any training course at a non-member rate by completing the event registration form and making a payment. They can also register additional users and make up to 10 bookings for a course at any one time. Once booked, an automated email will be received confirming the booking. The booking will also be shown in 'Your member account' for each person booked.

Full member users can log in and book any training course at preferential member's rates and book to attend webinars (free of charge). As a Full member they can book themselves and/or colleagues to attend a training course/webinar by selecting pre-registered members at their company from a drop down list or registering additional users. Full members have the option to request an invoice, quote or pay online. If requesting an invoice a purchase order number must be provided. Once booked, an automated email will be received confirming the booking. The booking will also be shown in 'Your member account' for each person booked.

If a training course / webinar has reached maximum numbers, bookings are placed on a waiting list and automated email is sent to the user to confirm this.

BHBIA Administrator User receives an automated email when any user books for a training course or webinar. BHBIA administrators can view online a report (appendix I) showing all users booked for a specific classroom / webinar training or extract the report as an excel spreadsheet (appendix J). BHBIA Administrators can also move bookings from the waiting list onto the actual bookings report and user will receive an automated email to confirm this.

10 Events

10.1 *Viewing of Events*

Anonymous, registered users, full members and certified non-members can easily view up and coming events. Users can search by year, months, categories eg. Conference, social events, members exchange forum, Summer Evening Events, Winter Seminar. https://www.bhbia.org.uk/events/eventscalendar.aspx These users can also view past events, searchable as above.

BHBIA Administrator can easily add events via an easy to use and flexible template (template also used for Training Courses / webinars). Events can be set up to specify attendees allowed ie. members only, registered users and numbers of agency / pharma attendees allowed. The event is also set up by type of event from a selection box and can either have a single date or start / end dates. As an automated process events that have an event date which has expired will automatically be located under past events. Each event can have unlimited ticket types / prices and show members / non-members rates. The event page should show the year, as well as the date of each event. (appendix K)

10.2 *Event Registration*

Anonymous users can register to book for specific events open to non-members. Registered users and certified non-members can also book for non-member events by completing the online form and making payment.

Full members can log in and book events at a preferential member rate. As a Full member they can book themselves and/or colleagues to attend an event by selecting pre-registered members at their company from a drop down list or registering additional users. Full members have the option to request an invoice, quote or pay online. If requesting an invoice a purchase order number must be provided. An automated event registration email is sent to the person making the booking to confirm a booking has been made and to colleagues included on the booking. The booking will also be shown in 'Your member account.

If an event has reached maximum numbers, bookings are placed on a waiting list and automated email is sent to the user to confirm this.

BHBIA Administrator User receives an automated email when any user books for an event. BHBIA administrators can view online a report showing all users booked for a specific event or extract the report as an excel spreadsheet. BHBIA Administrators can also move bookings from the waiting list onto the actual bookings report and user will receive an automated email to confirm this.

For consideration: it may not be necessary to have separate Events and Training/Webinars sections going forward. Sometimes there is an arbitrary distinction between what is an Event and what is a Course and it may be simpler to combine into one Events section. This would also mean that members just have one calendar to view. All the booking functionality is the same for Events and Training/Webinars already.

11 Jobs

11.1 *Viewing Jobs*

All users can easily view current job opportunities - https://www.bhbia.org.uk/recruitment/currentvacancies.aspx

11.2 *Advertising / Posting of Jobs*

Registered & Certified non-member users can post jobs online, using the online form, for an appropriate charge and make payment. Any posted jobs will be recorded in 'Your member account'

Full Members can post jobs online free of charge by completing the relevant form (appendix L) and will receive an automated email confirming if the job submission has been approved / declined.

BHBIA Administrator will receive a notification email when a job is posted online, which will require approval prior to going live on the website. If the BHBIA administrator declines a job advert, a message box for explanation appears for the BHBIA administrator to complete and this text is added to the decline email sent to the Full

Member user. BHBIA Administrators have access to edit any job advert content and will be able to view a report showing job postings.

12 Online Members News

12.1 *Viewing News*

There are two types of news – BHBIA & Members news and Pharma Times News. All users will be able to easily view a summary of all news items under both categories and view full details by clicking on the news item to read more. https://www.bhbia.org.uk/latestnews/news.aspx & https://www.bhbia.org.uk/latestnews/pharmatimes.aspx

All users will be able to access the news archive https://www.bhbia.org.uk/latestnews/newsarchive.aspx, which is searchable by year.

12.2 *Adding News*

Full members can add a Members News item free of charge, by completing the online form under 'Your member account' (appendix M) and any posted news items will show in their profile. An automated email will be received to confirm if the news item has been approved / declined.

BHBIA Administrator will receive a notification email when a news item is posted online, which will require approval prior to going live on the website. If the BHBIA administrator declines a news item, a message box for explanation, appears for the BHBIA administrator to complete and this text is added to the decline email. BHBIA administrator can edit any news item received, add additional news items themselves and will be able to view a report showing news postings.

13 BOBI Awards Sponsorship Application

Full members can indicate their interest in sponsoring a BOBI awards by completing an online application form and will receive an automated email confirmation. This will be recorded in ' Your member account'

BHBIA administrator will receive a notification email when a full members submits their interest to sponsor a BOBI award. The administrator can amend the online form fields / award categories to reflect those on offer. The BHBIA administrator will also be able to view a report showing all members that have submitted their interest.

This functionality is not currently available but would be useful to add. See further comments alongside the other BOBI awards forms - 15.6/7/8

14 Conference Call for Content Submission

Full member users can complete an online form to submit a conference call for content submission (appendix N) and this will be recorded in ' Your member account'. An automated email will be received to confirm the submission has been received.

BHBIA Administrator user will receive an automated email when a full member user completes a conference call for content submission and will be able to view online and extract into excel a report showing all submissions.

15 Variety of Web-Forms

The release of the initial website, using the 'Web-form Builder' system (see section 21.8), will include the following forms already implemented and up-and-running. The BHBIA administrator will be able to amend the fields in these forms and remove any forms from any menus (either permanently or temporarily) as required:

15.1 *Journal/Yearbook Request Form*

Full member users can complete an online form to request one or more hard copies of the BHBIA Journal / Yearbook (appendix O). If a member requests a copy it will be recorded against 'Your member account' and they will receive an automated email.

BHBIA administrator will receive an automated email when a member requests copies of the journal / yearbook.

15.2 *Journal/Yearbook Members News Contribution*

Full Member users can submit a news item, including images, for possible inclusion within the journal / yearbook (appendix P). If a member submits a news item it will be recorded against 'Your Member Account and they will receive an automated confirmation email.

BHBIA Administrator will be notified by email when a members news contribution is submitted and can view all submissions online / extract a report in excel showing all members news contributions / content / submission dates.

15.3 *Journal / Yearbook Features Contribution*

Full Member users can submit an industry related article, including up to 5 images for possible inclusion within the journal / yearbook (appendix Q). If a member submits an article it will be recorded against 'Your Member Account and they will receive an automated confirmation email.

BHBIA Administrator will be notified by email when an article is submitted and can view all features online / extract a report in excel showing all features / downloadable article / authors details / images / submission dates.

15.4 *Journal / Yearbook Advertising or Classified Listing*

Full members can book a journal / yearbook classified listing / advertising space for inclusion within the BHBIA journal / yearbook (appendix R).https://www.bhbia.org.uk/members/advertisingapplication.aspx Full members have the option to request an invoice, quote or be directed to paying online. If a member book a classified listing / advertising space it will be recorded against 'Your Member Account and they will receive an automated confirmation email.

BHBIA Administrator will be notified by email when a classified listing / advertising space has been booked and can view all bookings online / extract a booking report in excel.

15.5 *Guidelines Query*

Full members can log in and submit a guidelines query through the Guidelines Query form. The form also allows them to upload associated files (appendix S). If a member submits a guidelines query it and the response will be recorded against 'Your Member Account and they will receive an automated confirmation email.

BHBIA Administrator will receive an automated email when a guidelines query has been submitted and they can type a response to the query through the website, by clicking respond and the response will be automatically emailed to the member and held in 'Your member account'. The system will add automated disclaimers / sign off to the email, which can also be amended by the BHBIA administrator. BHBIA Administrators can view a full list of queries submitted and easily see if they have been replied to / showing date & time of reply.

15.6 *BOBI Award Entry – Panel Judged Awards*

Full members can log in and complete an entry form to enter the Panel Judged Awards (appendix T). The form must have options to upload entries, select award category and complete entry details.

BHBIA Administrator will receive an automated email when a member submits an entry and can view / export to excel all entries submitted and the user also receives a confirmation form which can be content managed

15.7 *BOBI Award Entry – Best Newcomer*

Full members can log in and complete an entry form to enter the Best Newcomer Award (appendix U). The form must have options to upload entries, select award category and complete entry details.

BHBIA Administrator will receive an automated email when a member submits an entry and can view / export to excel all entries submitted and the user also receives a confirmation form which can be content managed

15.8 *BOBI Award Company of the Year Awards Entry Form*

Full members can log in and complete an entry form to enter the Company of the Year Awards (appendix V). The form must have options to upload entries, select award category and complete entry details.

BHBIA Administrator will receive an automated email when a member submits an entry and can view / export to excel all entries submitted and the user also receives a confirmation form which can be content managed

15.9 *New BOBI Forms*

The above forms are examples of those currently required, but the exact mix of awards changes each year and the preferred solution would be a flexible form builder (see section 21.8) that could be used to create new entry forms as required. (And with the ability to also create the associated email confirmations (site user and BHBIA administrator) and reports) The form would need to include the following options which could be included – or not – as required:

- Category choice (option to add a drop-down menu to select category from options for that award type)

- Main contact/entrant details

- Other entrants' details

- Other text fields – e.g. for supporting information

- Declaration/consent tick boxes

- Upload fields

15.10 *Newsletter Sign-Up for Non-Members*

This simple form is for non-members to complete first name, surname, company name and email address to keep up to date with the latest news, events and information about BHBIA. Anyone completing the form will be added to the email system to receive BHBIA updates. Additional options should be flagged when they click on the button – e.g. 'why not join as a registered user to get access to online training resources and allow you to book for events/submit forms?' or 'Is your organisation already a member? If so click here to join your company's existing membership and get access to additional website content and member benefits'.

16 Content Management

Overall BHBIA Administrators must have flexibility to manage the site content. All text should be editable by BHBIA administrators, including user instructions.

16.1 *Add Content Pages*

BHBIA Administrator users can add content pages on the website by selecting the appropriate content type and benefit from the optional use of a WYSIWYG editor.

16.2 *Edit Content Pages*

BHBIA Administrator can edit all content pages on the website and benefit from the optional use of a WYSIWYG editor.

16.3 *Clone Content Pages*

BHBIA Administrator can clone an existing content page and use it for the base of a new content page.

16.4 *Delete Content Pages*

BHBIA Administrator can delete content pages on the website.

16.5 *Content Types*

BHBIA Administrators will have a variety of content types available to assist with adding various types of page content. These will include:

- Standard Page / Generic
- Committee Members (example - https://www.bhbia.org.uk/aboutthebhbia/board.aspx)

- Event (used for events / training courses / webinars – example https://www.bhbia.org.uk/trainingcourses/trainingcourses/introtopharma2017.aspx)
- Job (example - https://www.bhbia.org.uk/recruitment/currentvacancies/researchdirectoroncologypermanent.aspx
- Organisation
- Profile
- FAQ – title page and child pages with individual FAQs

16.6 *Display of multi-content entries on a single web page (Views)*

BHBIA Administrators can administer multi-content entries on a single web page. For example, Jobs and News items may be easily entered via templates which will consist of various fields. An example of multi-content entries on a single web page is that of a news listing. It may show news title, news date and news teaser from multiple content entries on a single page linking to individual news pages with full stories.

16.7 *Menu System*

The BHBIA Administrator can amend the location of pages within the website through an easy-to-use menu system. Pages can be added, removed or hidden in the main menu and also under 'Your Member Account'. Navigation needs to be clear, easy to read and clearly labelled to improve visitor experience.

16.8 *Roles, Permissions and Functionality*

BHBIA Administrator will have the ability to work with roles, permissions and functionality. Roles are used to hold assignment of functionality which can then be allocated to users. Users may be allocated multiple Roles. For example, the role of 'Anonymous User' will have certain functionality or privileges and is the default for all users. The role of registered user is automatically assigned to a registered user and gives additional privileges. BHBIA Administrator will also have the ability to tag pages to restrict access to attendees of a specific event eg. Conference 2017 delegates – attendees will be tagged so they are the only members with access to conference 2017 content /pages

16.9 *Work-flow*

BHBIA Administrator User - The system is to provide the facility of work-flow for a certain number of pre specified tasks – such as the approval of members. The system should allow for additional work flow to be set-up.

16.10 *Version Control for Content*

BHBIA Administrator User - The system should have the facility to provide version control of authored content.

16.11 *Captcha*

When completing a form, anonymous users will be required to complete a captcha challenge and thereby reduce the spam received by BHBIA.

16.12 *Search website*

All users may search the website by entering keywords within a search box located on all pages of the website.

BHBIA Administrator may access a report that shows the terms that have been used by users of the website.

16.13 *Blocks in left and right hand columns*

Anonymous & Registered users can view blocks of content in the columns which have been assigned by the BHBIA Administrator for access by 'Anonymous users' / ' Registered Users'.

Full members can view blocks of content in the columns which have been assigned by the BHBIA Administrator for access by 'Full Member Users'.

BHBIA administrator can easily add blocks that will be displayed in various regions of the website. They can also access permission levels so that they are only accessible to users of appropriate role and easily configure blocks to appear of specific pages only.

16.14 *RSS Feeds*

The website will provide the ability to set-up RSS feeds. Such as RSS News feeds – see PharmaTimes News section

16.15 *Home Page Specific Content Management Requirements*

The key requirements are for:

- a fresh, modern feel both visually and in terms of the language used (more friendly)
- simpler menu structure/improved navigation to all key areas of the site
- clearly at first glance show what the BHBIA is/does

The following items are key for website users to be able to find easily at all times and therefore warrant dedicated space on the home page at all times, in addition to being in the menu, with editable text to feature latest news/updates:

- Online training and certification
- Guidelines
- Training and Events – potentially with dynamic rotating advert blocks so that several events can be featured
- How to join / register / log in

It would also be good to have fully flexible editable 'news block' options that could be used for different topics as the need arises – e.g. BOBI Awards, Call for conference papers, Journal contributions etc. need to be prominent at certain times of the year but don't need to be visible at all at other times

Live twitter feed to appear on home page (possibly a dynamic field with rotation around the last 3 tweets), and also the latest news feed as at present

17 Database Management

BHBIA Administrators can manage all user / organisation records in the database, by editing / deleting / amending / adding new users and organisations. BHBIA Administrators can see easily whether users have logged in, been approved, company has been lapsed and if the company has paid. BHBIA Administrators can search user by first name, surname or organisation.

18 Migration of data/Information from legacy website

There must be an automated process to upload the Member Organisations with the 'Organisation' content type, all current information, historic information and allocate a unique reference number for each organisation.

There must be an automated process to upload all users, including profile, contact details, email, profile information, tags, current / past certificates and link them to the correct Member Organisation where appropriate. Each Full Member and Certified non-member contact should be allocated a unique membership number.

There are approx. 450 organisations and 11,000 user records in the current database.

Proposals must also include the migration of all page information / files / images from the current website.

19 Mass Emailing

The system will have a dynamic template, with colour palette / style that can be amended to match the relevant activities / BHBIA Committees. BHBIA administrator will be able to be able to create an email, preview and save for subsequent sending. BHBIA Administrator can create a group of users based on profile criteria and send emails to groups. The emailing system contacts will be updated automatically to match the database of contacts in the website. The system should also have a report function, where BHBIA Administrators can view email statistics eg. bounce backs / opens etc.

20 Reports

Anonymous User, registered users and Certified Non-members can access a variety of non-member reports.

Full members can access a variety of member's reports.

BHBIA administrator can access a variety of pre-built BHBIA Administrator reports and also configure their own reports using a report generator (see new functionality).

Pages on the website should also have an analysis functions such as Google Analytics to enable the BHBIA to monitor / analyse traffic to / from and around the website.

21 New Functionality

21.1 *Event / Training Courses / Webinar Confirmations*

BHBIA Administrators should be able to create tailored confirmation emails for events / training courses / webinars, to be sent at the time of booking to all those attending, not just the person booking. It should also be possible to also create updated confirmation/event details at later dates and send these to attendees and bookers

21.2 *Event / Training Course Early Bird Rates*

Early bird rates are relevant for some training courses / webinars and the system should have an option to enter an early bird rate / deadline date, with the system automatically changing back to full rates after that date.

21.3 *Additional Online Training Functionality*

Ability to add tests that do follow the usual rules but also ideally a range of different permutations would be available – e.g. pass marks other than 100%, one-off certification (rather than entering the cycle of annual updates). Ability to add a new payment gateway – i.e. the option to charge users to view slides/take tests, with different options depending on user types, and this would need to link to additional access permutations – e.g. even non-members being able to take tests, if they had paid.

21.4 *Additional Database Functionality*

Improved flexibility to enable BHBIA Administrators to add additional fields to the database to collect information at company and individual level such as segment the company structure and collect additional preferences from individuals. This may also include the option to add free text – e.g. a description of the company's services – that could be displayed in the members directory.

21.5 *Improved Time out notification*

Clearly show when users have timed out

21.6 *Improved upload functionality*

For any forms, where the upload of information/documents is required, clearly state file formats accepted, size and state if form rejected due to file upload issue.

21.7 *Improve Member Paid Communications to Users*

Show clearly to users taking online certification if their organisation has paid. Clearly state on certification records organisation renewal status – renewal year / paid or unpaid.

21.8 *Automated User Tagging*

The system could automatically tag user when booked to attend an event, training course or webinar. The event page will include a tag field, which will be automatically be added to the users profile when a person books to attend an event. BHBIA Administrator can automatically amend tags as required on users records. This could also include an option for social sharing to linkedin or twitter

(NB. It would also be useful to explore more generally where there can be any link up between activity on the site and the BHBIA Company LinkedIn page. For example, if someone shares that they have booked for an event could these feed through to an update on the company page, or similarly could an event testimonial – see 21.17 below feed through to the page.

21.9 *Web-Form Builder*

The system is to provide the BHBIA Administrator with a web-form builder. This functionality should enable various forms to be built and implemented without the need for HTML/programming expertise. The BHBIA Administrator will be able to easily view submissions made and also download submissions for use within likes of MS Excel. The BHBIA administrator will be able to create their own forms with fields as required and will be able to place them in pages or within the menu / 'Your member account' system. The BHBIA Administrator will be able to view web forms that have been submitted and be able to specify an email address or email addresses where the form will automatically be sent when submitted by a user.

In the event that an implemented form is submitted by a user the user account and member organisation accounts will be updated to record the submission of the form.

Depending on functionality, this may also incorporate Survey functionality – see section 21.16

21.10 *Report Builder*

The system is to provide the BHBIA Administrator with a report builder. This functionality should enable various reports to be built and saved in the system. The system should enable reports to be pulled to include some all categories of members/non-members and users and by type eg. agency / pharma. The system should also allow reports to be pulled to show organisations who don't have key roles eg. Organisations with no main contacts. The report builder should allow all fields to be select including certification status on any active tests, option to download certificates from report, tags and all fields used for each user / organisation,

21.11 *'Pop-ups'*

Option to have pop-up messages appear when members access different parts of the site – e.g. when someone clicks on a guidelines page: "Have you considered attending our guidelines training course?"

21.12 *Visibility of additional content*

It would be useful if users could see what additional content would be available to them if they joined/logged in – e.g. it has been suggested that items currently not available could be displayed as 'greyed out' lines within a menu. Currently users don't always log in because they do not realise what else would be available to them. This may also help with encouraging non members to join, to access the additional content.

21.13 *File Access Permissions*

Enhanced permission options for viewing/downloading files – i.e. BHBIA administrators should be able to classify by specific member type who can view (currently this is only possible for web pages)

21.14 *Banner Advertising*

The option to have one or more advertisement blocks so that members could be charged to post content.

21.15 *Secure Sharing Platform*

A platform that would allow selected members to upload and share materials in a secure section of the site (an alternative to dropbox, about which some security concerns have been expressed). This might be used for BOBI awards materials development, Ethics and guidelines, or Board matters for example. Would need options to define permissions – down to individual level (i.e. tagged individuals) as well as by member type, with permutations such as 'view only' or 'upload and view' (ideally also to include the possibility of making changes within the document).

21.16 *Survey Functionality*

Option for BHBIA administrators to create simple polls within the system (similar to online survey tools) so that members could input responses and their personal details would be captured automatically (but with the option to offer an opt out of recording personal details where required).

21.17 *Event Testimonials / Reviews*

Show event testimonials / reviews submitted through the website (would need to be approved in the CMS before being made live manually)

21.18 *Social Media Sharing*

Option for BHBIA administrators to add buttons (key ones being Twitter and LinkedIn) to specific pages as required – e.g. events

21.19 *Conference / BHBIA App*

Production of a BHBIA or conference specific App for BHBIA administrators to manage content.

22 Appendix

A Your Member Account

B Edit Personal Details

Edit Personal Details

Mailing preferences: please do not select 'no messages' unless you are sure you do not want to receive any communications from us, as you could miss important information (such as changes in guidance) if you opt out.

Mailing areas of interest: you can select market research, analytics or both.

Changing your company: if you are moving/have moved to a new company you will need to find out the new company's Organisation Member Number so that you can change this below. Your new company will then receive an email asking them to confirm you as a member, following which your record will be transferred.

Please update your details below.

Field	Value
Organisation Member Number:*	8N2GRIRI
Forename:*	Tina
Surname:*	Clayton
Job Title:*	.
Address 1:*	177 Outfield Crescent
Address 2:	
Address 3:	
Town/City:*	Wokingham
Postcode:*	RG40 2ET
County/State:	
State:*	Please select ▼
Country:*	United Kingdom ▼
Telephone:*	07876 543782
Email Address:*	admin@bhbia.org.uk
Confirm Email:*	
Key Areas:*	Qualitative Research ×
General:*	Telephone Research ×
Mailing Preferences:*	Email and Hard Copy ▼
Mailing Areas Of Interest	Please select

You can select a max of 5 key areas

You can select as many general areas of expertise as are required.

Display details in members area of the BHBIA website? ☑

Display Certification in members area ☑

Display Certification on event delegate lists ☐

* Denotes mandatory field

Submit ▶

C Members Directory – visible by all Full Members

BHBIA @BHBIAssociation
Last chance to book for Friday's "Case-studies in Patient Research" webinar with @Kantar_Health - https://t.co/tKDymatNxH

Search ›

Make a Payment ›

Welcome, Tina Clayton

Your Member Account ›

🏠 Members Area ⟩ Members Directory ⟩ MembersDetail

Home
About the BHBIA ▸
Join the BHBIA ▸
Members Directory
Online Training/Tests
Training/Webinars ▸
BOBI Awards ▸
Events ▸
Guidelines ▸
Latest News ▸
Resources ▸
Jobs and Careers ▸
Contact the BHBIA
Make A Payment

BHBIA Updates
▸ Sign Up Now!

Member Directory
▸ Visit Member Directory

‹ Back to Members Directory

Aline Rogers

Address
177 Outfield Crescent
Wokingham
RG40 2ET

Telephone 07876 543782

Logo displayed here

Area of expertise
Qualitative Research, Telephone Research

Main Contact

| Aline Rogers★★ | Personal BHBIA Member | T: 07876 543782 |
| | | Email Aline |

Key: ★ Adverse Event Guidelines Certified ★ Legal & Ethical Guidelines Certified

If members have opted out of displaying certification, stars won't be visible even if certified.

e: admin@bhbia.org.uk
t: 01727 896085

SHARE

Site Map | Terms Of Use | Cookie Policy | Privacy Statement
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D F4 - Online Training Slide view

E Online Training Test Questions

F Online Training – Correct Answer

G   Online Training – Incorrect Answer

LEGAL AND ETHICAL GUIDELINES – FOR MARKET RESEARCHERS

1 Study the course material   2 Take the test   3 Your results

Question 2 of 20

❌ Sorry, that is incorrect!

The correct answer(s) are:
Design of market research
Execution of market research
Market research commissioned by a Brand Team (not by a Market Researcher)
Storage of market research
Use of market research

The BHBIA Guidelines cover all aspects of market research, from design right through to storage. Research commissioned by a brand team is also correct because the BHBIA Guidelines cover any market research carried out by the member company irrespective of the role or department of the commissioning individual, e.g. market research commissioned by Marketing or Competitive Intelligence would be covered, even if it is not titled market research. Market research is defined by the objectives and the approach, not by the title of the work or the role of those commissioning the work.

DO NOT USE YOUR BROWSER'S BACK BUTTON   TAKE THE TEST AGAIN ›   CONTINUE TEST ›

H   Registered users – Classroom Training Booking form

Join the BHBIA
Members Directory
Online Training/Tests
Training/Webinars ▶
BOBI Awards
Events
Guidelines
Latest News
Resources
Jobs and Careers
Contact the BHBIA
Make A Payment

BHBIA Updates
▶ Sign Up Now!

Member Directory
▶ Visit Member Directory

Introduction to the Pharmaceutical Industry and Business Intelligence Practice

SEPT 21

AbbVie Ltd, AbbVie House, Vanwall Business Park, Vanwall Road, Maidenhead, Berkshire SL6 4UB
9:00 AM - 5:00 PM

Ticket Prices (excluding VAT)

Ticket Type	Member	Non-Member
Standard Ticket - standard terms and conditions apply	£275	£375

No. of places:	2 ▼

Please add details for each attendee below. If an attendee is not currently listed as a member of your organisation please add them as either a registered user or member user using the links below

▶ **Add Registered User**

Attendee 1:*   Please select ▼
Ticket Type:*   Please select ▼
Attendee 1 comments / Dietary requirements:

Attendee 2:*   Please select ▼
Ticket Type:*   Please select ▼
Attendee 2 comments / Dietary requirements:

Consent for use of images, video and sound recordings containing personal data

Booking for this event assumes that:

- I give permission to BHBIA for photographs/video/sound recordings of me to be captured and used in printed and electronic media, including the internet, for promotional purposes.
- I understand that some images or recordings may be selected for permanent preservation in the BHBIA archives and may be used for publication, broadcasting, public performance, displays and exhibitions.

If you do not consent to this please inform the organisers by email (admin@bhbia.org.uk) prior to the event and we will ensure that your image is not identifiable in any footage that we publish.

Cancellation Policy: Cancellations of bookings can only be accepted in writing to the BHBIA, Ground Floor, 4 Victoria Square, St. Albans, Hertfordshire, AL1 3TF. or by email to admin@bhbia.org.uk Full refunds can only be given against a booking if written cancellation is received four weeks prior to the event. After this time, no refunds will be given, however a substitute delegate can be accepted.

* Denotes mandatory field   **Register for Event ▶**

MRS 6 hours CPD

Related Links
▶ MRS CPD accreditation details

Downloads
▶ Full 2017 Learning and Development Programme - PDF (549.5kb)

I   BHBIA administrator – Classroom / Webinar booking report

Name	Company	Delegate Count	Payment Type	Cost	Paid	Booked On
Aline Rogers	Aline Rogers	1	Invoiced	£247.00	✗	17/11/16 12:25:23 PM
		1	Online	£247.00	✓	07/03/17 04:07:15 PM
		2	Invoiced	£494.00	✗	12/07/17 06:32:51 PM
		1	Online	£247.00	✗	14/07/17 02:55:21 PM
		2	Online	£494.00	✓	17/07/17 05:04:10 PM
		3	Online	£741.00	✗	27/07/17 04:15:10 PM
		1	Online	£275.00	✓	08/08/17 11:47:24 AM
		1	Invoiced	£275.00	✗	15/08/17 03:33:17 PM
		1	Invoiced	£275.00	✗	23/08/17 01:55:53 PM
		1	Online	£375.00	✓	29/08/17 09:33:58 AM

J   BHBIA administrator – Classroom / webinar booking exported report

Introduction to the Pharmaceutical Industry and Business Intelligence Practice

Full Name	Forename	Surname	Show Stars	Organisation Name	Membership Type	Organisation Type	Address 1	Address 2	Address 3	Town/City	Postcode	Country	Telephone	Email Address	Comments/Diet	Ticket Type	Ticket Price	Payment method	PO number	Paid	(booked by) Forename	(booked by) Surname	(booked by) Organisation	(booked by) Email	(booked by) Telephone	Booked on (date)
Aline Rogers	Aline	Rogers		Aline Rogers	Personal Member	Agency	125 BHBIA Lane			BHBIA		United Kingdom	01727 896085	admin@bhbia.org.uk		Intro to Pharma - 2017	247	invoiced	na	No	Aline	Rogers	Aline Rogers	admin@bhbia.org.uk	01727 896085	17-Nov-16

K   BHBIA Administrator – Event/ Training Course / Webinar Set up options

Training Modules | Guideline Queries | Membership ▾ | Approvals ▾ | Email Notifications | Reporting ▾ | Contact Database

Welcome | 👤 Users ✕ | 📅 Event Delegates ✕ | 📄 **Introduction to UK Pharma Forecasting - 2017** ✕

Generic Page Information | Main Column | Right Column | **Event Details**

Details

Title: | Introduction to UK Pharma Forecasting

Date From: | 29/06/2017

Time From: | 9:00 AM

Date To: | 29/06/2017

Time To: | 5:00 PM

Categories:
- ☐ Conference
- ☐ Social Events
- ☐ Members' Exchange Forum
- ☐ Summer Evening Events
- ☐ Winter Seminars
- ☐ 'Staying Connected' Evening Forums
- ☐ Foundation Training
- ☑ One-Day Workshops
- ☐ Ethics and Guidelines Training
- ☐ Webinars

Location: | Hamilton House, Mabledon Place, London WC1H 9BD

Short Description: | A practical guide to the basics of forecasting for entry to intermediate-level researchers and Business Intelligence executives who wish to learn more about the process of forecasting when monitoring sales performance or in successful product launches.

Event Type: | Open Event

Book Online: ☑

Pay Online?: ☑

Ticket Details

📄 Add New Row | ⬆ Move Up | ⬇ Move Down | Delete Row

	Type	Member Price	Non-Member P...	Agency Max	Industry M...	Registered...	
1	Standard ticket ...	449	549	82	82	97	

Agency Limit: | 20

Industry Limit: | 20

Registered User Limit: | 20

L Add job Form

BHBIA @BHBIAssociation
Last chance to book for Friday's "Case-studies in Patient Research" webinar with @Kantar_Health - https://t.co/tKDymatNxH

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🏠 〉 Members Area 〉 Add A Job 〉

Home
About the BHBIA ›
Join the BHBIA ›
Members Directory
Online Training/Tests
Training/Webinars ›
BOBI Awards ›
Events ›
Guidelines ›
Latest News ›
Resources ›
Jobs and Careers ›
Contact the BHBIA
Make A Payment

BHBIA Updates
› Sign Up Now!

Member Directory
› Visit Member Directory

Add A Job

Job adverts are FREE OF CHARGE for BHBIA members. The cost for non-members is £450 +VAT per calendar month.

Please enter information for your job opportunity below

Job Title:*

Location:*

Salary & Benefits:

Date Posted:*

Website address:

Email Address for applications/enquiries:*

Job Description:*

How to Apply:*

Image:
(Max size 1mb/
JPG, PNG, GIF)

Choose File   No file chosen

No. months required:*

Please Select ▼

* Denotes mandatory field

Submit ›

M Online Members News Form

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Make a Payment ▸

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Home

About the BHBIA ▸

Join the BHBIA ▸

Members Directory

Online Training/Tests

Training/Webinars ▸

BOBI Awards ▸

Events ▸

Guidelines ▸

Latest News ▸

Resources ▸

Jobs and Careers ▸

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Make A Payment

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Online Members News Item

Submit an item for the BHBIA website 'Latest News' column. This new feature of our website allows you to post up-to-the minute news about your company

Do you have any news about people in your company that would be of interest to BHBIA members - for example New Starters? Promotions? Retirements?

If so, please complete the form below to send us a short paragraph on your company announcement. If you like you can also upload a photo or other visual (separate JPEG, EPS or PDF file).

News items should not promote a particular product or service or include contact details. The BHBIA reserve the right to decline or edit news items.

Please note that news items are displayed in the public area of the site, so are visible to all website users. We will still be including members' news in the Journal and Yearbook so if you have an annoucement that you only want to make available to BHBIA members and/or if you want to see your news in print, please submit a **'Journal News Item'** instead.

Please enter your information for your news story below

News Article Title:*

News Article Date:*

Introductory line:*

Maximum 100 words

Remainder of news article copy:*

Image:
(Max size 1mb/
JPG, PNG, GIF)

Choose File   No file chosen

* Denotes mandatory field

Submit ▸

N Conference Call for Content Form

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Search ›

🏠 Members Area › Conference Content

Menu

- Home
- About the BHBIA ›
- Join the BHBIA ›
- Members Directory
- Online Training/Tests
- Training/Webinars ›
- BOBI Awards ›
- Events ›
- Guidelines ›
- Latest News ›
- Resources ›
- Jobs and Careers ›
- Contact the BHBIA
- Make A Payment

BHBIA Updates
› Sign Up Now!

Member Directory
› Visit Member Directory

Conference Content

The BHBIA look forward to receiving your submissions. We're looking for sessions that will make an impact when shared with your peers at the 2018 Annual Conference - either on the main stage or in a syndicate session.

Please enter information for your conference submission below

Title of Submission:* [   ]

Format:* [   ]

Length of Session:* [Please select ▼]

Presenter(s) / Facilitator(s)

Person 1

Name:* [   ]

Company Name:* [   ]

Email:* [   ]

CV: [Choose File] No file chosen

[Add Another Presenter / Facilitator ›]

[Remove Presenter / Facilitator ›]

Session Detail

Session Overview and Objectives:* [   ]
Maximum 150 words

Relationship to theme:* [   ]
Maximum 75 words

3 key messages / outcomes for delegates:* [   ]
Maximum 75 words

Brief summary for Conference programme:* [   ]
50 Words Minimum - 75 maximum

Technology requirements: [   ]
Maximum 150 words

* Denotes mandatory field

[Submit ›]

O Journal Request Form

Journal Request

The Journal/Yearbook is only available to full BHBIA members. All requests are subject to availability and cannot be guaranteed.

Please enter your journal request below

Number of copies required:*   Please Select ▾

* Denotes mandatory field   **Submit ▸**

P   Journal / Yearbook Members News Contribution Form

Home
About the BHBIA   ▸
Join the BHBIA   ▸
Members Directory
Online Training/Tests
Training/Webinars   ▸
BOBI Awards   ▸
Events   ▸
Guidelines   ▸
Latest News   ▸
Resources   ▸
Jobs and Careers   ▸
Contact the BHBIA
Make A Payment

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Member Directory
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Journal Members News Item

Use this form to submit a Members' News item for the:

BHBIA Journal - publication in September - submission deadline end July

BHBIA Yearbook - publication in March - submission deadline mid January

Members' News could include new starters, promotions, retirements or the opening of new premises.

Please note:

- **News items should not promote a particular product or service** or include contact details.
- **News should relate to member companies only**, not non-member affiliates (e.g. news of the opening of a new office outside the UK should only be submitted if the new office has joined the BHBIA as an Affiliate Member)
- News should be a maximum of 500 words in length
- We reserve right to edit or exclude news items that do not follow these guidelines.

Please consider the time lag between submission and publication. For news that will go out of date quickly you may prefer to submit an **online news item.**

Please enter your information for your journal story below

Journal News Title:*   [   ]

Journal News Date:*   [   ]

Journal News Copy:*   [   ]

Image 1:
(Max size 1mb)   [Choose File] No file chosen

Image 2:
(Max size 1mb)   [Choose File] No file chosen

Image 3:
(Max size 1mb)   [Choose File] No file chosen

Image 4:
(Max size 1mb)   [Choose File] No file chosen

Image 5:
(Max size 1mb)   [Choose File] No file chosen

* Denotes mandatory field   Submit ▸

Q   Journal / Yearbook Features Contribution Form

BHBIA @BHBIAssociation
Last chance to book for Friday's "Case-studies in Patient Research" webinar with @Kantar_Health - https://t.co/tKDymatNxH

Google
Search ▸   in

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Your Member Account   ▸

🏠 ⟩ Members Area ⟩ Features Contribution ⟩

Home
About the BHBIA   ▸
Join the BHBIA   ▸
Members Directory
Online Training/Tests
Training/Webinars   ▸
BOBI Awards   ▸
Events   ▸
Guidelines   ▸
Latest News   ▸
Resources   ▸
Jobs and Careers   ▸
Contact the BHBIA
Make A Payment

BHBIA Updates
▸ Sign Up Now!

Member Directory
▸ Visit Member Directory

Features Contribution

Use this form to submit a feature for the:

BHBIA Journal - publication in September - submission deadline end July

BHBIA Yearbook - publication in March - submission deadline mid January

We will be pleased to receive features on business intelligence or related topics that may be of interest to members and will consider these for inclusion.

Features will also be published in the online BHBIA & Member News pages at a later date, giving a second opportunity for exposure.

Please note:

- Features must not promote a particular product or service - either directly or indirectly - or include contact details
- They should be around 500-800 words in length (+visuals)
- Please remember to state the title of your article, authors' names, job titles and company names
- We reserve the right to exclude or edit features that do not meet these guidelines.

Please enter information for your feature below

Title:*

Authors:*
(Please include job titles and organisation names for each Author)

Feature document:*
(1mb max)   [Choose File] No file chosen

Image 1:
(Max size 1mb)   [Choose File] No file chosen

Image 2:
(Max size 1mb)   [Choose File] No file chosen

Image 3:
(Max size 1mb)   [Choose File] No file chosen

☑ Are you happy for your Journal feature to be reproduced in other BHBIA electronic or hard copy publications, which may include publicly accessible web pages?

* Denotes mandatory field   **Submit** ▸

R   Journal / Yearbook Advertising or Classified Listing Application

BHBIA @BHBIAssociation
Help your interns get up to speed on pharma & BI basics - one-day workshop 21st Sept: https://t.co/bgXUQJIbwR

Welcome, Tina Clayton
Your Member Account

Home > Members Area > Advertising or Classified Listing Application

Navigation menu:
- Home
- About the BHBIA
- Join the BHBIA
- Members Directory
- Online Training/Tests
- Training/Webinars
- BOBI Awards
- Events
- Guidelines
- Latest News
- Resources
- Jobs and Careers
- Contact the BHBIA
- Make A Payment

BHBIA Updates
- Sign Up Now!

Member Directory
- Visit Member Directory

‹ Back to Contribute to the Yearbook / Journal

Advertising or Classified Listing Application

There are several opportunities to advertise in the BHBIA's two printed publications - the Yearbook (March each year) and the Journal (September each year). Copies are mailed to key contacts in all Corporate and Personal BHBIA member companies. They are also available for all full members to download as PDFs.

Please select the type of advertising space you would like to book. **The cost of each item is £315+VAT.**

Half page landscape colour advert - Yearbook (deadline mid January for publication in March) OR Journal (deadline end July for publication in September). Advertising slots are limited and will be allocated on a first-come first-served basis. Please note that we will only be accepting general profile/agency services adverts, NOT recruitment adverts (for which you should use the website). Advert size must be: width 180mm x height 109mm and should be emailed to admin@bhbia.org.uk as a high res JPEG or print ready PDF file format.

Classified Listing - Yearbook only. This gives companies the opportunity to insert their logo and share details about their services. The full Members Contact Directory is now only available online, so a classified entry provides a unique opportunity for your details to appear in print.(deadline mid January for publication in March). You will need to complete a proforma with your organisation's details.

Download the proforma for a classfied listing (Yearbook only)

Advertising Space

I would like to book the following (subject to confirmation of available space):

[Please select ▼]

Payment Method:*	◉ I would like to be invoiced
	○ I would like to pay online
	○ I would like a quote

Purchase order number:*   [   ]

* Denotes mandatory field   Submit ▸

S Guidelines Query Form

T   BOBI Panel Judged Awards Entry Form

BOBI Awards Entry - Panel Judged Awards

Entry Deadline: 5pm on 31st January 2017

Please complete the details below. Please ensure that all names (including company names) are spelled correctly and written *exactly* as you would like them to appear in publicity if you are short-listed and on the trophy if you win.

Please ensure your entry is completed on the official 2016-17 Panel-Judged Entry Template, and upload it as a pdf file.

WHEN YOUR ENTRY HAS BEEN SUCCESSFULLY UPLOADED YOU WILL RECEIVE AN EMAIL CONFIRMATION. PLEASE KEEP THIS AS PROOF OF SUBMISSION. IF YOU DO NOT RECEIVE THE EMAIL PLEASE CONTACT US BEFORE THE DEADLINE HAS PASSED. SIMILARLY, IF YOU ARE HAVING ANY TROUBLE SUBMITTING YOUR ENTRY PLEASE CONTACT US BEFORE THE DEADLINE.

If you have not managed to obtain final sign-off, you may submit your entry by the deadline with the option to withdraw it within 2 business days - i.e. by 5pm on 2nd February - if approval is not obtained, by notifying us at: admin@bhbia.org.uk. Unless such specific notification has been received by us, all entries will go through to the judging process. Aside from the option to withdraw it, you cannot make any changes to your entry once it has been submitted.

Entry is free as long as at least one of the companies involved in your submission is a full BHBIA member. If not, you will need to pay an entry fee of £200+VAT (to do this please click on the 'make a payment' button - top right of screen)

Entry Details

Name of contact for correspondence:* _____

(does not necessarily have to be one of the entrants listed below)

Contact Email:* _____

Category Entered:* [Please select ▼]

Title of Entry:* _____

Name of product/therapy area (or state N/A if not therapy area specific):* _____

Names of Entrants

These names will be credited in publicity if you are short-listed and will appear on the trophy if you win. Please ensure that you spell names correctly and that company names are written precisely as you would like them to appear.

	Name:	Company Name:	Email:
Entrant 1			
Entrant 2			
Entrant 3			
Entrant 4			
Entrant 5			

Name of any other team members

Please list any other team members who played a supporting role and should be credited in the "small print" if your entry is successful.

	Name:	Company Name:	Email:
Team Member 1			
Team Member 2			
Team Member 3			

Organisations whose staff should not view your entry

If you wish to specify more than 3 organisations that should not view your entry, you can add multiple company names to each of the boxes (However please note that all entries are treated in the strictest confidence and all those involved sign a confidentiality undertaking).

Organisation 1: _____

Organisation 2: _____

Organisation 3: _____

Submission document:* (Max size 2mb) [Choose File] No file chosen

I Tina Clayton confirm that:

☐ All the entrants understand and agree to the conditions of entry* and understand that there is a maximum word count of 2,100 words (2,000 excluding the executive summary), a limit of 5 visuals/charts and that the BOBI Panel-Judged Awards Entry Template must be used.

☐ All the necessary permissions/approvals for submission of this entry have been obtained.*

☐ I have understood that all or part of the 100-word executive summary (but no other part of the submission) may be published, if the entry is short-listed.*

☐ All the entrants agree to their names and photographs appearing in BHBIA publications/the industry press if the entry is short-listed (photographs will be requested on short-listing) and also give consent for the use of photographs & video/sound recordings from the Awards Ceremony.*

* Denotes mandatory field   [Submit ▶]

Sidebar navigation:
Home
About the BHBIA ▶
Join the BHBIA ▶
Members Directory
Online Training/Tests
Training/Webinars ▶
BOBI Awards ▶
Events ▶
Guidelines ▶
Latest News ▶
Resources ▶
Jobs and Careers ▶
Contact the BHBIA
Make A Payment

BHBIA Updates
▶ Sign Up Now!

Member Directory
▶ Visit Member Directory

U BOBI Award Entry – Best Newcomer

Home
About the BHBIA ▶
Join the BHBIA ▶
Members Directory
Online Training/Tests
Training/Webinars ▶
BOBI Awards ▶
Events ▶
Guidelines ▶
Latest News ▶
Resources ▶
Jobs and Careers ▶
Contact the BHBIA
Make A Payment

BHBIA Updates
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BOBI Award Entry - Best Newcomer

Entry deadline: 16th December 2016

Competition Day: 21st April 2017

Eligibility:

To be eligible, entrants must have been working in roles that include business intelligence, analytics or market research/fieldwork for no longer than 3 years on 31st December 2016.

Consent for use of images, video and sound recordings containing personal data:

Participation in the BOBI Awards process assumes that 1. I give permission to BHBIA for photographs/video/sound recordings of me to be captured and used in printed and electronic media, including the internet, for promotional purposes. 2. I understand that some images or recordings may be selected for permanent preservation in the BHBIA archives and may be used for publication, broadcasting, public performance, displays and exhibitions.

If you do not consent to this please inform the organisers by email (admin@bhbia.org.uk) prior to the events (i.e. the Competition Day and/or Awards Ceremony) and we will ensure that your image is not identifiable in any footage that we publish.

All entrants' names and companies will be included in a 'contributors' listing at the awards event. If you would prefer not to be included in this listing, please advise us (admin@bhbia.org.uk) by the end of February 2017.

When you have successfully submitted your application you should receive a confirmation email - if you do not receive this please let us know immediately.

Please enter your details below

Name of Entrant:*

Email Address:*

Company Name:*

Name of Entrant's Line Manager:*

Manager's Email:*

Career History:*

Please list positions held during the last 5 years with dates.

I Tina Clayton confirm that:

☐ I am eligible for entry as defined above.*

☐ I have obtained my manager's permission to enter the Best Newcomer Awards. Both I and my manager understand that no more than 2 people may be entered from any given organisation and that the BHBIA reserves the right to limit entries if capacity is exceeded.*

☐ I am available to attend the competition day. *

☐ I agree to my name and photographs of the event appearing in BHBIA publications/the industry press if I am selected to take part. (Press may be in attendance at the event but no-one will be quoted without their permission).*

* Denotes mandatory field   **Submit ▶**

V BOBI Company of the Year Awards Entry Form

BHBIA @BHBIAssociation
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Make a Payment ›

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Your Member Account ›

🏠 〉 Members Area 〉 BOBI Company of the Year Awards Entry Form 〉

Navigation
Home
About the BHBIA ▸
Join the BHBIA ▸
Members Directory
Online Training/Tests
Training/Webinars ▸
BOBI Awards ▸
Events ▸
Guidelines ▸
Latest News ▸
Resources ▸
Jobs and Careers ▸
Contact the BHBIA
Make A Payment

BHBIA Updates

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Member Directory

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BOBI Company of the Year Awards Entry Form

Entry Deadline: 5pm on 31st January 2017

Please complete the details below. Please ensure that your company name is written correctly and underlined exactly as you would like it to appear in publicity if you are short-listed and on the trophy if you win (e.g. ensure that you include 'UK' or 'Ltd' as appropriate)

To be eligible to enter, your company must be a full BHBIA member company (Corporate, Affiliate or Personal) and you must be UK based and/or have a significant UK focus.

Please ensure your entry is completed on the official 2016-17 BOBI Company of the Year Entry Template (Pharma or Agency version as applicable), and upload it as a pdf file.

WHEN YOUR ENTRY HAS BEEN SUCCESSFULLY UPLOADED YOU WILL RECEIVE AN EMAIL CONFIRMATION. PLEASE KEEP THIS AS PROOF OF SUBMISSION. IF YOU DO NOT RECEIVE THE EMAIL PLEASE CONTACT US BEFORE THE DEADLINE HAS PASSED.

Name of Organisation:*

Name of key contact for correspondence (if different from the person submitting this form):

Email address of key contact for correspondence (if different from the person submitting this form):

The category you wish to enter:*

Please select ▼

Submission document:* (Max size 2mb)

Choose File | No file chosen

I Tina Clayton confirm that:

☐ All the relevant team members understand and agree to the conditions of entry* (including consent for use of photographs & video/sound recordings provided or created in connection with the awards process).

☐ All the necessary permissions/approvals for submission of this entry have been obtained.*

* Denotes mandatory field

Submit ›

Brand Guidelines

BHBIA
British Healthcare Business Intelligence Association

The logo

The logo should always sit on the top left of the front page on all documents. The main colour used is the purple and exceptions only apply when it is not visible on the background colour.

BHBIA purple Pantone 7446

BHBIA black

Reversed out white logo on purple

The logo

BOBI award logos should be as shown as:

BHBIA Pantone 7446C/321C/
Cool Gray 9C

Reversed out white logo on purple

BHBIA black

Reversed out white logo on black

43

The graphic element

There are a few variations of the graphic element and these are used on the front cover to break up solid colour and also solid colour and pictures. These are to be used within the BHBIA colour palette. These can also be used on the inside pages sparingly and must bleed off both edges.

1

2
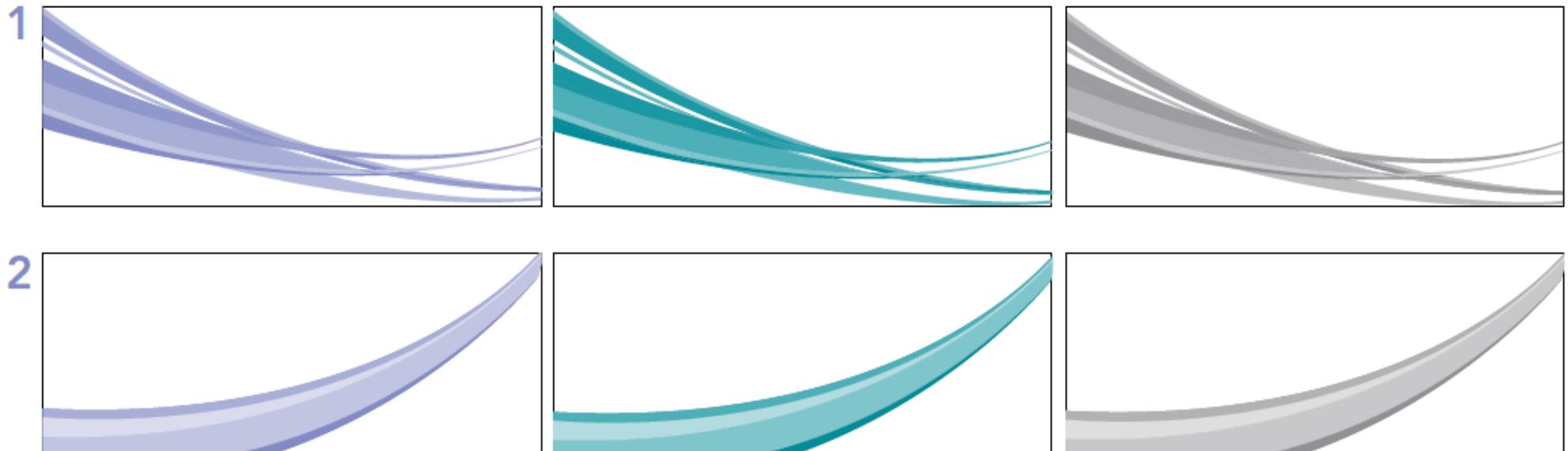
The graphic element
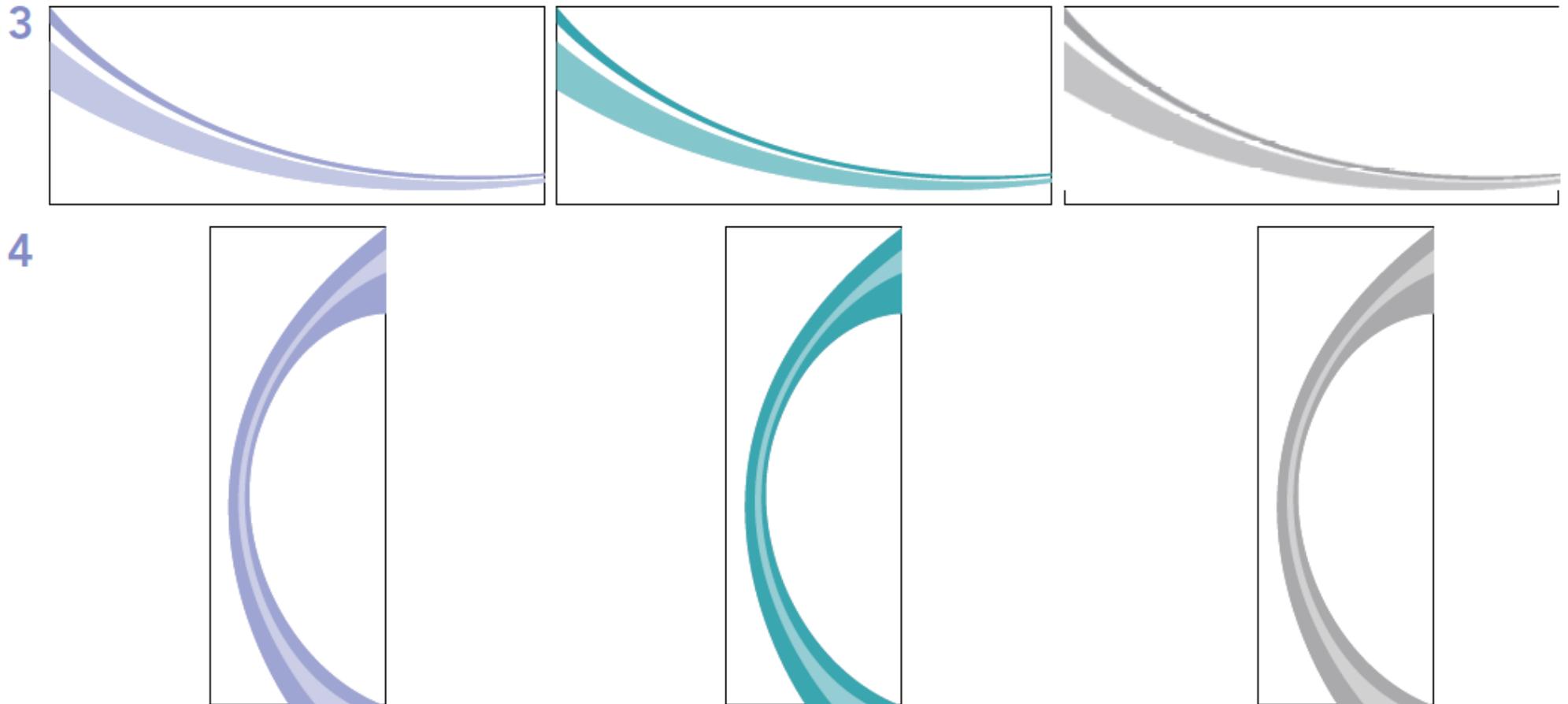
The logo: Don'ts

The coloured version of the logo should not be reproduced on the BHBIA house colours where it is illegible.

The logo should not be reproduced on patterns where the logo becomes difficult to see.

The logo proportions should not be changed.

The House of cards…?
Where do we place our bets

Elements of the logo and text should not be reproduced in different proportions.

The House of cards…? Where do we place our bets

The text alongside the logo should not be reproduced with other typefaces.

House colours

The BHBIA house colours consist of the following colours plus a secondary palette to use if extra colours are needed for differentiation.

Primary colour palette

BHBIA Purple

Pantone 7446C
CMYK: 38,34,0,0
RGB: 126,119,193

BHBIA Green

Pantone 321C
CMYK: 83,1,18,18
RGB: 0,120,135

BHBIA Grey

Pantone Cool Gray 9C
CMYK: 13,8,4,40
RGB: 97,98,102

Secondary colour palette (text colour)

BHBIA Blue

Pantone 280C
CMYK: 100,72,0,18
RGB: 0,73,144

BHBIA Orange

Pantone 1575C
CMYK: 0,45,72,0
RGB: 248,158,89

BHBIA Pink

Pantone 241C
CMYK: 27,100,0,2
RGB: 181,26,138

Secondary colour palette (tinted boxes)

BHBIA Blue

RGB: 158,160,192

BHBIA Orange

RGB: 232,201,177

BHBIA Pink

RGB: 205,168,196

Primary and secondary colours:

|						
CMYK: 52,50,0,0 RGB: 141,133,201	CMYK: 81,25,37,8 RGB: 0,137,150	CMYK: 52,42,39,23 RGB: 119,119,122	CMYK: 65,0,20,0 RGB: 70,194,210	CMYK: 100,90,34,22 RGB: 2,33,105	CMYK: 0,61,83,0 RGB: 255,127,46	CMYK: 32,98,0,0 RGB: 181,23,131

Tints of primary and secondary colours:
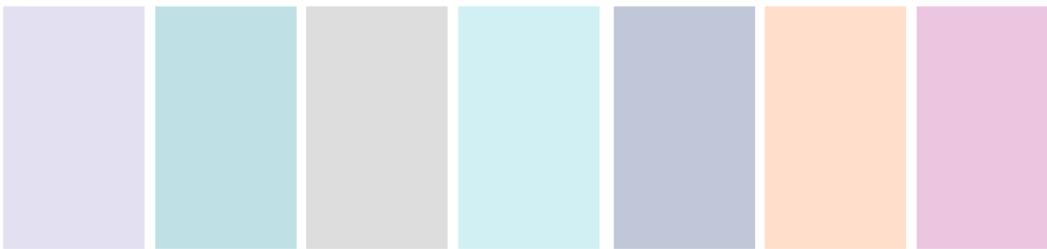
CMYK: 13,12,0,0 RGB: 226,224,241	CMYK: 29,1,12,0 RGB: 191,225,229	CMYK: 16,11,12,0 RGB: 221,221,222	CMYK: 21,0,7,0 RGB: 209,240,244	CMYK: 29,18,9,0 RGB: 191,199,217	CMYK: 0,17,21,0 RGB: 255,223,203	CMYK: 7,30,0,0 RGB: 236,197,224

Other colours used:
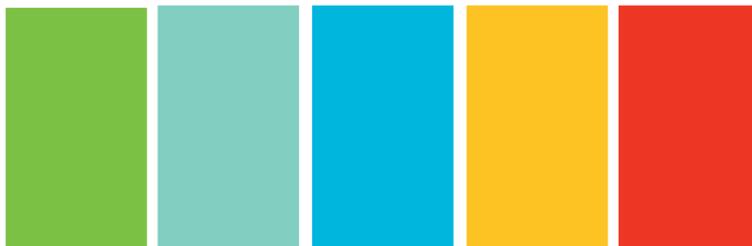
CMYK: 52,49,0,0 RGB: 235,0,139	CMYK: 52,0,31,0 RGB: 130,206,192	CMYK: 72,2,10,0 RGB: 0,182,221	CMYK: 1,26,89,0 RGB: 252,195,35	CMYK: 0,88,86,0 RGB: 238,54,36

Tints of other colours used:
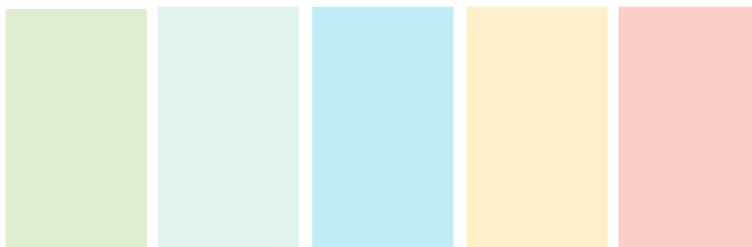
CMYK: 17,0,25,0 RGB: 222,239,208	CMYK: 15,0,9,0 RGB: 224,243,239	CMYK: 28,0,7,0 RGB: 191,237,246	CMYK: 1,26,89,0 RGB: 252,195,35	CMYK: 0,27,17,0 RGB: 251,205,200

The typeface

Century Gothic Regular

Century Gothic Bold

Avenir Light

Avenir Bold

Century Gothic Regular and Bold are used in the headings. This slightly wider sans serif font makes titles more legible and using two different weights puts more emphasis on particular words.

By using a different font and weight, this typeface gives a clean and simple graphical style can be easily reproduced.
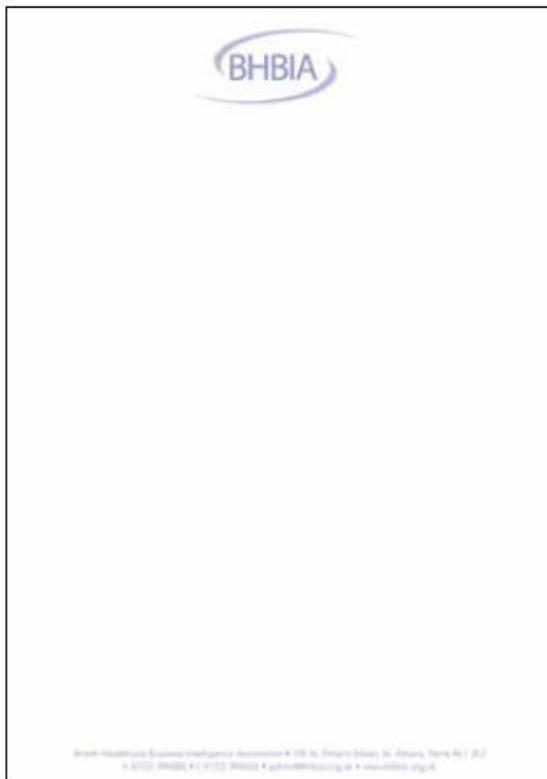
Arial

Arial Bold

Arial and Bold is the alternative to Avenir Light and Bold for anyone without a licence or for typesetting letters in desktop applications.

The stationery

The point sizes on a letter should not be any bigger than 10pt in Arial if Avenir is not available.

Letterhead

Continuation paper
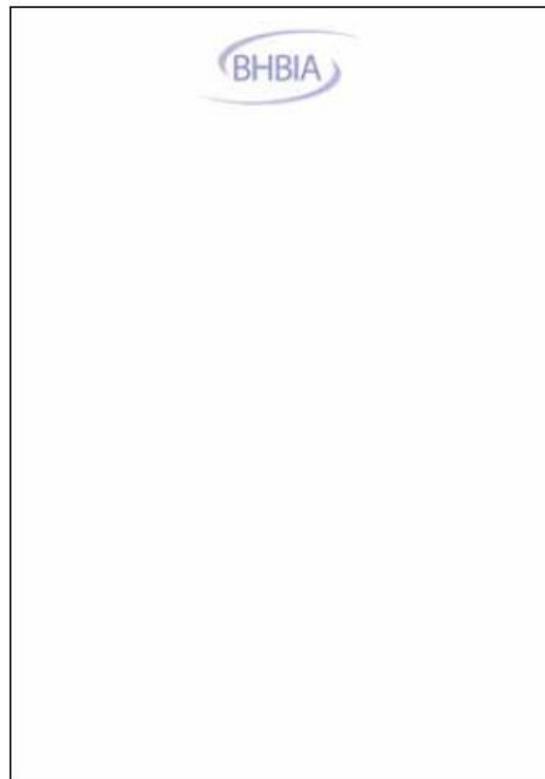
Compliment slip

Powerpoint

Example slides below for powerpoint presentations, the graphic swoosh and logo/s are set in the master slide and can't be changed.

Slide 1

Slide 2