Unlocking the Power of SAI360

New Content Editor, Integrated Disclosure Capture and Improved Analytics

Dominique Biliato, VP of Learning Operations

Jimmy Lin, Chief Product Officer

Kari Marcum, VP of Customer Success

June 4, 2025

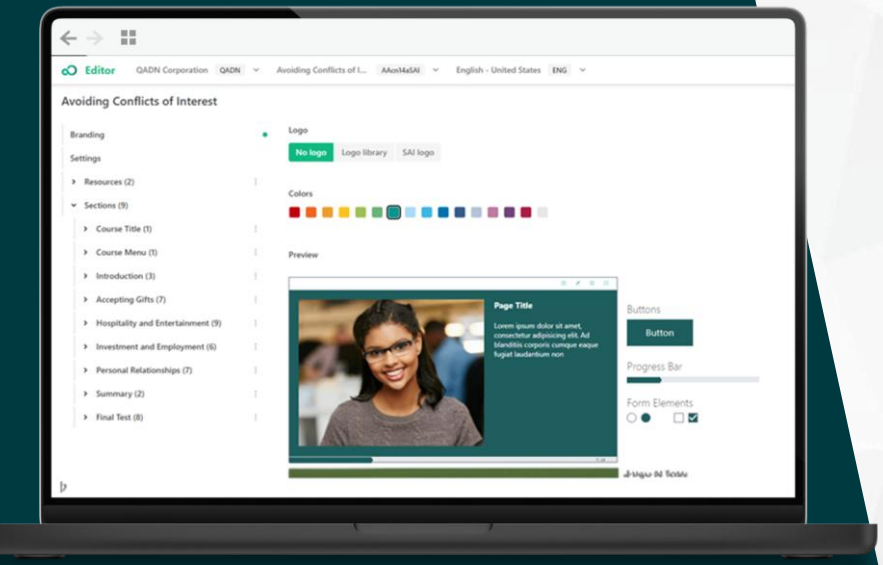
Agenda

- Content Editor
- Disclosure Manager
- Training Analytics

Content Editor

Launching next month, control your content

Content Editor
(launching in July)



Quickly customize course content

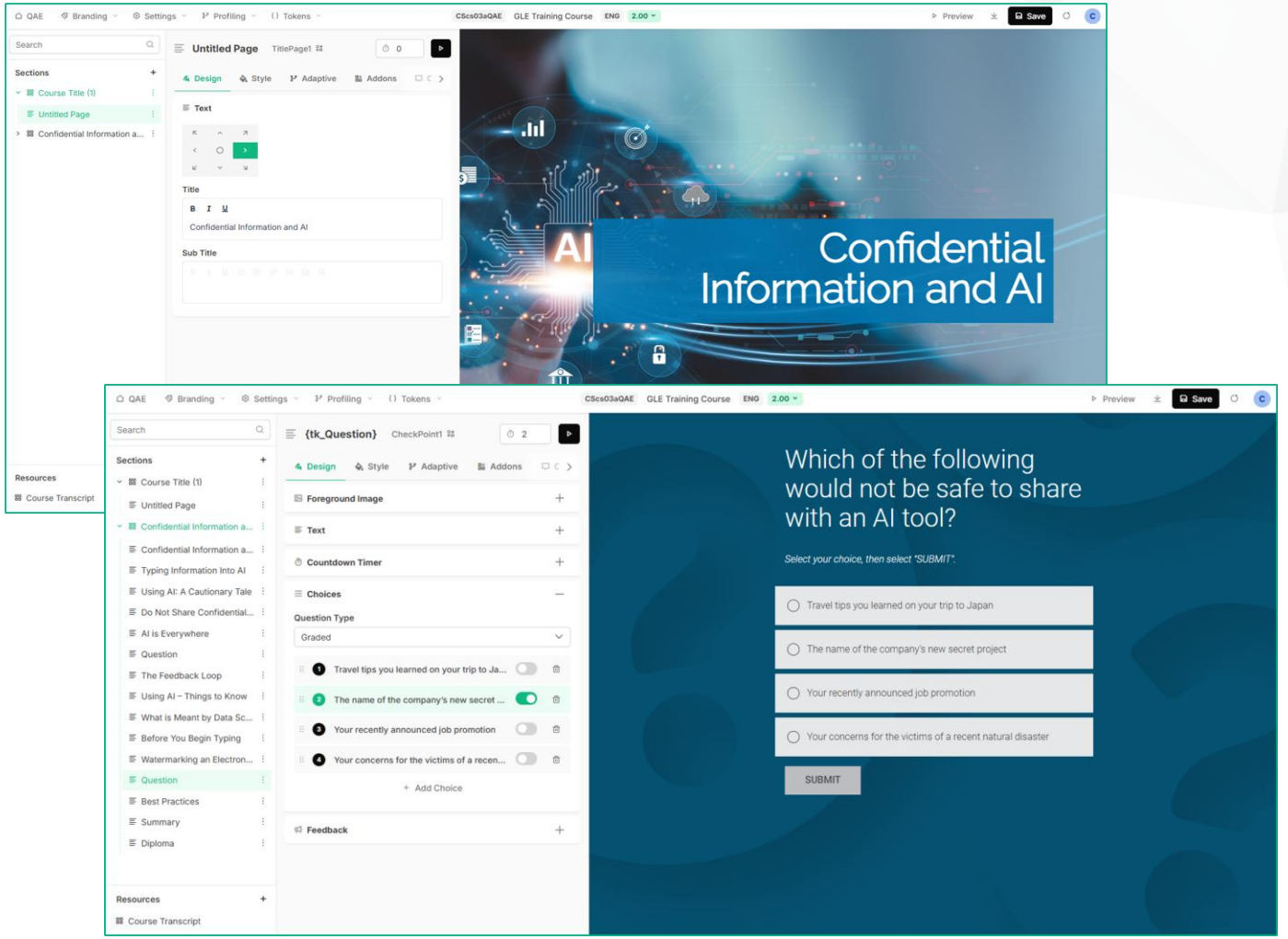
Preview and publish changes in minutes - LMS-agnostic

Flexible and easy-to-use - hosted on our SAI360 Platform

Your choice - use Editor or we do the work for you

Introducing SAI360 Editor

- Save Time
- Edit Courses for Free, Anytime
- Real-Time Review and Launch
- Included in Course Pricing
- Increased Control



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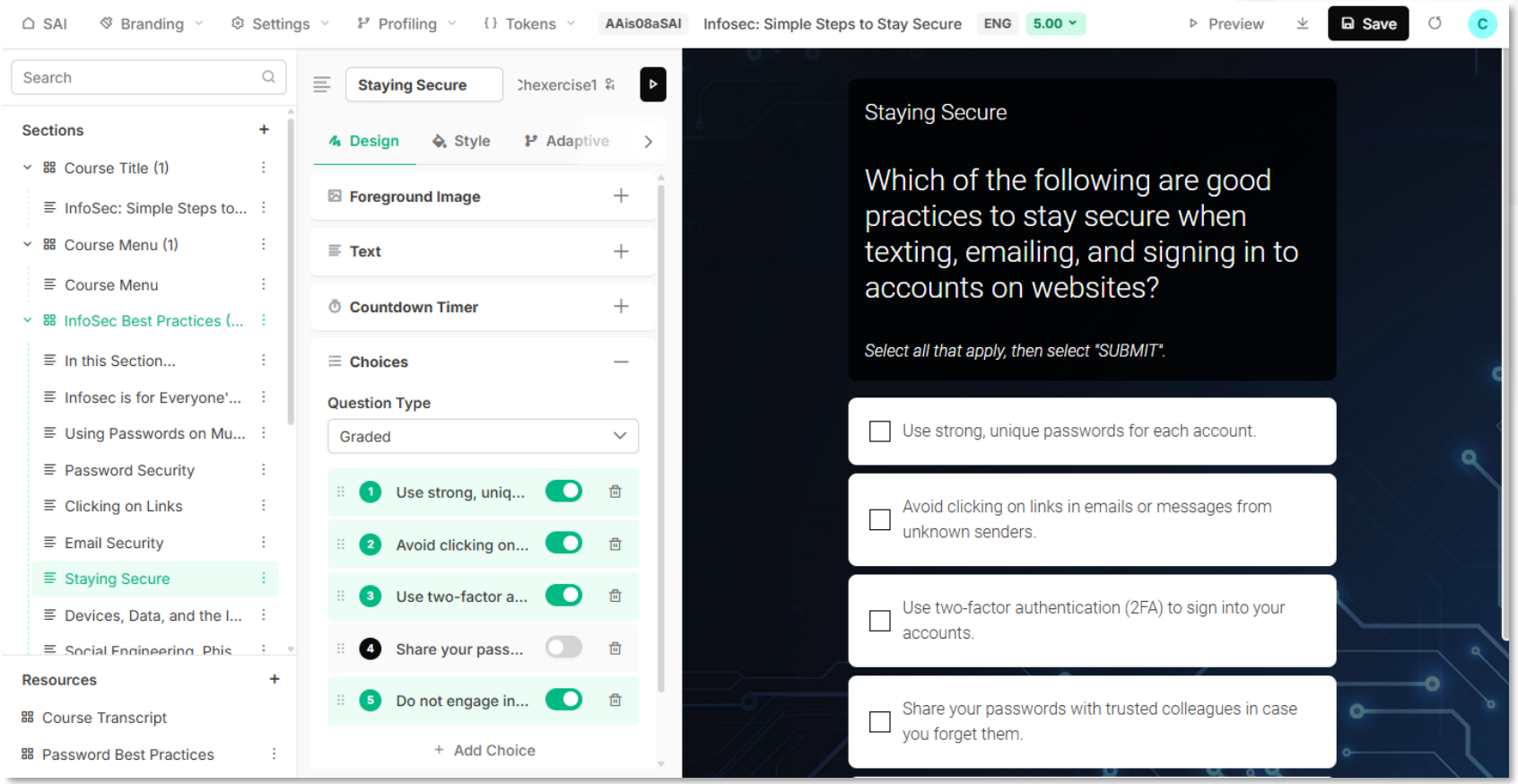
Easily control and create content

- Add, Edit and Delete Any Content
- Rearrange Pages and Sections
- Ability to Add Resource Documents
- Easily Update Branding
- Preview All Updates Immediately
- Publish and View LMS Links in Minutes

Editor Helps You With…

- On-Demand Course Updates
- Customize Training for Different Departments
- Maintain Consistent Branding
- Rapid Response to Training Feedback



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The Impact

Reduce development time associated with designing training.

Increase employee engagement and knowledge retention with interactive and customizable courses.

Adapt quickly to regulatory changes and evolving requirements.

Demonstrate compliance effectiveness with comprehensive analytics reporting capabilities.

Whether you choose to use Editor or have us do the work for you, we have you covered.

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Upcoming Editor Releases

- First customer access to Editor from the Training Module (end of June)
- Support non-English editing (mid-August)
- Collaborative editing (Q3)

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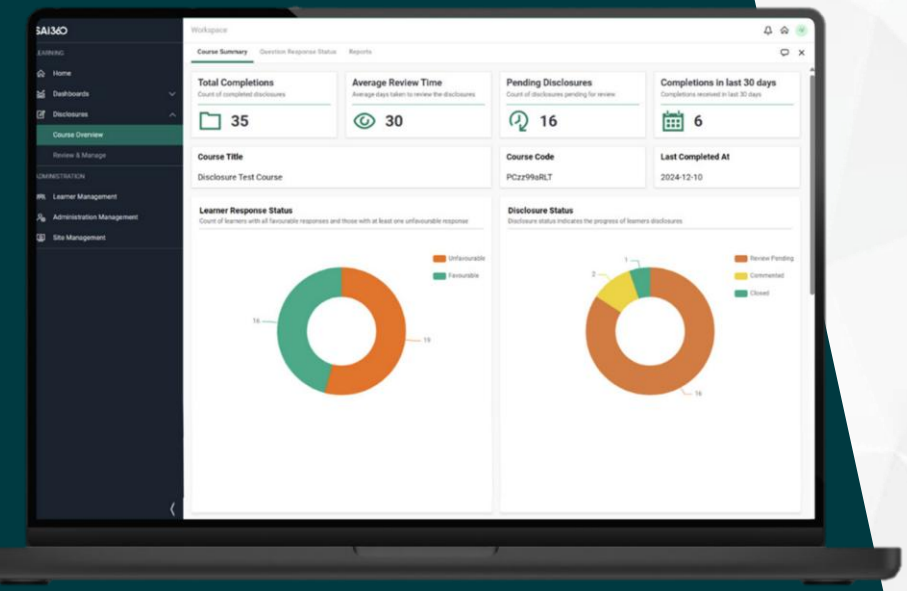
Disclosure Manager

Integrated disclosure data and workflow

Disclosure Manager
(now available)



- Centralized disclosure tracking and management
- Embedded disclosures for seamless completion
- Real-time analytics for actionable insights
- Collaboration tools to streamline teamwork

SAI360 Disclosure Manager

- Centralized disclosure tracking and management.
- Embedded disclosures for seamless completion.
- Real-time analytics for actionable insights.
- Collaboration tools to streamline teamwork.
- SLA monitoring to ensure timely reviews.
- LMS-agnostic, works with any SAI360 course, regardless of LMS.

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Course Summary | Question Response Status | Response Drill Down | Reports

Total Completions
Count of completed disclosures

46

Unfavourable Disclosures
Learners with atleast 1 unfavourable response

24

Open Disclosures
Count of disclosures Pending for Review

19

Potential Conflict
Learners with potential conflict

19

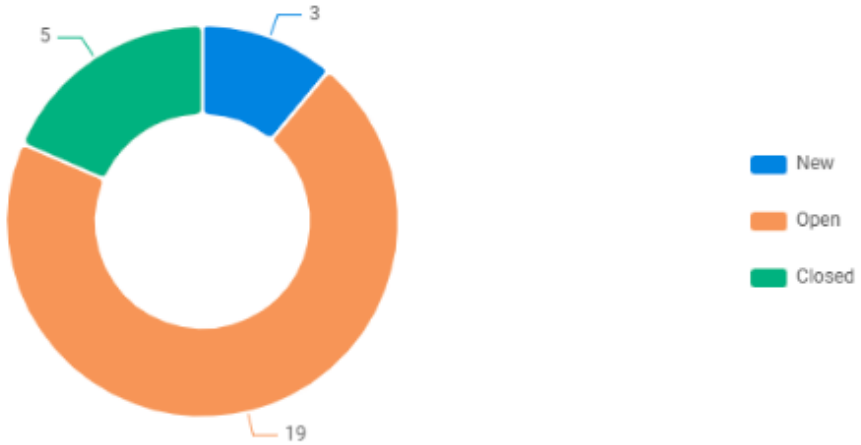
Course Details
Disclosure Test Course

Code of Conduct

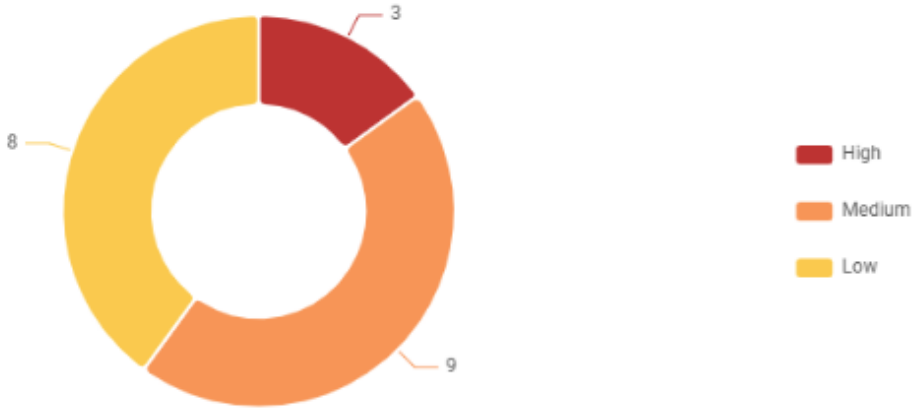
Last Completed At
2025-05-23

Course Code
PCzz99aRLT

Disclosure Status
This indicates the progress of learner's disclosures



Risk Analysis
Count of Risk level assigned



Reviewer Turnaround Time
Time taken to review the disclosures

Total Questions

as # in selected course

8

Response Counts

as # favorable vs unfavorable

Total	Favorable	Unfavorable	Unfavorable Rate
368	293	75	20.4%

QUESTION ID	QUESTION	FAVORABLE	UNFAVORABLE	ACTION
436	I have an additional disclosure to make with respect to one of the questions set forth on the next page.	33	13	View more
424	I certify that I have received and read the RLT Code of Ethics and Business Conduct (the "Code") and I understand and accept the statements contained therein. As of this date, I am in compliance and will continue to comply, with the provisions of the Code and all future revisions, except to the extent of any exception (i) described on the next page, (ii) as previously reported according to the procedures set forth in the Code or under a previous certification, or (iii) approved by persons with the proper authority from the RLT Business Ethics Committee or the RLT Board of Directors or a committee of the Board of Directors. Please select "No" if you need to make a new disclosure or provide new information about a prior disclosure.	33	13	View more
428	If you have immediate family members or close personal friends with financial interest in, or direct or indirect relationship with, any provider, supplier or vendor of goods or other services, of which you have knowledge, to RLT or its subsidiaries please answer yes and provide more details on the next page. PLEASE SELECT "NO" IF YOU HAVE NOTHING TO REPORT.	33	13	View more
432	I certify that I have no criminal felony convictions, except as described on the next page. Please select "No" if you need to disclose a conviction.	35	11	View more
430	I certify since my last certification that I have fully disclosed in the gift register maintained by my company all gifts and entertainment received by me from any vendor, supplier or business partner in accordance with the Code. PLEASE SELECT "YES" IF YOU HAVE NO GIFTS OR ENTERTAINMENT TO REPORT	35	11	View more

Filters

Load | Save As...

Course Title

Closed, No Action Needed
Closed, With Remediation
New
Open, Additional Informati...
Open, Escalated for Furthe...
Open, Review Pending

Risk Level

Search...

High Risk
Low Risk
Medium Risk
No Risk

Select Date | Search Learners

STATUS	IS POTENTIAL ...	LEARNER ID	LEARNER NAME	ANSWER DATE	COUNTRY	DEPARTMENT	LAST MODIFIED...	COMMENT
Open	Yes			May 22, 2025			shivangi.verma@sa	
Closed	Yes	622	622 - Patrick W	May 15, 2025	United States	Operations	shivangi.verma@sa	
Closed	Yes	252	252 - Vandana	May 8, 2025	India	Operations	shivangi.verma@sa	
Closed	No	shivangi.verma@sa	shivangi.verma	Apr 15, 2025	India	Product	shivangi.verma@sa	I believe this doe
Open	Yes	chris.daly@sai360.	chris.daly@sai	Apr 14, 2025	United States	Product	shivangi.verma@sa	Validated and tes
Open	Yes	chris.daly@sai360.	chris.daly@sai	Apr 14, 2025	United States	Product	shivangi.verma@sa	Validated and Clc
Closed	Yes	chris.daly@sai360.	chris.daly@sai	Apr 14, 2025	United States	Product	shivangi.verma@sa	This is looking fir
Open	Yes	chris.daly@sai360.	chris.daly@sai	Apr 14, 2025	United States	Product	shivangi.verma@sa	Validate and upd
Open	Yes	566	566 - Stacey N	Apr 10, 2025	United States	Product	shivangi.verma@sa	Validated
Open	Yes	231	231 - Karthik K	Mar 19, 2025	India	Operations	shivangi.verma@sa	done changes
Open	Yes	231	231 - Karthik K	Mar 19, 2025	India	Operations	shivangi.verma@sa	**Done**
Closed	No	949	949 - Komal Sa	Mar 17, 2025	India	Product	shivangi.verma@sa	
Open	Yes			Mar 14, 2025			shivangi.verma@sa	looks good! but n
Closed	No	473	473 - Kristen C	Mar 13, 2025	United States	Sales	shivangi.verma@sa	
Closed	No	605	605 - Lester Ta	Mar 12, 2025	United States	Operations	shivangi.verma@sa	

36 items

1 | 25

Learning / Disclosures / Benchmark

Course 1 *

Disclosure Test Course

Department

Department

Function

Sales Admin | Product Manager | Product Management

Date Range

Select Date

Course 2 *

Disclosure Test Course

Department

Department

Function

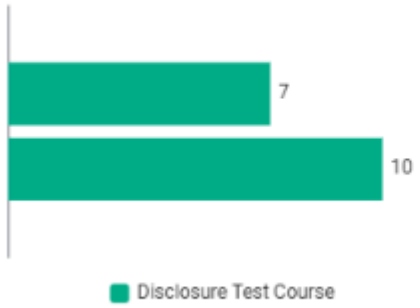
CS General Support | Sales Client Success | Senior Product Manager

Date Range

Select Date

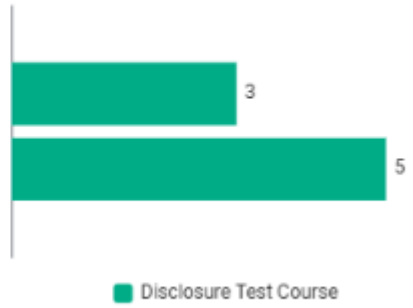
Total Completions

Count of completed learners across courses



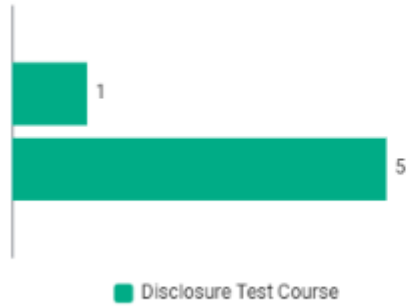
Unfavourable Disclosures

Learners with at least one unfavorable response upon



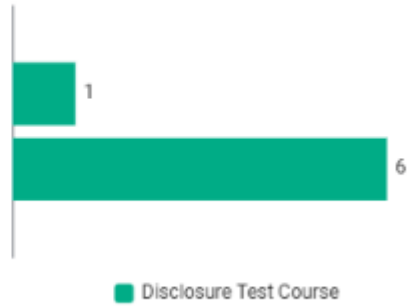
Open Disclosures

Count of learners with open disclosures requiring review



Potential Conflict

Learners identified with potential conflict of interest



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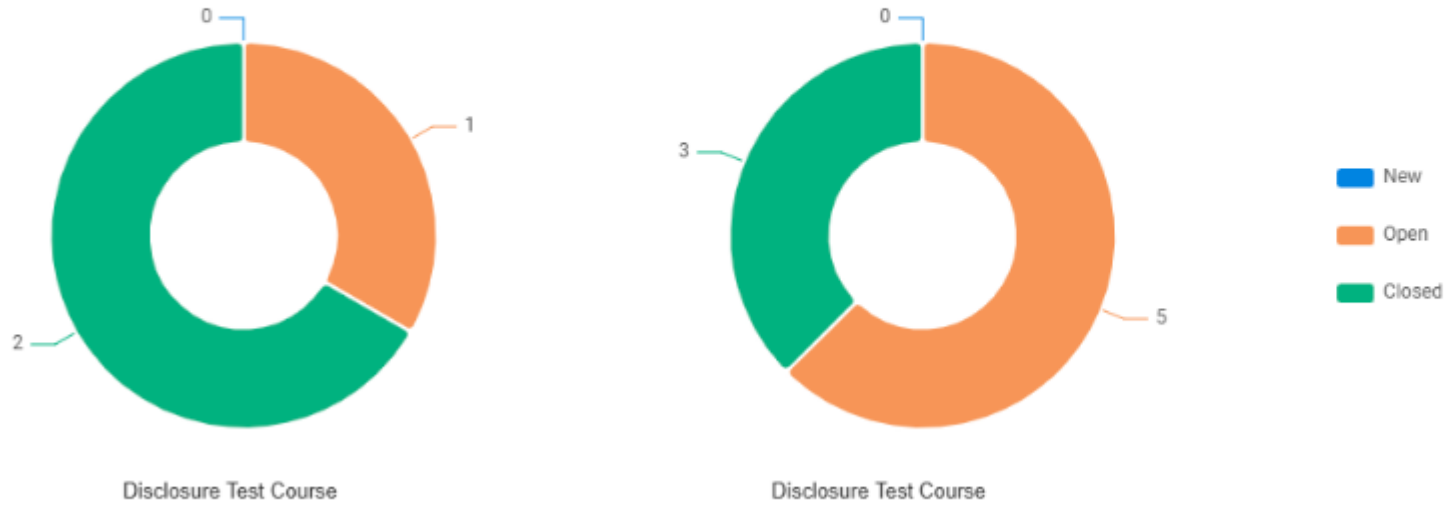
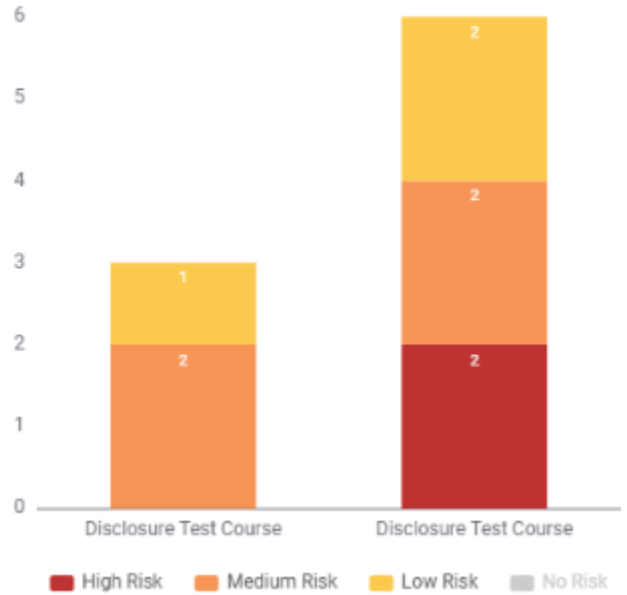
Disclosure Status

This indicates the progress of learner's across courses



Risk Analysis

Count of Risk level assigned



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Common Use Cases

Conflict of Interest Reporting

- Employees disclose personal or financial interests that may conflict with their professional responsibilities.

Policy Acknowledgements

- Collect and track employee acknowledgments of compliance policies, ensuring everyone understands their obligations and documenting adherence for audits.

Audit Readiness and Reporting

- Maintain a comprehensive audit trail for all disclosures, simplifying regulatory audits and providing clear documentation to demonstrate compliance efforts.

Annual Compliance Certifications

- Automate the collection of annual certifications for ethics and compliance policies, ensuring timely submission and adherence to organizational standards.

Training-Linked Disclosures

- Embed disclosure requirements within compliance training to ensure employees act promptly on reporting obligations, enhancing both engagement and policy awareness.

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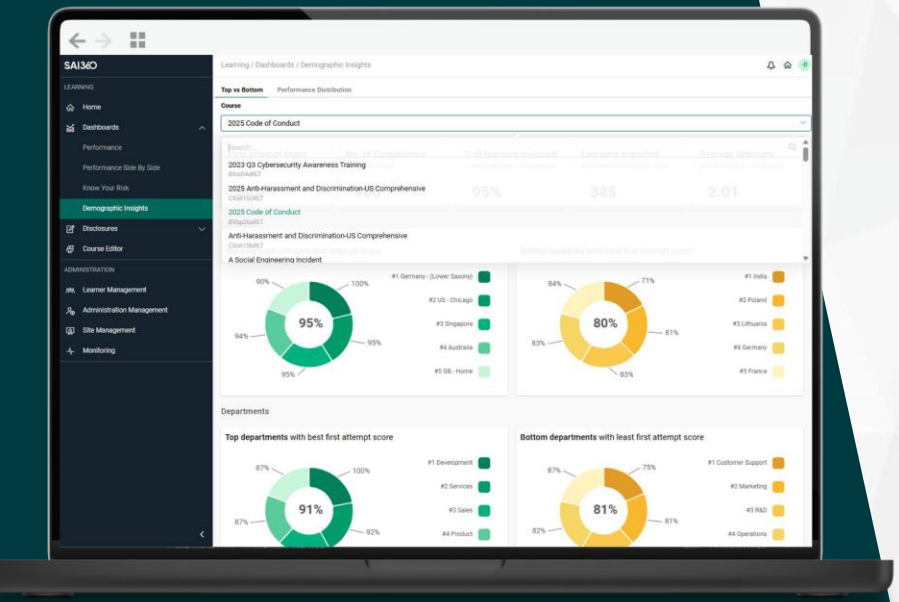
Training Analytics

Performance dashboard with new demographics insights

Performance Dashboard



- Deep actionable insights
- Identify and mitigate risk
- Detailed question-level performance
- LMS agnostic

Training Analytics

SAI360
RISK FROM EVERY ANGLE

Welcome Christine Brown.

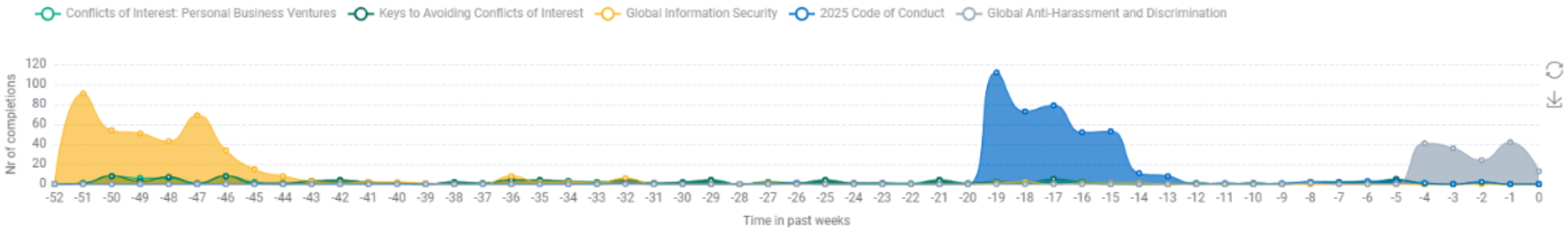
Here is a quick overview of your organization's courses.
To learn more about the performance of your courses, you can access the Performance dashboards.

957 Learners imported

335 Completions in last 30 days

Course Completions

52 week overview of top/recent course completions

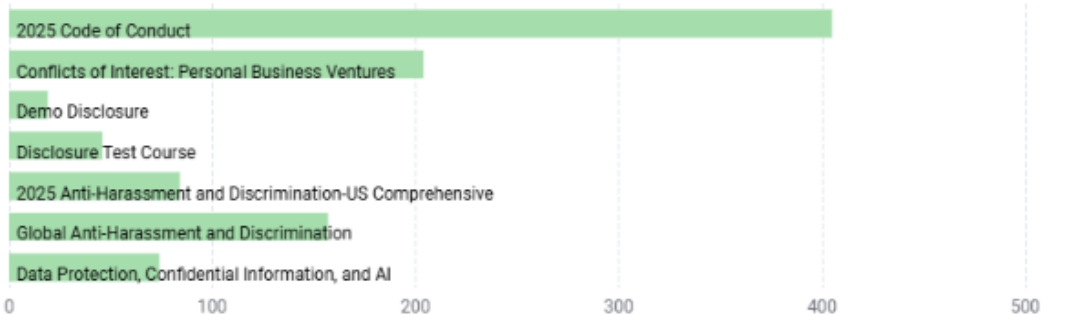


Top 10 Courses with Completion Activity

Most completed courses in past 90 days

Course Progress

Completed Course Executions



Course Performance Summary

Export to PDF

Course: All | Date: 3/8/2022 – 5/27/2025 | Profiling Question: All

In Course Score
as % of completed learners
93%

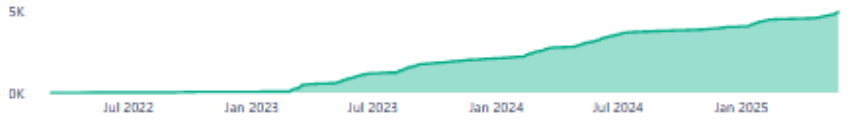
Post Assessment Score
as % of completed learners
77%

Time on Question
as average in time
00:00:34

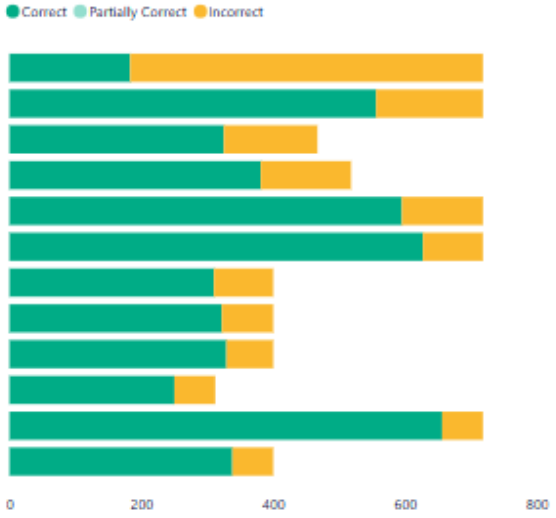
Time in Learning
as average in time
00:38:17

Number of Completions
as # of completed learners
4,940

Completions Over Time
of cumulative completions in time

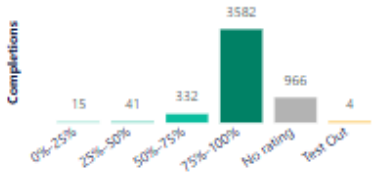


First Attempt Performance
as correct vs partially correct vs incorrect by question



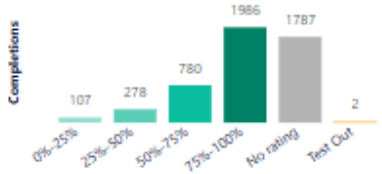
Distribution of In Course Performance
as % of learners by average first attempt scoring bracket

1.04
Average Attempt



Distribution of Post Course Performance
as % of learners by average first attempt scoring bracket

1.58
Average Attempt



Filters

Search

Filters on all pages

- Country is (All)
- Department is (All)
- Function is (All)
- Region is (All)
- Tenure is (All)

Cover | Executive Summary | First Attempt Performance | Question Summary | Answer Summary | Attitudinal Insights

Course Performance Summary Side-by-Side

Export to PDF

SAI360

Filters

Search

There aren't any filters to display.

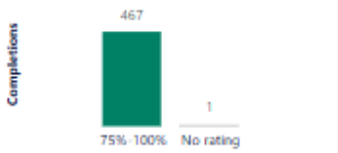
	Course	Date		Country	Department	Function
Left	SAI GLOBAL MAIN SITE (Sites) + 17. SAI360 Code of Conduc...	2/1/2024	2/10/2025	All	All	All
Right	SAI GLOBAL MAIN SITE (Sites) + 26. 2025 Code of Conduct (...	10/18/2024	5/18/2025	All	All	All

	In Course Score	Post Assessment Score	Number of Completions	Time in Learning
	as % of completed learners	as % of completed learners	as # of completed learners	as average in time
Left	100%	77%	468	00:32:21
Right	96%	81%	404	00:59:14

Distribution of In Course Performance

as % of learners by average first attempt scoring bracket

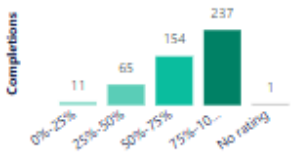
1.00 Average Attempt



Distribution of Post Course Performance

as % of learners by average first attempt scoring bracket

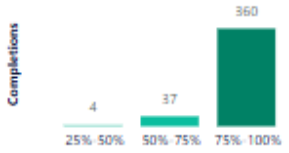
2.09 Average Attempt



Distribution of In Course Performance

as % of learners by average first attempt scoring bracket

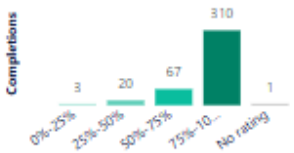
1.02 Average Attempt



Distribution of Post Course Performance

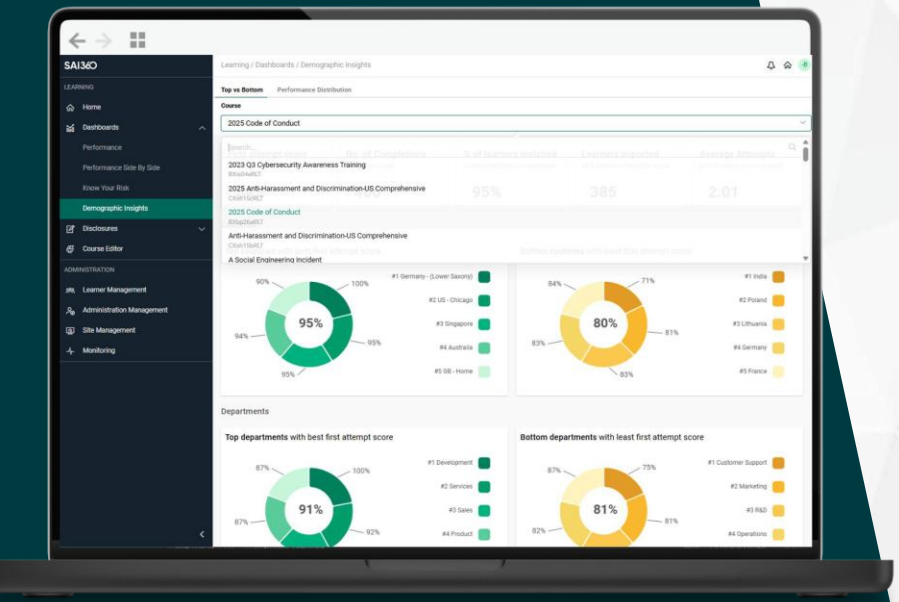
as % of learners by average first attempt scoring bracket

1.44 Average Attempt



Cover | Side By Side

Demographic Insights
(now available)



- Identify how key metrics differ across groups
- Compare high and low performing groups by demographic categories
- Take action on disparities to boost training program efficiency

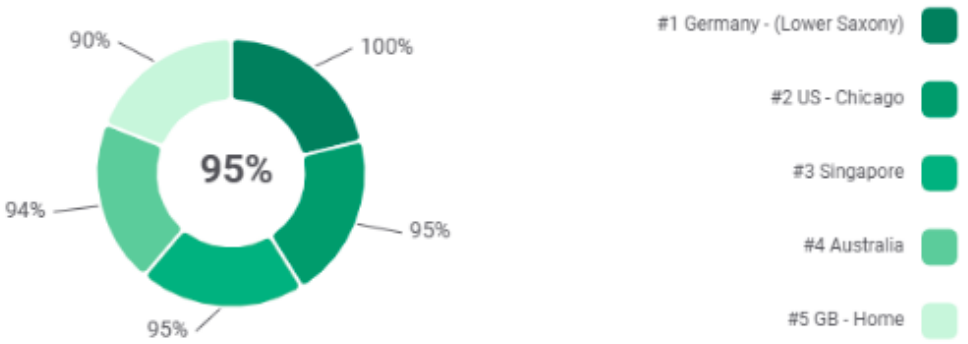
Top vs Bottom | Performance Distribution

Course

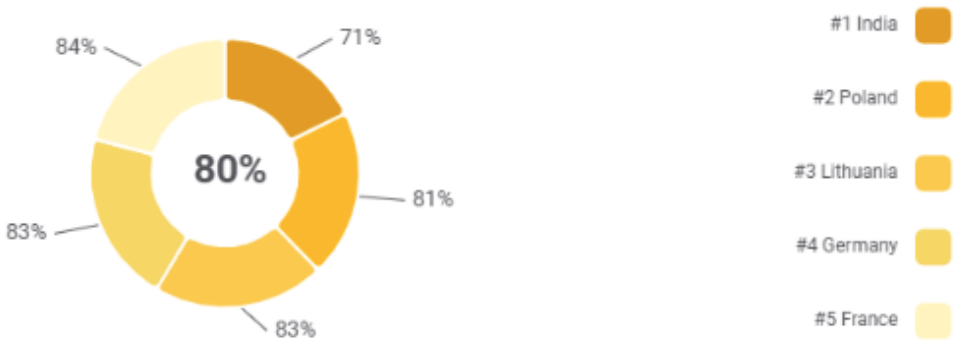
2025 Code of Conduct

Countries

Top countries with best first attempt score

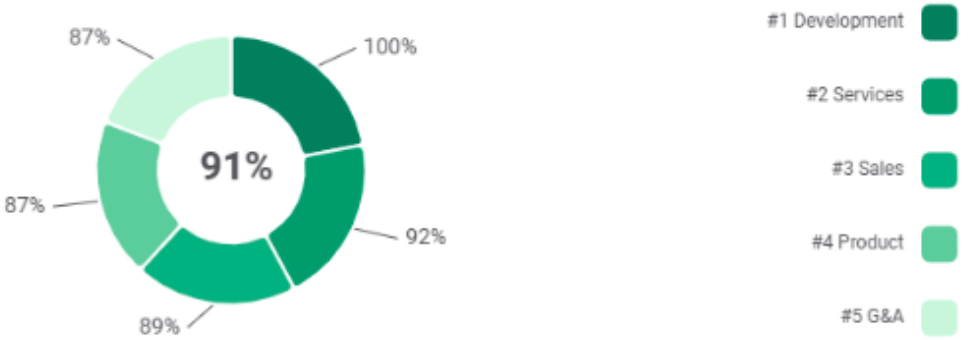


Bottom countries with least first attempt score

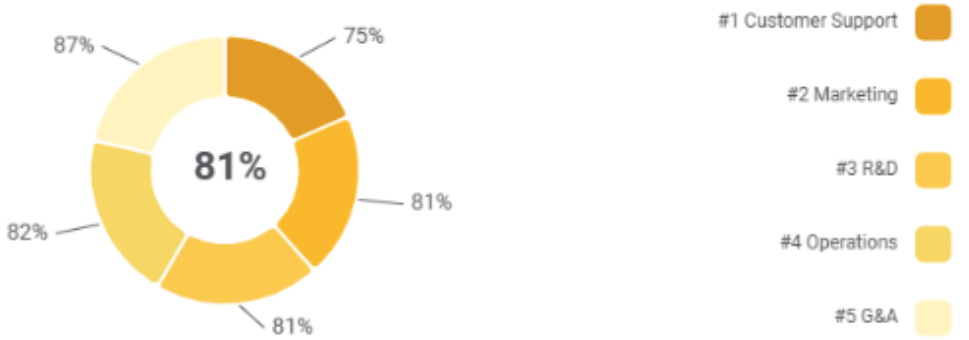


Departments

Top departments with best first attempt score



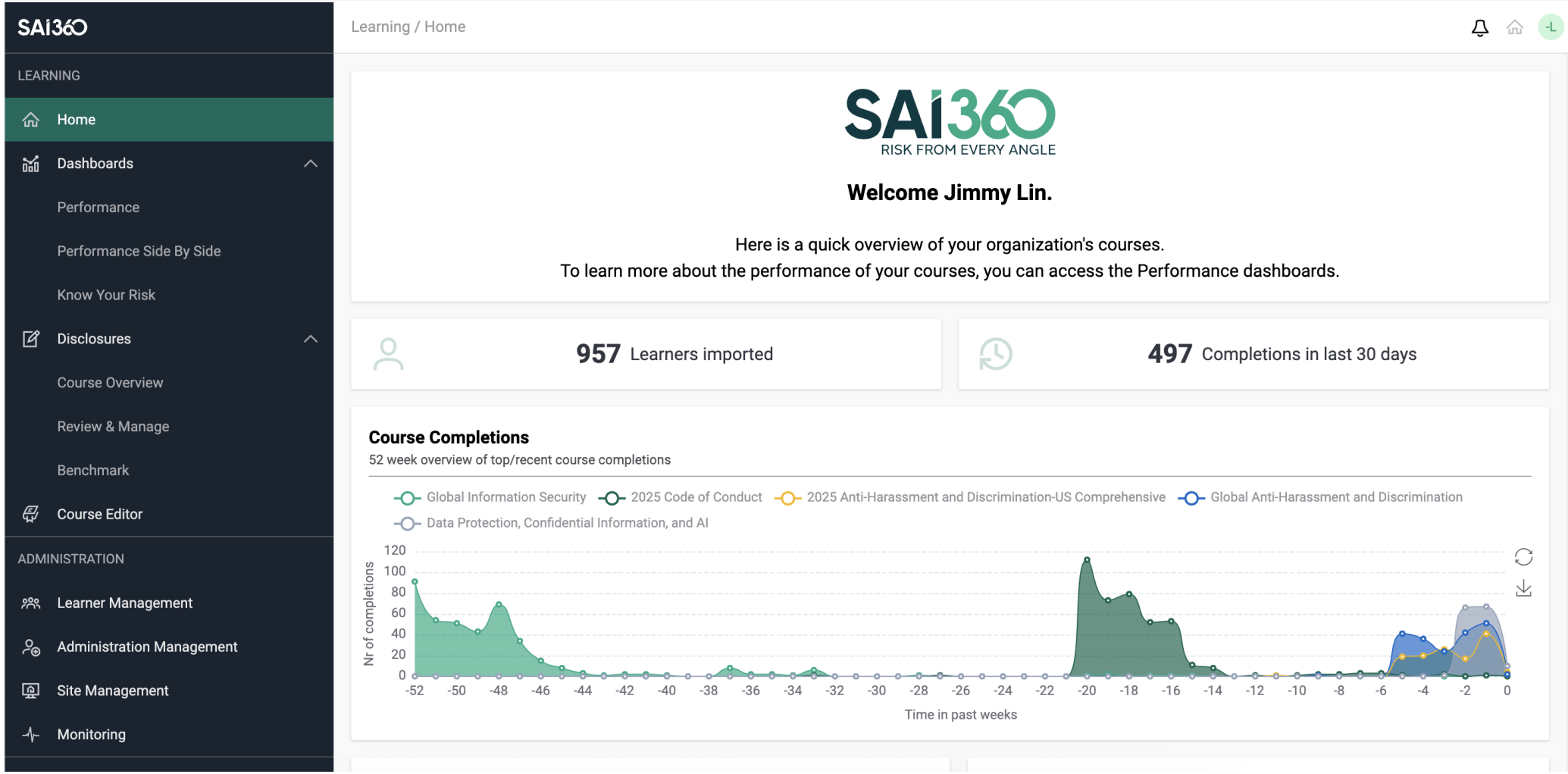
Bottom departments with least first attempt score



Functions

All These Tools Come Together

SAI360 GRC Platform – Training Module



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Questions & Feedback