Let's get you started.

A friendly guide to finding your way around Crown 360.

Public-sector work can come with a lot of questions. What do buyers need? Which documents should you prepare? And where do you find work that actually fits your business?

Crown 360 brings those tasks into one place. This guide will help you take your first assessment, organise what you already have, explore opportunities and begin preparing a bid.

You don't need to do everything at once. Start with the free assessment, or turn straight to the task you need help with.

Find your starting point

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Each chapter is followed by real screens from a fictional example account. The free and paid menus differ, and some features depend on your plan and availability.

Take your free assessment

Start with a picture of where your business is today. You don't need a folder full of perfect documents before you begin.

Create your account

1. On the Crown 360 website, choose the free assessment option.

2. Enter your company name, email address and password. Read and accept the terms, then select **Start my free assessment**.

3. Follow any email verification instructions, then open **Free Gap Analysis**.

Work through the questions

The assessment has seven stages: six groups of readiness questions, followed by Personalise your experience. Answer using what your business has now. If a question is unfamiliar, open its help for an explanation and examples. Where an uncertainty option is offered, use it rather than guessing.

Check that each answer has saved before moving on. A successful save updates your progress and turns the question pale green. Some details, including insurance information, have their own **Save** button.

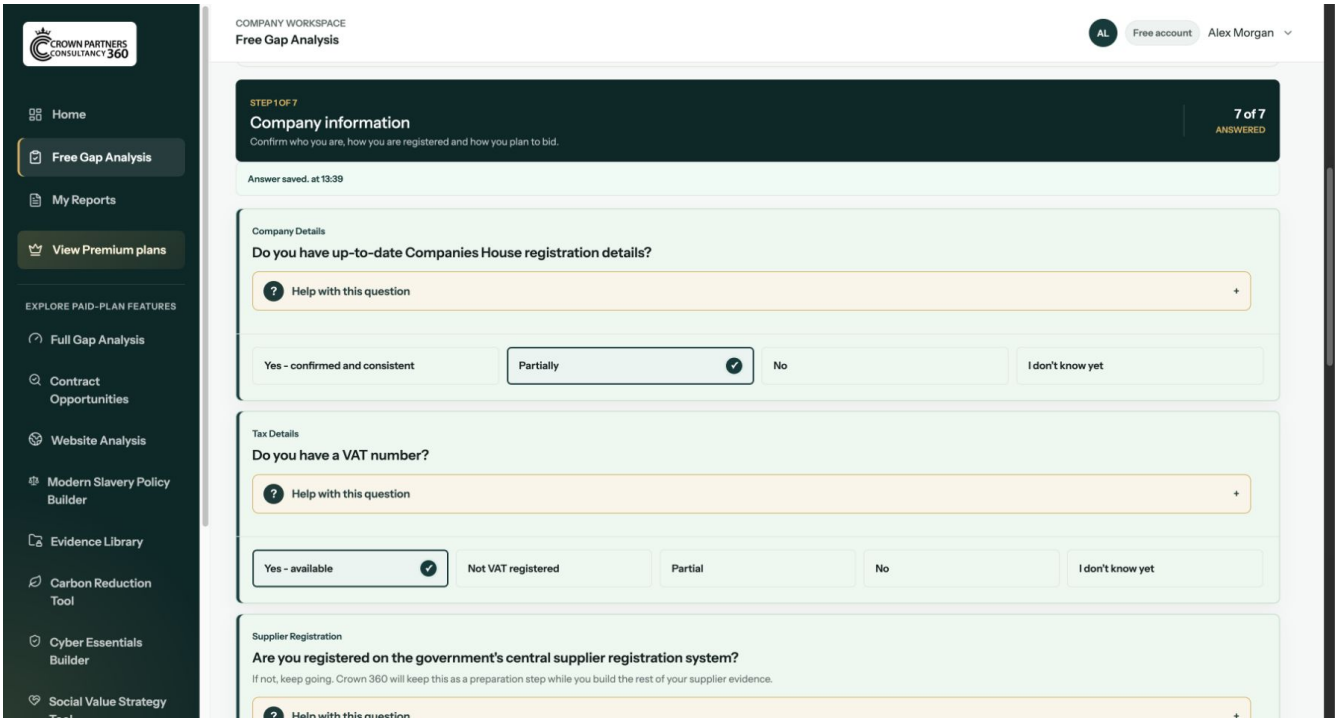
Make sense of your results

Your summary groups the topics you've answered so you can see what appears to be in place, what needs checking and where there's work to do. Expand a category to revisit the answers behind it.

Choose one useful next step. That might be checking an insurance renewal date or finding a certificate you already hold. Your results describe the information you've supplied; they don't confirm that you meet every buyer's requirements.

Good to know: You can save your progress and come back. An honest 'not sure' gives you a better starting point than an optimistic guess.

Your assessment, on screen



A saved answer in Company information. The green confirmation and tick show that the selection has been recorded.

What to look for

1. Use the answer that describes your business today. Here, the example company has chosen Partially.

2. Open Help with this question when you need an explanation.

3. Use the section links higher up the page to move through all seven stages.

Screens captured on 26 October 2026. Company details and saved work are fictional examples. Check current notices and account terms before acting.

Set up your workspace

With a subscription, your workspace becomes the place to keep your preparation and search for work moving forward.

Find your way around

When you first enter Premium, check the company details brought across from your assessment and choose **Save and open Premium**. You can also use **Go to my workspace now** and finish those details later.

Start at **Overview**. Expand the menu groups on the left to find your preparation tools, opportunities and documents. On a phone, use the menu button at the top. **Take a quick tour** on the dashboard helps you find your way around.

Tell Crown 360 what you actually do

1. Open **Company Profile** and check your company details and website address.

2. Describe the services you deliver. Be specific: 'commercial office cleaning' is more helpful than 'business services'.

3. Add the regions you can serve and the relevant preferences offered on the page.

4. Save your changes. Update the profile when your services or delivery area change.

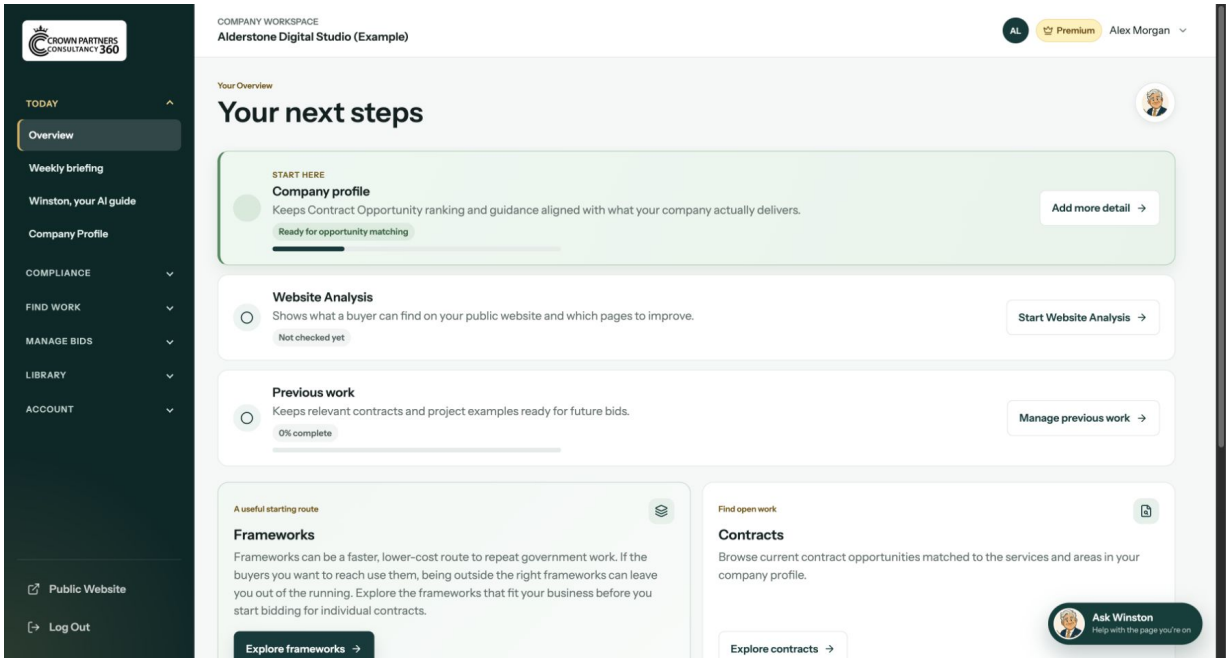
These details help make the guidance and opportunity matching more relevant. If your business does several things, describe each clearly rather than squeezing everything into one broad label.

Turn readiness into small, manageable jobs

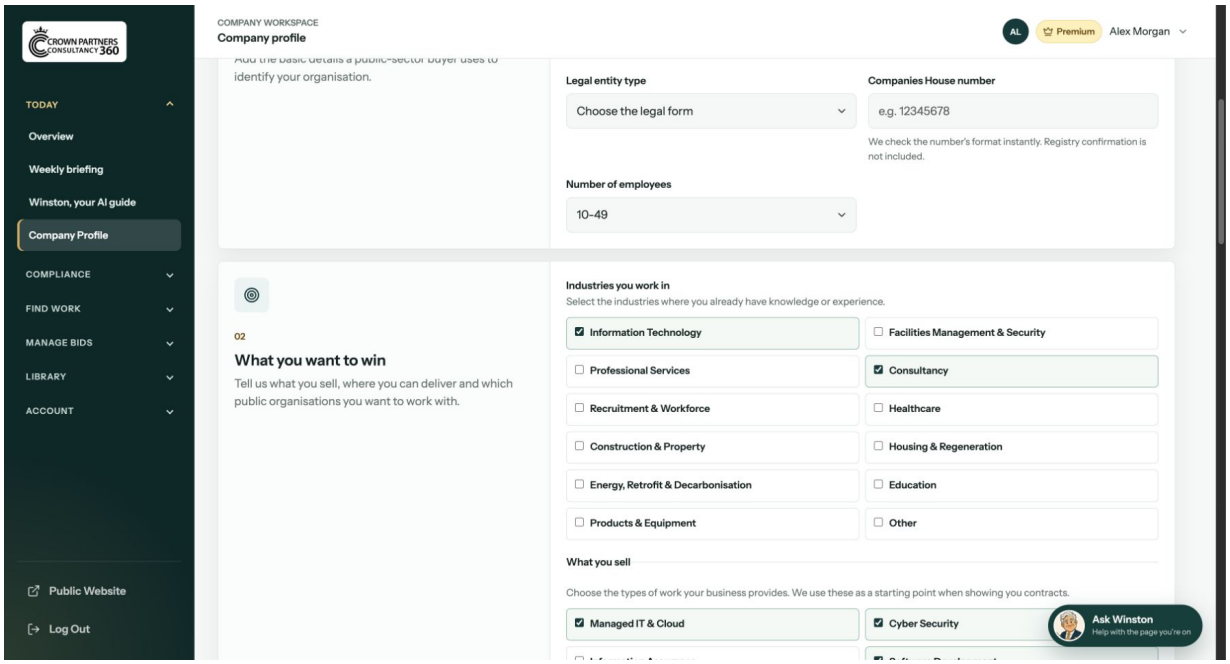
Open **Readiness** and work through the topics that apply to your business. Read the question help, record what you have and connect supporting evidence where offered. Use the results to decide what to tackle next.

Try this: Pick one gap you can make progress on today. Find the document, check the detail or ask the right colleague. You don't have to finish the whole assessment in one sitting.

Your workspace, on screen



Overview brings your next steps together. Use the left menu to move between areas.



Company Profile: choose the industries, services and delivery regions that describe your business.

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Bring your evidence together

Certificates, policies and examples of previous work are much easier to use when you can find the right version.

Add documents to your Evidence Library

1. Open **Evidence Library** and choose the file you want to add. Check the file types and size limits shown on the form.
2. Use a recognisable filename before uploading, such as 'Public liability insurance - expires June 2027.pdf'. Add a note to explain what it contains.
3. Link it to the relevant readiness questions, or leave it unassigned while you decide where it belongs.
4. Confirm that you are authorised to upload the file, then choose **Encrypt and add**. Check that it appears in your library.

Record work you can talk about

Open **Previous Work** and add a project you've delivered. Explain what the customer needed, what your business did and what changed as a result. Include measurable results where you have records to support them.

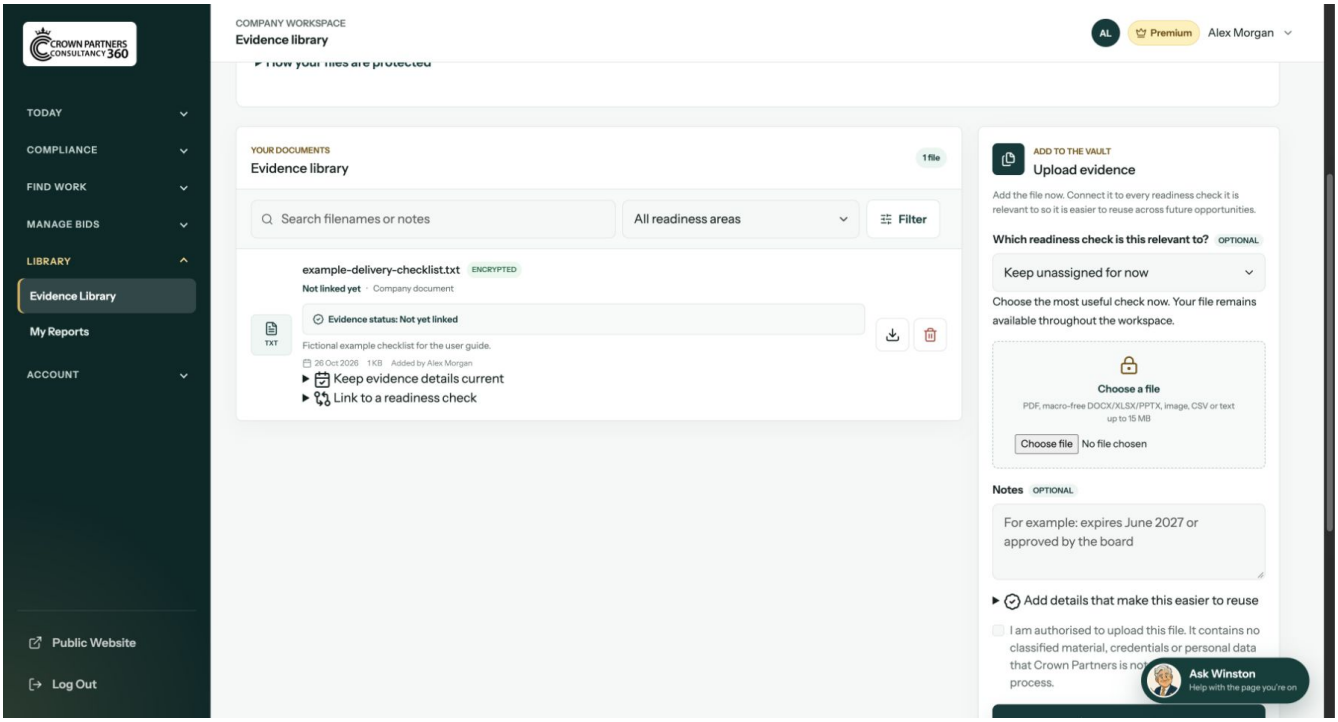
A relevant private-sector project can be useful too, unless a buyer specifically asks for public-sector experience. The aim is to help someone understand what you can deliver.

Create a short introduction to your business

In **Capability Packs**, review your business overview, services and contact details. Choose the available case studies and evidence you want to include, then select **Create my capability pack**. Review the document before downloading or sharing it.

A small habit that helps: Check expiry dates and remove personal details a buyer doesn't need. Uploading a file stores it; it doesn't confirm that the document satisfies a tender requirement.

Your evidence, on screen



A real upload in the example account: the delivery checklist is saved and ready to link to a readiness check.

What to look for

1. Search by filename or notes when your library grows.

2. Open Link to a readiness check on the saved file to connect it to the right topic.

3. Add another document using Upload evidence. The file in this example is a fictional checklist, not a certificate.

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Prepare your company plans

Use the builders when you need them. Start with information you can support, and keep the wording true to how your business works.

Carbon Reduction Plan

1. Open **Carbon Reduction Plan** and choose a supported reporting year.
2. Complete the activity questions using your records and the units shown. Keep estimates clearly identified.
3. Review the calculated footprint and your reduction actions. Check the required company declarations before using the available download action.

Keep the records behind your figures so you can explain them later. If a download isn't available, the review panel will point you towards information that still needs attention.

Social Value Plan

Social value means the wider benefits your work can bring, such as training, local employment or support for communities.

Open **Social Value Plan**. Start with **About**, then work through **Check-in**, **Priorities**, **Actions** and **Review**. Choose commitments you can deliver and record achievements you can support. Check the save confirmation as you work, then review any remaining actions before downloading the available document.

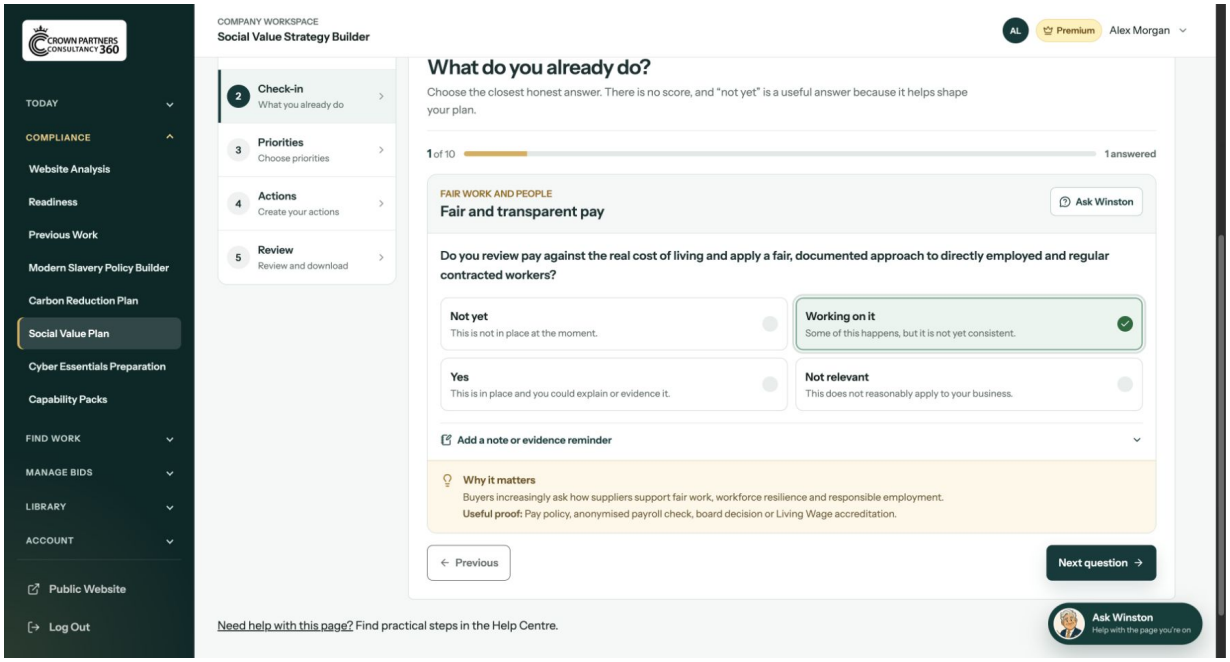
Modern Slavery Policy Builder

Open **Modern Slavery Policy Builder**. Describe who the policy covers, how you work with suppliers, how people can raise concerns and how you'll respond. Add an owner and review date, then choose **Save policy draft**.

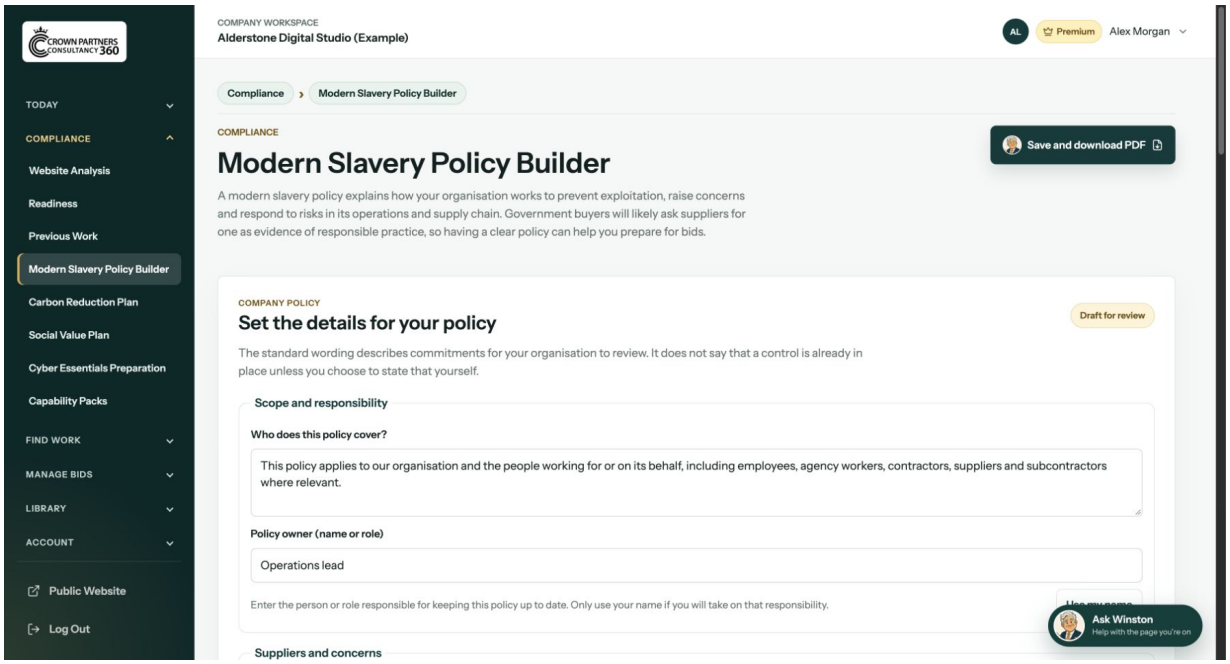
The preview shows your saved wording. Only confirm that the policy has been adopted when that's true for your organisation. Use **Save and download PDF** when you're ready to create a copy.

> **Keep it realistic:** A modest commitment you can deliver is more useful than an impressive promise you can't. Check each buyer's instructions before reusing a company plan in a bid.

Your plans, on screen



Social Value check-in: Working on it is a valid starting point. Use the steps on the left to move towards priorities, actions and review.



The policy builder keeps your form and saved preview together. This example remains a draft; it has not been adopted.

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Check what buyers can see

Your public website and your supporting records tell different parts of your story. These tools help you check both.

Review your website

1. Open **Website Analysis**, check your website address and start the scan.

2. Read the findings and any notes about pages the checker could not access.

3. Improve useful information on your website, then run a new scan to check the updated pages.

If something wasn't found, it may be missing from the pages checked rather than missing from your business. A page behind a sign-in can't be read as a public page. Previous scans remain a record of what was checked at the time.

Prepare for Cyber Essentials

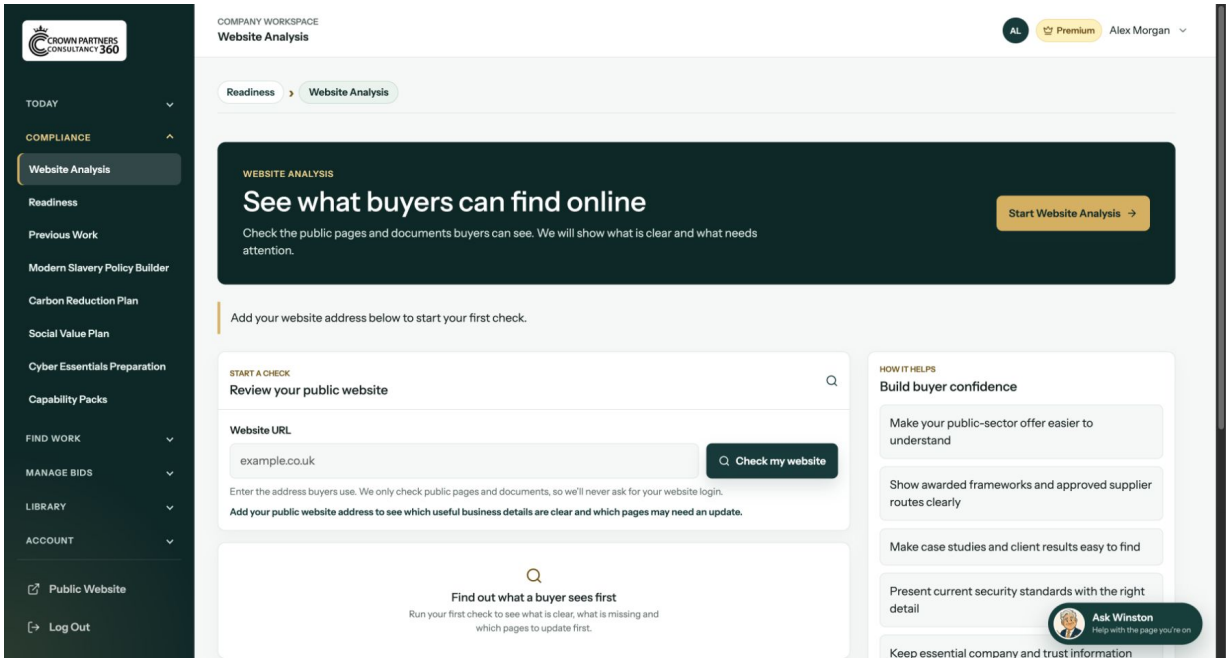
If **Cyber Essentials Preparation** is available in your account, open it from **Compliance**. Start by describing your organisation, the IT systems covered and groups of devices with the same setup.

Work through the questions you can answer. For technical details, use **Ask my IT provider** or download the provider questionnaire. When the completed questionnaire comes back, upload it, review the proposed answers and confirm the import.

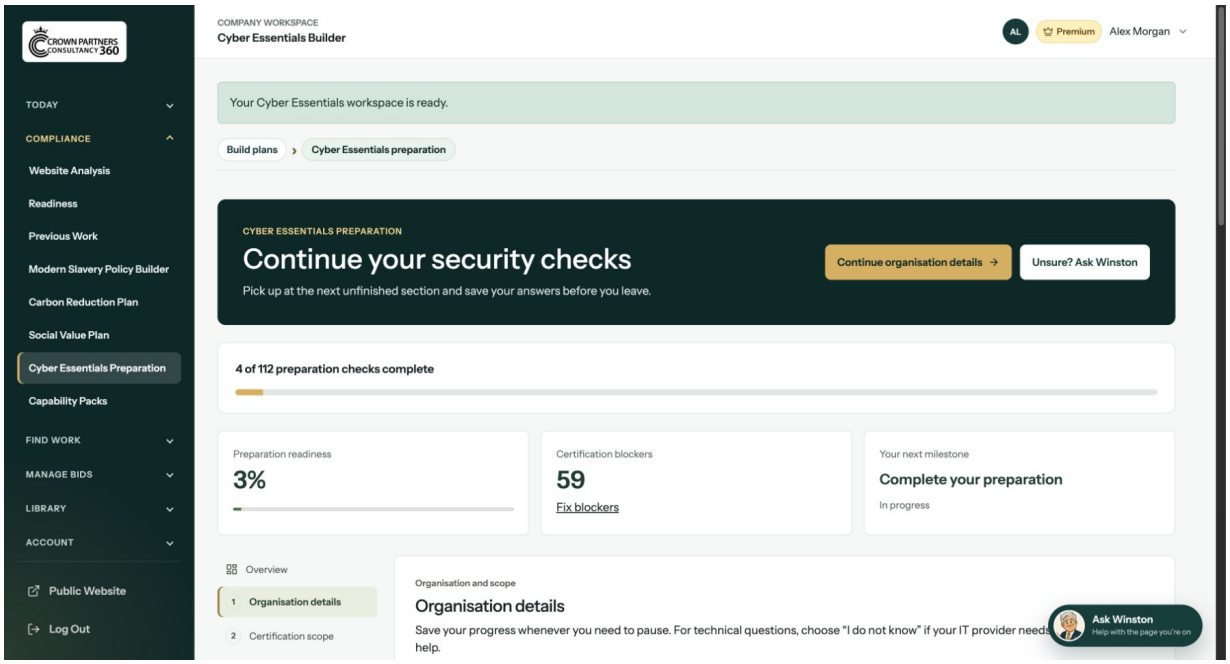
Use **Remediation actions** to track fixes and attach evidence. Then open **Final readiness review** to see what's left. Follow **Certification handover** when your preparation pack is ready, and record the certificate details once certification is awarded.

Before you send anything: Downloading a preparation pack doesn't send it to a Certification Body. You arrange the handover yourself. The Certification Body awards certification; Crown 360 helps you prepare.

Your checks, on screen



Website Analysis before the first scan. Enter your public website address, then choose Check my website.



A newly started Cyber Essentials workspace. The section links guide you from organisation details through evidence and handover.

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Find work worth a closer look

You don't need to chase every notice. Look for work that fits your services, capacity and delivery area.

Start with your matches

1. Open **Contracts** and choose **Matched to my business**. Use **All opportunities** when you want to browse more widely.
2. Open an opportunity and read why it may fit, along with the points you still need to check.
3. Follow the link to the buyer's notice and documents. Confirm the work, location, requirements, deadline and submission instructions.
4. Shortlist it if it deserves another look. When you decide to work on a response, open a Bid Workspace where available.

New or updated profiles may need time to produce matches. You can browse **All opportunities** while you wait. If the completed results aren't useful, revisit your services, regions and filters.

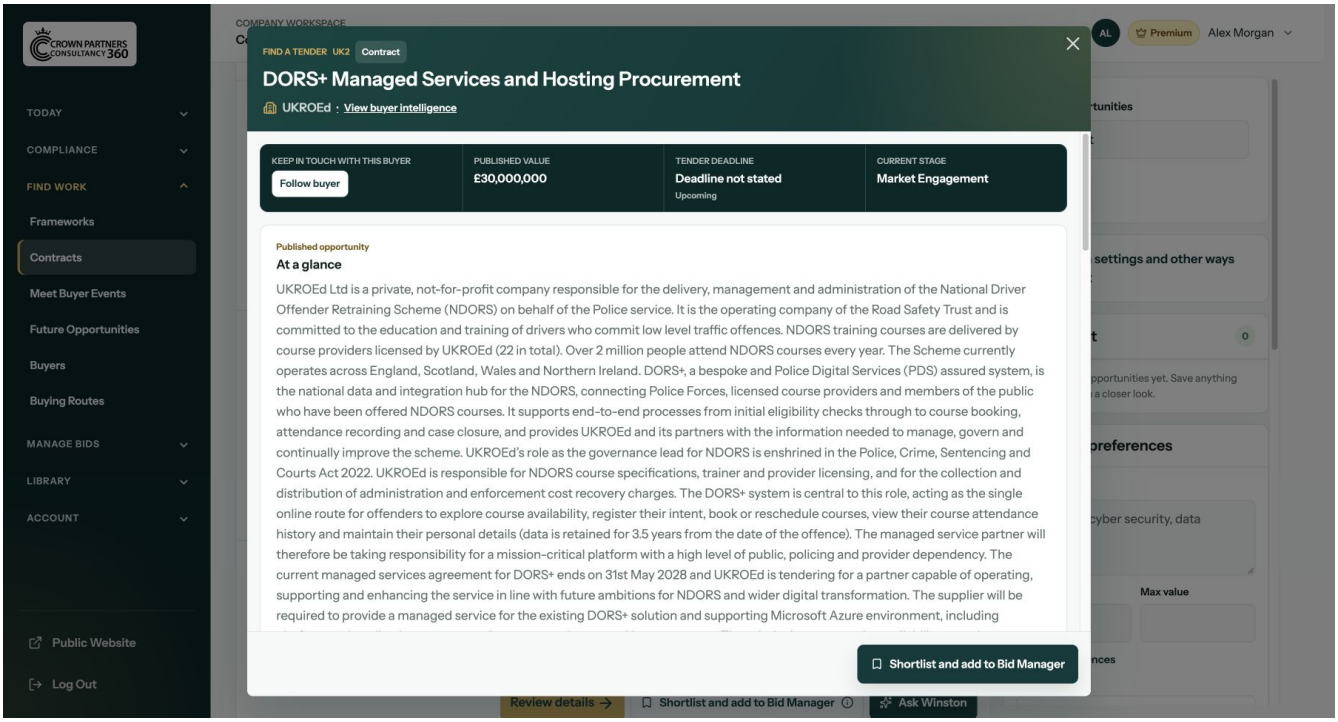
Look a little further ahead

Use **Future Opportunities** to explore earlier purchasing plans. **Frameworks** and **Buying Routes** help you explore other ways buyers arrange work. Check each notice's entry rules and dates before deciding to pursue it.

In **Buyers**, follow a public organisation by its full published name. You can keep private company notes and record a next step, such as checking its next supplier event.

Before you put time into a bid: Check which deadline applies, including any separate deadline for a lot - a defined part of a larger contract. A match isn't confirmation that you qualify, and a saved shortlist entry may still be visible after it closes.

An opportunity, on screen



Opening a notice brings up its buyer, published value, stage and deadline information. This example is at Market Engagement stage.

What to look for

1. Read the stage and deadline together. Deadline not stated means you still need to check the source.

2. Scroll within the detail panel to reach the supporting information and official notice link.

3. Shortlist and add to Bid Manager saves the notice for a closer look. It does not submit a bid.

4. Published values may cover several years or suppliers. They are not revenue promised to your business.

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Get help, then build your bid

Winston is Crown 360's AI guide. Use him to explain an unfamiliar question, organise your thinking or help develop a draft.

Ask Winston a specific question

Open Winston from your workspace, or choose **Ask Winston** beside a question where it's offered. Try: 'Explain what this buyer is asking for, then list the evidence I should gather.'

Your company owner can manage access to saved information and uploaded files in **Winston settings**. Read the permission wording before allowing company workspace access; it includes future saved work and uploads. Save your changes before asking about them, then check the answer, its references and any commitments before using the wording.

Bring the response into a Bid Workspace

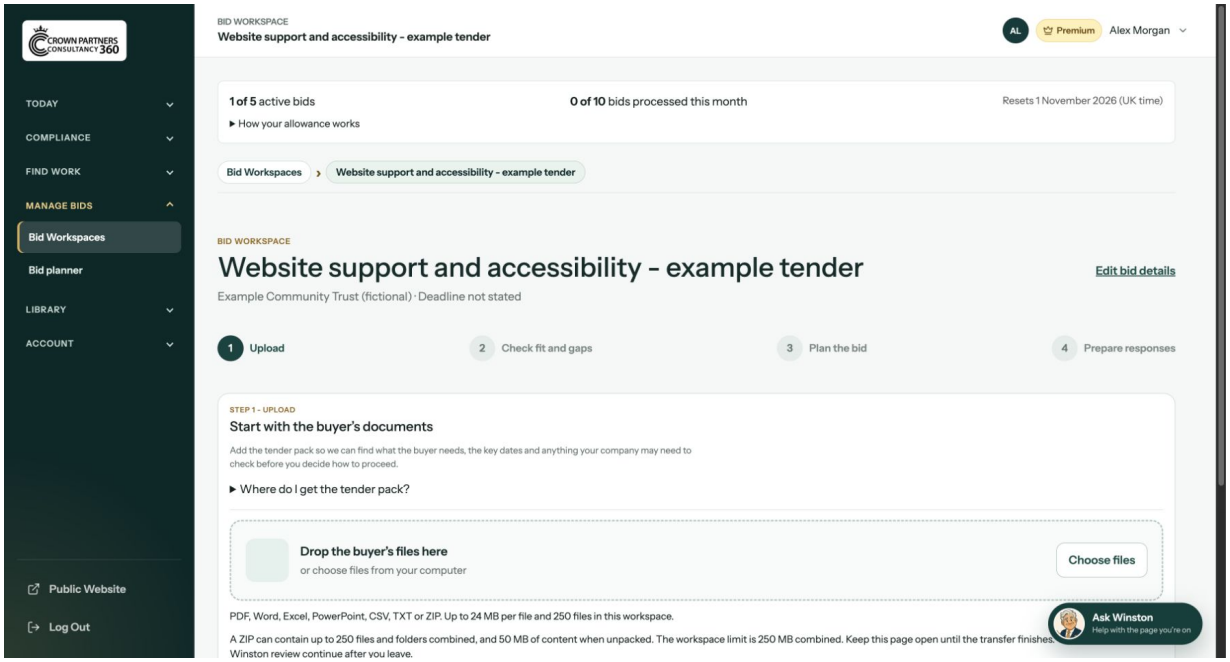
1. Where **Bid Workspaces** is available, start from an opportunity or enter the tender details using the workspace form. Confirm the deadline and timezone.
2. At **Upload**, choose the buyer documents and review the AI permission request. Keep the page open until the transfer finishes. Check the extracted requirements against the originals before moving through **Check fit and gaps**, **Plan the bid** and **Prepare responses**.
3. Build your answers using relevant evidence and Winston proposals. Save a selected proposal as a draft where offered, then edit it in your own words.
4. Review the response and any unresolved questions. Use the available Word or PDF download actions to create a copy for review.

After you approve a response version, **Save for future bids** lets you keep it for reuse. In another workspace, choose **Start from a saved company answer** when it's relevant. Check dates, names and promises each time.

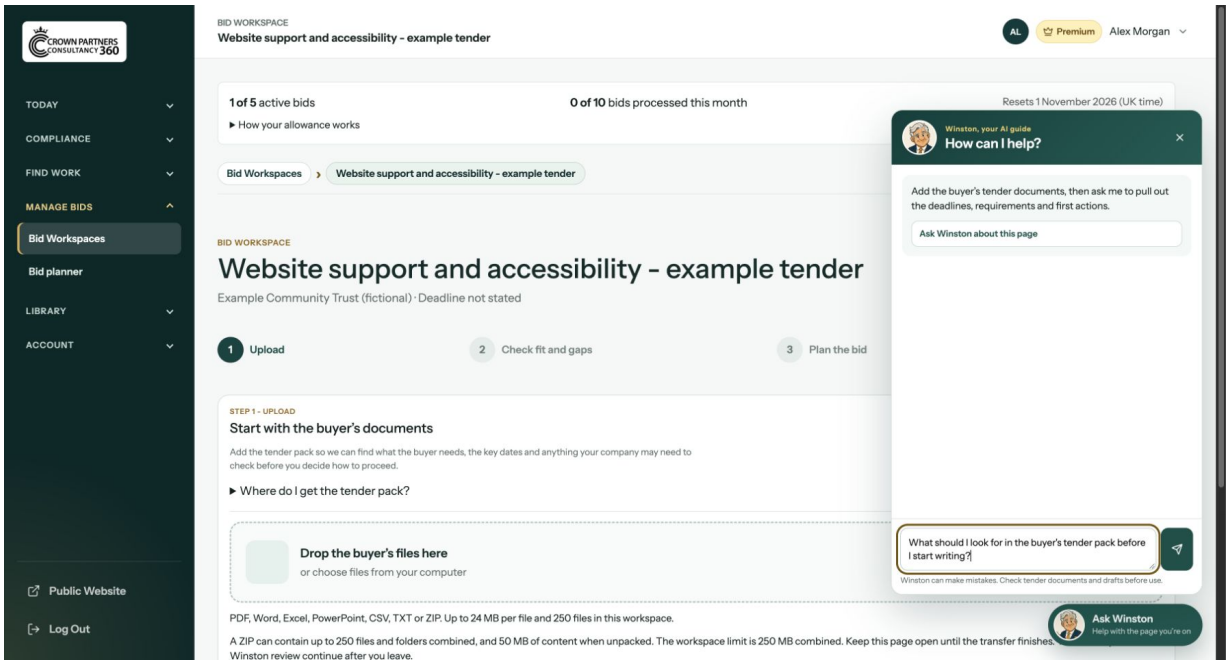
Use **Bid planner**, where available, to review upcoming deadlines and tasks across your workspaces.

Don't miss the last step: Downloading a response doesn't submit your bid. Follow the buyer's submission process and check that you receive the confirmation it provides.

Your bid, on screen



The example tender starts at Upload. The four steps show the route towards preparing responses.



Ask Winston opens a question panel beside your work. This screenshot shows an example question before it is sent.

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Choose your next level of support

Your free results may be enough to get you moving. If you'd like more help, there are two different next steps.

Get a Detailed Gap Analysis Report

This is a separate one-off purchase that turns your assessment into an ordered preparation plan. It isn't the same as a subscription.

1. Complete the Free Gap Analysis, then open **My Reports** or your free summary.
2. Check the report price and the company details shown before continuing to checkout.
3. Return to **My Reports** to see its status. You'll be emailed when it's ready, and you can download the PDF there.

The report uses the details captured for that edition. Later profile changes don't rewrite it. Your purchased report remains available independently of a Premium subscription.

Use the tools on an ongoing basis

A subscription gives you the workspace tools and opportunity matching so you can keep preparing, finding work and reusing useful material.

Premium: One named user.

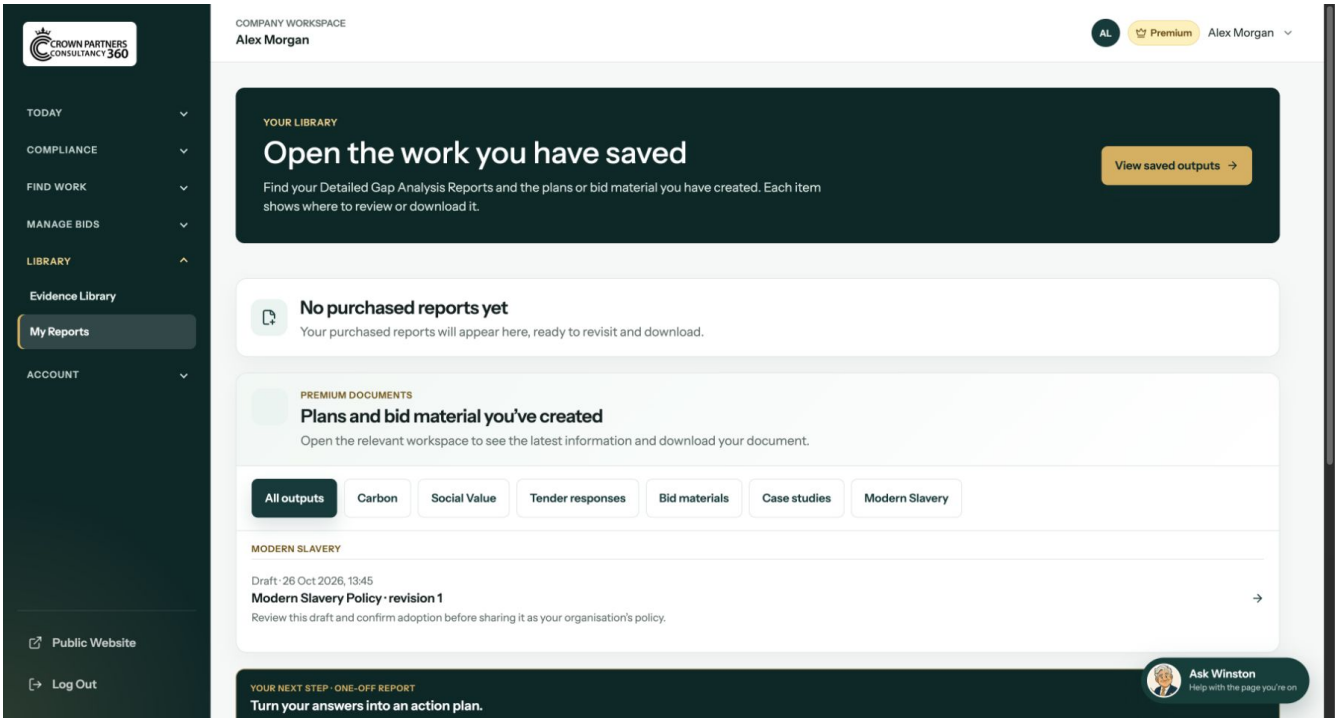
Platinum: Up to five named users, including the owner.

Platinum Partner: Unlimited named users, with consultancy support available on request.

Check the current plan details, price, usage allowances and terms before choosing. If you select an introductory offer, read both the initial payment and what happens when that period ends.

Already paid for a report? If it's still being prepared, check its status rather than buying it again. If the page asks you to contact support, include the report link and approximate purchase time.

Your documents, on screen



My Reports separates purchased reports from company plans and bid material. A saved Modern Slavery Policy draft appears in this example.

What to look for

1. Use the output filters to find a particular type of document.

2. Open the saved document entry to revisit it. A draft still needs your review before you use it.

3. No purchased reports yet simply means this example account has not bought a Detailed Gap Analysis Report.

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Keep things moving

Once the basics are in place, a short, regular check-in can help you keep your information useful and your next steps clear.

Make a simple return-visit routine

Start at **Overview** or your **Weekly briefing**. Check new matches, revisit a shortlisted opportunity and look at approaching bid deadlines. Then choose one preparation task to move forward.

When something changes in your business, update the relevant information: a renewed certificate, a completed project, a new service or a wider delivery area. That's how your saved work stays useful.

Choose the emails you want

Open your account menu and choose **Mail settings**, or use **Email preferences** in the navigation. Select the optional emails you want and choose **Save email choices**. Switching an email off doesn't remove the work from your account. Security and billing messages still arrive.

Manage your account

Use **Subscription and billing** to review your plan and the available change or cancellation options. Read the effective date and terms shown before confirming a change.

Open **Security** to manage the security options shown and request a company data export. If your plan includes team access, the owner can use **Team** to manage named users. Keep passwords and sign-in codes to yourself.

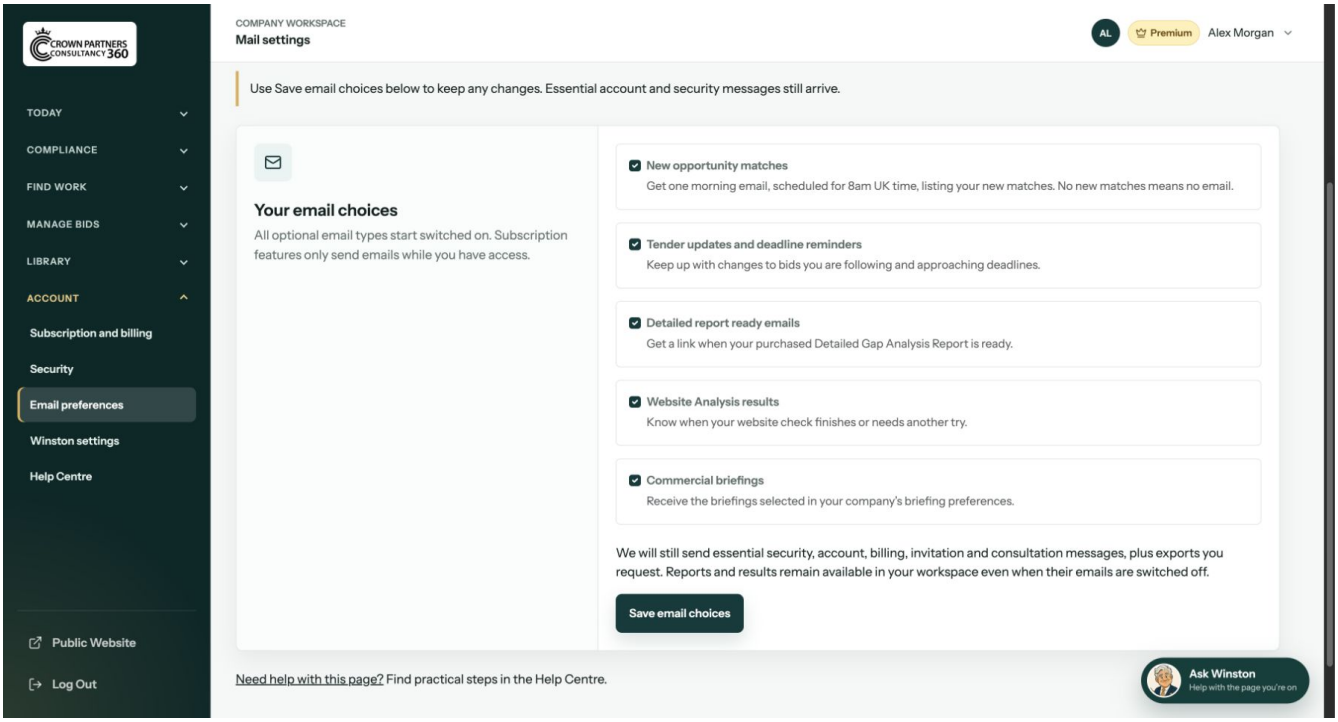
If something gets stuck

For a saving error, keep the page open and follow the message beside the affected field. If another tab changed the same information, check the latest saved version before trying again.

Open **Help Centre**, or **Need help with this page?** where shown, for guidance on the task you're doing. If you contact support, explain what you were trying to do, the page you were on and the message you saw. Leave out passwords, sign-in codes and payment card details.

Your first step can be small. Answer one assessment section, find one useful document or review one relevant opportunity. Save your progress, and pick it up from there.

Your email choices, on screen



Email preferences lets each named user choose their optional updates. Your account menu also gives access to billing, security and help.

What to look for

1. Keep the updates that help you act, and clear the options you do not need.

2. Select Save email choices at the bottom of the form to keep changes.

3. Essential account and security messages still arrive. Switching off an email does not remove saved work.

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