

ASPREY MANAGEMENT SOLUTIONS

# SERVICE DEFINITION

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DEMAND BETTER, EXPECT MORE



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## 1 INTRODUCTION

Asprey Solutions was formed in 2002 on behalf of its partnering organisation, the Building Research Establishment's subsidiary, BPG, to employ the surveyors and IT authors of the Estatepro asset management business.

The founding aim of Asprey's product and services offering is to be foremost in the ethical and professional delivery of asset portfolio management advice, products and assistance within the UK. We are a fully independent provider of asset portfolio management solutions and advice, active for more than 15 years in the social housing sector.

The Asprey Suite evolves with the skills and experience of Asprey's asset management, IT and financial strategy specialists. We offer a comprehensive range of strategic and operational management modules for modern social housing landlords, satisfying the ever-increasing demands of regulatory, best practice and best value agendas

Differentiating Asprey from other asset management system providers, is both our low cost base (reducing your product lifecycle costs) and the availability of an optional range of sector focussed business intelligence, business consultancy and data management services from our highly experienced team. Information management consultancy, survey design, sophisticated financial analytics, practical asset management advice and state of the art software delivered as connected thinking. This corporate body of asset management knowledge is readily and economically available to clients.

We codify and publish our practices and views on practices in areas such as Decent Homes and other housing standards, through speakers and publications, both as evidence of our commitment to transferring skills to our clients and to ensure that we maintain an homogenous approach by all our people so that we can flex our consulting strength readily as needs arise.

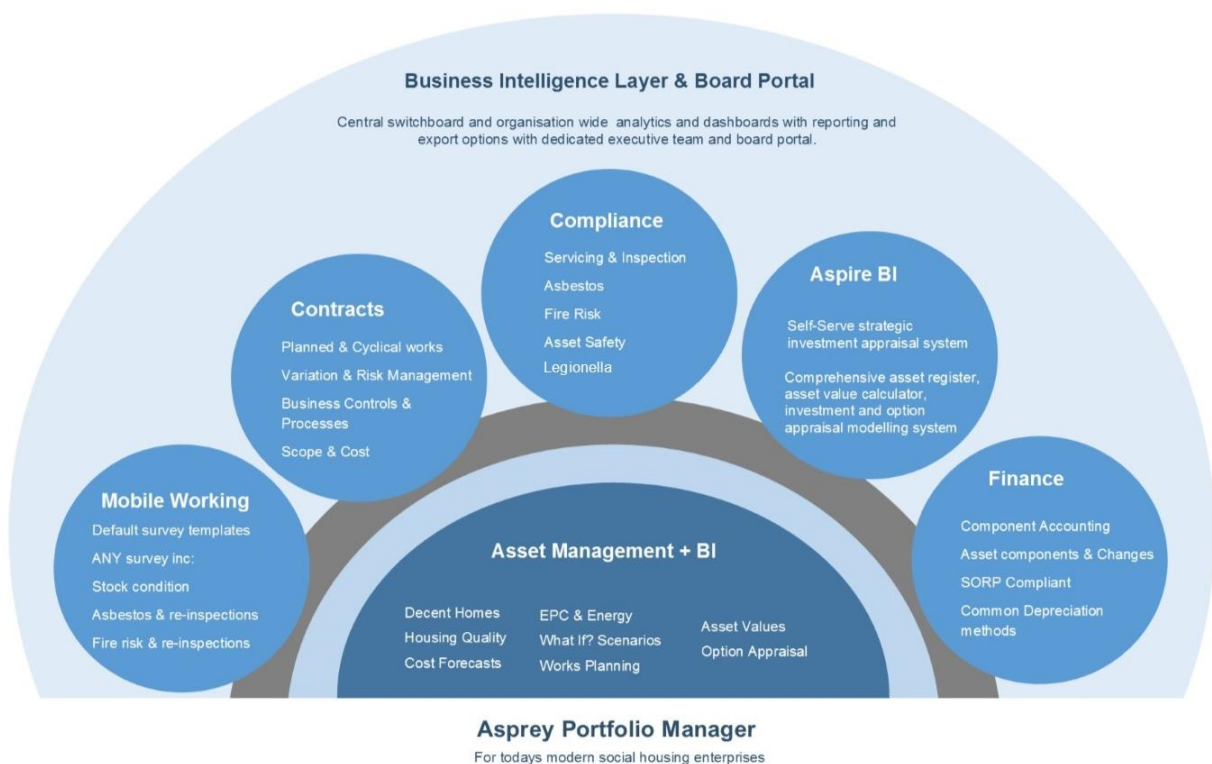
The best testament to the effectiveness of the 'Asprey approach' and commitment to achieving clients' objectives is Asprey's on-going relationship with clients and recurring business consultancy.

## 2 THE ASPREY ASSET PORTFOLIO MANAGER

The Asprey Asset Portfolio Manager solution provides a wide range of extensive, flexible, fully integrated modules, with a consistent look and feel, to manage all the key processes required by today's modern social housing enterprises.

Coupled with a powerful web-based Business Intelligence and Reporting layer, access to information and data has never been so easy. Ease of use and data maintenance, real time updates, automation and enterprise wide transparency of information and data are key designs:

The Asprey suite is comprised of:



Our cost effective offering ensures your organisation is afforded the best industry specific, best practise advice available from our corporate wealth of knowledge and experience. Alongside our optional extensive training offers, support and advisory services, we ensure an entire tailored solution is provided to our clients. The suite is available as a single solution or a mix of integrated features to meet specific needs.

Benefits of the asset management and compliance suite include:

- Demonstrably proper asset custodianship
- Intuitive and user friendly asset management tools with comprehensive functionality tailored to increasing sector sophistication, ensuring efficiency gains across user organisations.
- Flexibility to meet existing business process demands and/or provide transformational assistance at implementations in terms of business processes, with innovative solutions to new demands
- On screen visualisation of complex data
- Simple and ready access to macro and micro data with import and export functions
- Data management economies (single point data entry and reuse)
- Maintain forecasting integrity (annual core system data health check)
- Meet emerging integration and interfacing needs
- Solutions for effective management of all asset management areas, plus provision of value added supporting functions and optional further services (one stop shop for asset management needs).

Asprey offers superior products dedicated to evolving asset management and compliance needs, rather than compromising asset management requirements to wider systems. With our broad yet focussed functionality, usability and cost benefits, our client organisations benefit from solutions tailored to maximising the financial and strategic value of their assets,

## 3 ONBOARDING AND OFFBOARDING

### 3.1 ONBOARDING

The Asprey Asset Portfolio Manager solution can be made available within 24 hours of order. Login details will be provided and access granted to the modules purchased. The chosen modules will be provided with a basic configuration that your users can then adapt and then populate as required.

All suite modules are highly configurable to meet different operational and strategic business needs. This flexibility ensures that existing business processes can be readily accommodated, whilst, in addition, effective introduction of the integrated asset management suite can be transformational in terms of unprecedented levels and quality of macro and micro level information, leading to improved decision-making, business processes and business efficiencies plus economies of data management.

For this reason, we offer a number of onboarding services (please refer to our pricing document for further information) which ensure that Asprey's wealth of asset management experience and expertise, plus solutions architecture, business process, change management and financial modelling knowledge is brought to bear on all implementations, minimising customer efforts and maximising skills & knowledge transfer, not limited to:

### 3.1.1 NO OBLIGATION DEMONSTRATIONS

Asprey understand that buying a new IT system can be a big decision for an organisation. For this reason, Asprey can attend a meeting FOC to demonstrate the modules of interest so that key personnel can assess the quality of our offering. It should be noted that Asprey do not operate with a dedicated pre-sales or sales team, meaning that you will have the opportunity to meet the technical and business experts that would be involved in any project should our implementation services be considered, before a purchase decision is made.

### 3.1.2 IMPLEMENTATION SERVICES

Asprey follows a proven project management and implementation methodology which is a tailored adaptation of PRINCE2. This formal approach to implementing any element of our suite and our optional range of consultancy services is aimed at tailoring overall data management in line with each user's requirements. The basic implementation steps are:

- Implementation workshops
- System configuration
- Analysis of population data (where relevant)
- Data cleansing with client (where relevant)
- System population
- Baseline/pre-delivery meetings with client
- Delivery
- Training

We strongly believe that implementation of our products must include both software and knowledge transfer because without the latter, software cannot create long-term improvement.

Rather than demanding extensive information requirements planning and information gathering exercises of customers before implementation, we ensure that clients become accustomed to the overall issues by a swift implementation of systems based upon available data. The data available for this implementation population is agreed during initial implementation workshop sessions.

Together with our consultants, clients can then assess the level to which they want and need to refine their own data and systems surrounding the suite in an informed manner.

Our consulting services aim to revisit each of the following standard implementation steps and leave a continuous improvement process for the user.

### 3.1.3 CLASSROOM TRAINING

Training is a key part of our approach and we have developed a number of post-delivery workshops with our existing clients aimed at the key areas of functionality that allow users to develop the necessary skills to get the best out of the system. These courses are delivered by our professional training team. As part of the implementation documentation, clients are left with comprehensive training manuals, including all workshop sessions.

Each training course is subject to a maximum of six attendees to ensure thorough knowledge transfer.

Initially, our aim is to achieve customer independence in product use but we then provide many other services to supplement a customer's data management teams and help bring innovation to works planning and data maintenance aimed at driving down costs of asset management and increasing its effectiveness.

Following the training provided within the implementation process, an advisory service is available from the Asprey helpdesk. As part of internal helpdesk reports, a training needs analysis is undertaken and reported regularly to each client. Should additional training be required post implementation, Asprey would quote separately, but this would be based on our normal consultancy rate.

All training would be provided on customer site. A dedicated consultant will manage the relationship and ensure that our service levels flex to meet customer needs. Our services vary with our clients and reflect their own characteristics and in the event that additional specific technical or business training is required, it can be made readily available.

### 3.1.4 ACCOUNT MANAGEMENT

Asprey will provide a dedicated account manager, with a wealth of asset management and compliance related experience who has experienced implementations and provided on-going account management services for all sizes of organisations with varying levels of complex requirements and advisory needs.

Being actively involved in the implementation from initial demonstrations, attendance at key meetings/workshops, post go-live meetings, and working closely with our dedicated project manager they will have a detailed understanding of the contract agreed with your organisation.

Asprey works in partnership with its clients from the outset. Along with ensuring that any issues that might be raised are adequately managed to your satisfaction, your account manager is responsible for:

- Supporting all your staff through the process and transferring best practice knowledge.
- Learning about your organisation and data in order to fully optimise module functionality and product capabilities.
- Working actively with your organisation and other suppliers/consultants to provide you with information and advice re systems and business that will improve your organisations asset management processes (as required)
- Dealing with any complaints that are not managed via our standard support escalation procedures

Post-delivery Asprey undertake regular account management meetings with clients (these can be flexed to suit requirements), and full meeting notes and any resulting action plans are always fully and formally reported back. Our account managers look to be actively involved in your business and as familiar with your business needs to ensure we offer you the best advisory and support service possible. Asprey clients value the corporate continuity of familiarity with their asset management business and systems, particularly during periods of key staff changes. Asprey has also in the past seconded asset and data managers to meet client temporary needs.

### 3.1.5 CLIENT PARTICIPATION

Asprey re-invests its profits in continued R+D for both existing products and services as well as new functions, products and services to benefit its client base. Being sector and client driven in terms of development Asprey involves its client base in innovations and prioritising new functionality in a number of ways:

- Asprey's partnership method of working with clients, supported by both account managers and consultants ensures that environmental scanning and client requirements are regularly fed back to our development planning process.
- Asprey works with an extensive network of contacts and specialist organisations. For instance, asbestos surveyors were involved extensively in the design and development of relevant products, whilst relevant legislation was monitored and interpreted in house.
- Asprey involves, through its formal personal development system, all employees in environmental scanning activities, with certain individuals covering specialist activities. For instance, this has involved specialist training in fire risk assessments, accounting, and energy data and assessments, for instance. The owner/managers undertake continuous monitoring of the corporate scanning activities through sector literature, conference attendance, day to day contact across the client base and contact networks and monitor web sites of government and other bodies in specialist areas.
- Active involvement of consultants with expert organisations through client partnership working
- Clients have the opportunity to influence Asprey's development path at regular user group meetings where new products and functionality in development are showcased
- Asprey also involves key clients in requirement capture for new functions by providing them with a discounted rate on such developments or foc.

## 3.2 OFFBOARDING

The system can be switched off at a time appropriate for the client and all data is retained by the client and not Asprey Solutions.

Following notification of service termination, a plan will be agreed including data extract requirements and service end date.

Following the service end date all client data and backups will be deleted.

Support for data extraction using standard product export functionality will be provided. Customised data extraction services can be provided on a time and materials basis or a fixed price quotation.



## 4 PRICING OVERVIEW

The Asprey Asset Portfolio Manager Solution is priced on an annual rental basis per module and it based on the number of assets under management when purchased. Details of our pricing, including bulk purchase discount arrangements can be found in our pricing document.

### Key Considerations when undertaking a price comparison

- Asprey aim to ensure that our pricing is transparent and clear to help you make the appropriate functional choices whilst understanding that you have budgetary considerations.
- **No hidden costs** – Our pricing reflects the number of assets managed by your organisation when the Solution is purchased. There is no minimum licence and there are no hidden charges should your organisation add to its property portfolio. Therefore, we do not offer escalating per asset pricing.
- **No hidden costs** – Regardless of modules chosen, Asprey provides the Solution with a Site Licence. This means that there are no hidden charges for additional users.
- **Unlimited user support** – given the range of potential users within your organisation, our support is not limited to a number of users. Anyone using the system can contact our helpdesk for assistance. This option however is only available to users who have had formal classroom training from the Asprey training team. Annual support coverage is subject to our SLA's.
- **No contract tie in** - Asprey do not force long contract terms to maintain annual fees. The initial licence is for a minimum term of 12 months with a simple annual renewal.
- **Commercial Flexibility** – The annual rental fee can be paid monthly, quarterly or annually, depending on your preference.
- **Interfacing Freedom** – Any module from the suite is provided with API's (these are included within the above costs), which means that you or your IT team have the freedom link this solution to any existing system your organisation utilises.

## 5 SERVICE LEVELS

If Asprey implementation services are utilised, Asprey take the majority of technical issues and much of the physical work aspects (such as completing data templates etc.) on board during the implementation process, hence the amount of support during the implementation process should be minimal. The Asprey lead consultant however, will be available throughout the implementation process to provide assistance and support where required by the client.

Product user guides are provided on line as part of the software package. Product help files can be accessed by the user on screen and this is updated with frequently asked questions to our helpdesk (if they are not already covered in the file). The help file is updated to clients to include the above and new functionality cover with every version release.

Post go live, Asprey Solutions operates a dedicated helpdesk for product users, manned by its own support and consulting staff, which is based at Asprey's HQ in the Midlands and is made available to named client personnel that have undergone product training. There is currently no limitation on the level of support services provided within the annual maintenance cost.

### 5.1 RESPONSE AND RESOLUTION TIMES

The Asprey helpdesk is provided between the hours of 08:30 and 17:30 each day excluding Public Holidays and weekends. Users can log support calls either on-line, by phone or by email. A typical service level agreement is detailed below:

Enquiry	Description	Priority	Response Time	Resolution Time
System Down	System is 100% unavailable either from a technical or business perspective.	One	Within 2 hours	Within 2 working hours or such longer period as the client agrees or specifies.
Live system element is broken	System is functioning but one or more users are unable to perform tasks on the system	Two	Within 4 hours	Within 3 working days or such longer period as the client agrees or specifies
Any other matter logged by e-mail to the Response Centre	This is deemed to be a minor problem you can continue working with and is not related to a systems failure.	Three	Within 6 hours	Within 5 Working days or such longer period as the client agrees or specifies

## 5.2 ADDITIONAL SUPPORT SERVICES

In addition to the Asprey Helpdesk for technical support queries, Asprey also provides an advisory and explanatory service via e-mail, to be provided between the hours of 08:30 and 17:30 each day excluding Public Holidays and weekends. This service will be provided free of charge to users who have attended formal product training courses. Asprey Management Solutions will make all reasonable attempts to answer advice queries in a timely manner, but this service will not be subject to any service level arrangements. The advisory and explanatory service is provided to users of the Software who have not attended the appropriate level of training, subject to Asprey consultancy charge rates.

## 6 ORDERING AND INVOICING PROCESS

Orders can be placed either by using the on-line GCloud order form, or by contacting our office on 01564 771600 and speaking to any of our representatives. We will require a Purchase order number from your organisation if this is required by your finance department.

Annual Rental can be paid monthly, quarterly or annually depending on your preference.

Onboarding services (such as implementation) can be billed monthly or as agreed depending on your preference

Expenses (usually just travel expenses to and from client premises) are billed at the end of each month only for expenses incurred.

## 7 TECHNICAL REQUIREMENTS

As a fully hosted solution the Asprey Asset Portfolio Manager suite will operate on most common infrastructures including virtualised desktop environments such as Citrix.

The minimum specification for end user workstations is as follows:

- Any modern operating system (i.e. Windows, Linux, macOS)
- 2GB RAM
- 40GB HDD
- Screen display 1024x768 or higher
- A web browser
- An internet connection
- Microsoft Office 2013 (or equivalent productivity suite) for exporting and ad-hoc reporting (optional)

The minimum specification for end user device for mobile data collection is as follows:

- Windows 10
- 2GB RAM
- 32GB HDD
- WIFI
- Screen display 1024x768 or higher

Full system requirements for an on premise solution can be provided upon request.