Assure Behavioural Management

Service Overview

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1. Overview of Assure Behavioural Management

Safety and more specifically safety management, should be proactive not reactive. Most people see safety as being primarily concerned with the personal well-being of stakeholders, meaning all those involved, not just the immediate actors and owners. Some also add the integrity of the business and its assets.

Using this module, customers can design a behavioural management solution to match their exact requirements. Individual forms are highly configurable. Any organisational structure can be accommodated. Workflow can be customised with email alerts (e.g., based on severity, type, organisation unit, etc.) and actions assigned, managed and escalated using user configurable tools. Dashboards, customisable for each user, present snapshot live information, while comprehensive inbuilt reports can be configured to customer requirements or data tables extracted directly by external reporting tools.

Assure places all of these configuration tools in customer hands through a simple, intuitive and user friendly interface.

With a suite of reports and graphs for comparison, analysis and evaluation, the system will highlight areas of success and improvement as well as new areas to target. Involving the entire workforce is easy and using the Assure Portal Module (available separately) any member of staff can complete a safe/unsafe observation report or an audit. Multi-browser compatibility and tablet and mobile apps enable on-site completion, whether online or offline.

- *Aid transition to pro-active/generative safety culture*
- *Configurable to fit your safety culture strategy*
- *Involve the entire workforce*
- *Link to contractor management*
- *Benchmark current status, track improvement and demonstrate progress*
- *Report information consistently*
- *Tablet and mobile device enabled immediate reporting of observations*
- *Comprehensive reporting*

Record safe and unsafe observations through pre-configured templates or edit/create your own audits. Include the whole workforce in the process through the Safe and Unsafe Observation Reports.

In common with other Assure modules, users benefit from the potential to integrate Behavioural

Management with other modules to create a complete health and safety management solution; from free regular seamless updates to add functionality or meet latest legislative requirements; and from our comprehensive and friendly support.

2. Security

SHE Software provides the highest levels of security, availability, responsive support and scalability.

Network security threats from Internet-born worms and viruses, internal data loss, natural disasters and terror related incidents pose a serious threat to any organisation storing data electronically.

We take these threats very seriously: the security of sensitive company data is central to our approach and for this purpose we use Amazon Web Services (AWS) where cloud security is the highest priority.

The AWS infrastructure puts strong safeguards in place to protect customer data and privacy. All data is stored in highly secure AWS data centres which meet ISO/IEC 27001:2013.

3. On-Boarding Process

We understand that buying software can be the easy part - value comes through getting that software adopted by your organisation. Assure is easy to use and highly configurable so that you can ensure a complete and comfortable fit with your technical, process and information needs. Our on-boarding process builds on the understanding that we have gained during our previous discussions of what you are trying to achieve so that we can work together to configure our software to provide the best possible fit.

We know from experience that it is difficult to specify every detail of the solution up front - some options and opportunities only get discovered as we begin to work through the detail and you use the software. That is why we treat implementation as an iterative process in which we can configure and re-configure the solution until we are both happy with the result.

The first stage is typically a planning meeting to understand in depth your current processes and how (if at all) you would like to adapt them. This allows us to configure an outline solution with an organisation structure, permissions, picklists, status ratings, risk matrix, bespoke templates, action management, etc.

The second stage is iterative - you will use the software with your own data to test how it meets your requirements. We will work together to make configuration changes, at the same time training you in the configuration tools, until we are happy that the solution is right. At the end of this stage you will approve the system for rollout and it will go live.

In the third stage we will carry out user training, and may make further small adjustments if required.

In our experience, this process typically takes between 6 weeks and 3-4 months - the pace is typically set by the training, communications and roll-out processes within your organisation. We will assign a SHE Software project manager who will work with your project manager throughout, supported as needed by technical experts.

4. Service Management Details

Once your implementation is complete, your project manager will introduce you to your dedicated account manager whose role is to ensure that the system develops to meet your needs as they evolve.

The Assure solution has developed over a period of 20 years, guided by our dialogue with experts across our customer base and beyond. We constantly update our solution to meet latest regulations, add new features and take advantage of useful changes in technology. You will automatically benefit from these improvements via your hosted solution. Your account manager will notify you of all upcoming updates.

You will become part of the SHE Software user community, including our User Group and access to customer only social media discussion forums including one for proposing and voting on product improvements. The User Group is a friendly network for information and experience sharing, problem solving and thought leadership that meets at least once a year in a central location.

5. Service Constraints

For full details, please refer to the included Terms and Conditions.

Following satisfactorily completion of the implementation and configuration, SHE Software will use reasonable commercial endeavours to provide average availability of at least 99.9% over any 30 day period. Availability does not include planned maintenance events (which are scheduled outside of using working hours), customer-caused or third party-caused outages or disruptions, or outages or disruptions attributable in whole or in part to force majeure events within the meaning of clause 15 in the included Terms and Conditions.

6. Service Levels

Our customers prize us for our expert and friendly support both at initial implementation and on an ongoing basis. 95% of our customers renew every year. We have a proven implementation approach that ensures our software supports your process and we work in a straightforward, honest style.

Our UK based customer services team answer all calls promptly (100% within 15 seconds) and resolve problems quickly whether they relate to training or configuration. We follow a 6 stage case management process.

SHE Software Customer Support Process

All cases, issues, or requests for change are, in the first instance, reported to the Help Desk as the central point of contact. The Help Desk can be contacted by phone or email Monday to Friday 8.30am-5.30pm. Requests are recorded and monitored in our case management system which ties the request to your customer account to provide a complete history.

The 6 stages of case management are:

1. *Request*
2. *Classification*
3. *Investigation*
4. *Escalation*
5. *Resolution*
6. *Close*

1/2. Request and Classification

All calls to the Help Desk are recorded in the case management system. When you contact Help Desk, your case is raised as a Request, Problem or Question.

3/4. Investigation and Escalation

An answer will be provided immediately if a solution is known or a question can be dealt with. If the Help Desk is unable to resolve the case immediately, it will be investigated and escalated to the appropriate Support / Development team member.

5/6. Resolution and Close

Where requests are resolved without escalation, the customer will be given resolution details via Help Desk and after approval the case closed.

Where the case has been escalated, resolution details will continue to be maintained by the Help Desk. The customer will be informed of updates regularly until resolution.

7. Financial Recompense Model

Please refer to the included Terms and Conditions

8. Training

Assure has been designed by SHE Software with the user in mind, combining an intuitive consumer style interface with a corporate strength backbone. As a result, our products meet business requirements while being straightforward and intuitive to use - not just by experts but by your organisation at large.

SHE Software provides users with three training delivery options dependent upon customer requirements – onsite at our training facility near Glasgow, onsite at your organisation or online via webinar.

Onsite training at either your site or our offices is priced from £700+VAT per day but this is subject to location and travel expenses. To gain maximum benefit we recommend a classroom size limit of seven users. However, over a full day, we can train seven users in the morning session and seven more users in the afternoon session.

Online training via webinar is priced from £100+VAT per hour. Again, we recommend a maximum online classroom size of up to seven users.

Assure has been designed with the user in mind, combining an intuitive consumer style interface with a corporate strength backbone. As a result, it meets business requirements while being straightforward and intuitive to use - not just by experts but by your organisation at large.

Although influenced by the number of, and the level to which, users are to be trained, the number of training days required is always at your discretion. However, we will discuss with you a suitable number of days and which delivery method is best suited to your individual requirements.

All licenced users of Assure have access to our Knowledge Base that contains a variety of help videos and articles to help with everyday use of the module.

9. Ordering and Invoicing Process

Assure Health & Safety Management Solution modules are purchased directly from SHE Software. You can reach our sales department by calling 0300 303 3657 or by emailing gcloud@shesoftware.com. Alternatively, visit www.shesoftware.com/contact-us and complete the contact form. We will discuss your requirements and then tailor a quotation based on your needs following an online and/or onsite demonstration of the Assure system.

10. Contract Termination

Please refer to the included Terms and Conditions

11. Data Restoration / Service Migration

SHE Software will assist with data migration. We have various tools that allow the import and CSV files and/or live linkage to other systems via APIs. You can either purchase and use data import tools directly, or ask us to perform the migration for you. We can also provide various data cleansing options. There will normally be an additional fee for these services depending on the complexity of what is required.

12. Customer Responsibilities

Please refer to the included Terms and Conditions for detailed customer responsibilities.

One specific requirement to highlight is that strong implementation is critical to the successful adoption of our solution and customers have a vital role to play in this. For that reason, we require the following:

- *Clarity about what you want to achieve and the success criteria*

- *A customer project manager who is committed to the success of the project, has sufficient capacity to fulfil their role and will act as a focus point for communications*
- *Identification and involvement of those stakeholders whose support is critical to the success of the implementation*
- *Involvement of (a selection of) your users so that they are ready for change, have made sure that the system works in practice, and can act as advocates*
- *Communication/engagement with the various groups who will use the system*

13. Details of any trial service available

SHE Software does not offer a trial period for Assure. We do offer comprehensive, tailored demonstrations with both our commercial team of industry experts and, where necessary, our technical sales staff or development team.

These demonstrations can be facilitated online or on-site at either your offices or our head office near Glasgow. They provide an ideal opportunity to discuss your requirements and for SHE Software to demonstrate how Assure meets them. If we cannot meet your needs we will tell you at the earliest opportunity. This is also an ideal opportunity to have your initial questions answered.

If SHE Software is your preferred solution we can make arrangements for a limited time login to a demonstration version of Assure.

Should you require a demonstration of Assure, please contact us.