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Equinox Consulting Limited

Platinum Managed Service

[Client Name]

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1. Document History

1.1. Revision History

Revision date	Author	Version	Summary of Changes

1.2. Distribution

This document has additionally been distributed to:

Name	Title	Date of Issue

2. Purpose

[Client name] have requested that Equinox Consulting Limited (Equinox) provide a Platinum Managed Service package for the support and development of their ERP system, Unit4 ERP.

This document will outline the basis of the package and will form the service definition document for Equinox to carry out these services.

3. Background

[Enter background relevant to the specific client]

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4. Services Included

There are several service areas to cover, as outlined below, all areas will be monitored, and the performance of the team reported regularly to [Client Name] which will enable both parties to ensure that the services are carried out to the highest quality and will quickly identify any requirements for further resources should they be needed. The hours of service will be 8am to 5.30pm Monday to Friday but excluding Bank Holidays [optional 24/7 services can be included]. The services will be provided remotely with onsite visits for service reviews, stakeholder meetings, any post incident support required, or ad hoc meetings needed.

4.1. Platform Management

The Equinox Platinum managed service will provide [Client Name] with the reassurance that the ongoing improvement of the system will be done by:

- Continually reviewing all processes that are encountered throughout the contract with [Client Name] to continually strive to achieve the best solution possible.
- Peer reviews and collaborative working within Equinox will encourage ideas to be investigated.
- All new opportunities will be planned, tested, and executed by using structured approach to reduce interference to the business.
- Continued review of any changes will be carried out to ensure they are working as expected for the business, ensuring approval from the [Client Name] change control process.

Monthly service review packs will be issued to [Client Name] and Equinox will provide service management pack which will include:

- Ticket review
    - Service request
    - Incidents (including Problem Management)
    - Change request
- Breached SLA review
- Customer satisfaction feedback
- Development review
- Review of KPI's
- AOB

4.2. Platform Support

Equinox will provide support for Unit4 ERP issues to the maximum number of tickets which is agreed at [ticket number]. Equinox will work with any 3rd party providers to resolve any incidents that require their support to bring them to a full conclusion. Any issues raised that do not require 3rd party involvement will be handled via the Equinox Service Desk (See Section 8.5) and held to the following SLA's.

Incident SLA's are:

Incident Severity	Response Time	Resolution Time
High	1 support hours	4 support hours
Medium	2 support hours	7 business days
Low	4 support hours	30 business days or as agreed by all parties

NB: Items deemed as development work will be transferred over to the Platform Development area to be reviewed and managed there.

The guidelines of examples of what each severity would likely cover are:

Severity High – System down or a fundamental part of the system is not available and would likely need the hosting provider assistance to bring the system into a useable state. However, some examples may occur that could be managed by Equinox internally, such as a month end process not working. Affecting several people within the business, but other services are still active.

Severity Medium – This would be an issue that one individual would not be able to do something, and it is stopping them being able to work but does not constitute a generic issue that is causing issues for several users. In the main this should be able to be handled by Equinox.

Severity Low – This would be a user setup, not high priority and maybe not even required immediately if a new starter.

Any incident that is deemed to be development work will be moved onto a "Planned" status and will be managed within the Platform Development section of the contract.

Whilst Equinox will work with all 3rd parties to ensure a seamless resolution to any incident discovered, and any subsequent Incident Report identifying any lessons learned will be provided within three working days. [Client Name] will remain owners of the contractual relationships with all 3rd parties and this is purely down to [Client Name] to manage.

Credits will be applied where SLA's are breached as a direct result of Equinox not delivering within the time frame rather than due to the delay of a 3rd party or customer. These credits, which will equate to 1.5 days credit for severity of high and any breaches medium/low incidents will be reviewed in the monthly service review meetings. Equinox will be able to earn back any SLA credits applied to the contract by performing above an SLA delivery across all severity levels in the quarter following any breach. All credits will be managed within the service review meetings and paid back to [Client Name] quarterly in arrears if the earn back has not been achieved.

4.3. Platform Development

Equinox will provide development to a pre agreed level enhancements that will be identified by request by [Client Name]. Resources will be assigned to the development by way of best fit for the technical understanding required to deliver the best solution possible to [Client Name]. [Client Name] will provide reasonable notice of all required developments to enable Equinox to schedule the development.

[Client Name] have advised that there is a requirement for [enter agreed amount of development days a week], and any further need for development will be agreed and paid for in addition to the managed service fee.

All designs will follow the [Client Name] [insert client change policy followed], and they will be approved by the Business and Stakeholders prior to any release of a design into any LIVE environment.

Once any design is finalised the work will be peer reviewed within Equinox prior to arranging approval from the [Client Name] representative. When all parties are in agreement, testing will follow the Equinox standard test procedure in liaison with the [Client Name] Test Manager and only on the resolution of all major issues will the design be submitted to the [Client Name] change approval process. Assistance to seek any other resource that should be provided by [Client Name], such as user acceptance testers, will be offered. On change approval the design will then be rolled out to the LIVE environment.

All development and testing will be carried out on the [Client Name] platforms as outlined in Section 8.5.

5. Proposed Equinox Team

The Equinox team would comprise of [enter level of commitment needed], this will enable the team to achieve [enter agreed amount of development days a week].

This will provide the following breakdown of days per service each week.

Platform Management	Platform Development	Platform Support	Total

5.1. Credits

The breakdown of days shown above are interchangeable given required demand, and as agreed between both parties. In quieter periods of time when the breakdown of days is not utilised, a credit will be applied to the account in hourly brackets to be used at a later date, with a maximum of 8 half days per month. These can be used at any point within the year of that contract but will not be carried over on the contract anniversary. If the four days per month has been incurred for three months in a row due to the lack of requirement, then this should trigger a review of the contracted levels.

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5.2. Out of Hours

The fee will include a maximum of two weekend days worked throughout the year. This is to cover any releases required and other work which may require support during a weekend, such as a disaster recovery exercise. Any further days over and above the six days a year will incur a charge for weekend working as per the standard rate card in Section 7. Evening work will also be accommodated as part of the standard terms and conditions of this agreement, within reason, and will require the relevant notice period to ensure availability. No credit will be available for services not used in this area of the contract.

5.3. Hyper Care

Following any major release Equinox will provide 24/7 support for 4 standard working days following the release of the work. A major release would be classed as a piece of development work that affects the entire system and all users, eg: upgrades or new module releases. This would also cover any disaster recovery event be that planned or unplanned that impacts [Client Name], to work in conjunction with the service provided by the hosting provider.

6. Additional Service Available

Any additional services needed can be obtained whenever needed and subject to the availability of the correct resource, these can be brought on within a few days should this be necessary, based on the standard rate card provided in Section 7:

- Additional development resource
- Project Management
- Training videos and documentation
- Out of hours support (outside of that offered within the standard fee)

Future demand for services will be regularly reviewed in the monthly service management meeting and should there be a necessity for increased services [Client Name] will need to arrange a purchase for the additional services required.

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7. Managed Service Fees (excluding VAT)

Fees will be charged in advance and will attract 20% VAT charge.

Description	£
Platinum Managed service – Annual fee	[calculated based on service level required]
Total	

Additional service can be purchased as per the following standard rate card:

Level	Day Rate**
1. Follow	500.00
2. Assist	575.00
3. Apply	650.00
4. Enable	725.00
5. Ensure, advise	800.00
6. Initiate, influence	895.00
7. Set strategy, inspire, mobilise	985.00

** Platinum package discount of 10% is not included in these rates

Standards for consultancy day rate cards

- **Consultant's working day:** 8 hours exclusive of travel and lunch
- **Working week:** Monday to Friday excluding national holidays
- **Office hours:** 9:00am to 5:00pm Monday to Friday
- **Travel, mileage subsistence**: Payable at standard travel and subsistence rates
- **Mileage:** As for travel, mileage subsistence
- **Professional indemnity insurance:** included in day rate

8. Other

8.1. Policies and Procedures

At Equinox, we take the protection and care of our clients seriously and as a result have been awarded ISO27001 accreditation. We have several policies and procedures that our staff need to adhere to which [Client Name] can request to see should the need to. The following policies will be provided as part of this quotation:

- Health & Safety
- Business Continuity
- Data Security
- Environmental
- Information Security

8.2. Intellectual Property

Equinox assigns to [Client Name] the Intellectual Property, of any work designed for [Client Name] for their exclusive use and benefit. Equinox will keep their details confidential, delivering all documents relating to any part of the design to the [Client Name] whenever requested.

8.3. Marketing and Communication

Any correspondence with either users within [Client Name] or 3rd parties that are outside of the standard business processes outlined above will be passed through [Client Name] for approval.

8.4. Auditing

Equinox will be open to assist [Client Name] in any audit activity, whether that be regarding the annual financial audit of [Client Name] accounts or as part of the ISO procedures of auditing Equinox as a supplier.

8.5. Equinox IT Service Desk

Equinox will provide an IT Service Desk where all tickets will be raised for any issues or development will be logged and tracked. This will enable Equinox to track time worked on all items of the contract and will allow more focused work to be carried out due to having the one mode of logging all types of requests. This will be available by [Client Name] to connect with support staff within Equinox by either the IT Service Desk or view Teams. Any tickets logged with the [Client Name] IT Service Desk can be forwarded to a specific email address. The customer satisfaction survey results will form part of the monthly service management review.

All development and support work will be carried out on the [Client Name] network unless the work required is proof of concept when the development of some work may be worked on the Equinox Unit4 ERP. Either way, no [Client Name] data will be transferred out of the customer environment or transferred into the customer environment and as per Section 8.2 will always remain the intellectual property of [Client Name].

Over time Equinox will build a [Client Name] specific knowledge base which will be available if required to users of [Client Name] software.

8.6. Communication

Equinox employees will communicate with individuals within [Client Name] in relation to any support call logged or with any specific development criteria. However, where mass communication to the entire user base is required due to changes that are being requested by the business or upgrades that will affect system outages, Equinox will not be responsible for doing this, although will provide any assistance needing in drafting these communications.

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9. Key Tasks and Exclusions

Below contains a list of **the key tasks** per area but is not limited to this:

Inclusions		
Platform Management	**Platform Support**	**Platform Development**
[Provide examples based on client specific requirement]		

Below contains a list of **the exclusions** but is not limited to this:

Exclusions
[Provide examples based on client specific requirement]