

ASPREY MANAGEMENT SOLUTIONS

SERVICE DEFINITION

DEMAND BETTER, EXPECT MORE



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SERVICE DEFINITION

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1 INTRODUCTION

Asprey Management Solutions Ltd (“Asprey”) has provided **commercially proven** software solutions and supporting services to the social housing sector since 2002.

Our focus is **holistic asset management**, providing a comprehensive best of breed solution to assist our customers in managing the wide-ranging demands of today’s complex environment. With extensive and continued investment in our dedicated asset management solutions, we ensure our clients have the latest technologies, tools and advice on hand to manage current and future demands.

As early adopters of Microsoft’s BI technologies, we are keen evangelists of big data in housing and asset management. In addition to our dedicated solution delivering **unsurpassed strategic options appraisal intelligence and insights**, Asprey has built a reputation for delivering innovative Business Intelligence projects, mining better analytics and information from our own and third-party systems.

We provide consultancy services to many customers of our product’s competitors looking to obtain improved information from their incumbent systems.

Differentiating Asprey from other asset management system providers, is both our low-cost base (reducing your product lifecycle costs) and the availability of a 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.

Our BI expertise and products inform our customers’ macro-level decision making, whilst guiding our product evolution and ensuring clients create and manage reliable micro-level data for the modern social housing enterprise.

Asprey products enable **sound portfolio and business stream investment decisions**. They also flex for imminent changes that may revolutionise the needs of tenants and their providers.

2 ASPREY ASSETS

Asprey provides a **single cloud-enabled, fully integrated solution** to an established prestigious client base of housing associations, public sector organisations and charities across the UK, helping them to manage all of the business processes required of today's successful landlords.

Transforming the quality and levels of available macro and micro-level information, with analytics and interpretive support, leads to rapid payback for our customers. Asprey's powerful web-based BI and Reporting interface provides access to appropriate information for the right people at the right time, organisation-wide, from one reliable central source.

Economic collection and verification of asset management data and well-interpreted information dissemination is our abiding precept.

Our design principles encompass; (1) integrated functions, (2) single database, (3) homogeneity design:

Asprey Assets key functions are detailed in the diagram below and is available as either a single solution, or as a mix of integrated functions to meet specific needs, used to support a wide variety of strategic management and day-to-day management processes. Regardless of functions chosen users will also benefit from shared features, such as document management and innovative business intelligence features:



2.1 TRANSFORM YOUR OPERATIONS – SOLUTION BENEFITS

Our solution can help you harness a wealth of information and performance data across your organisation, and convert it into previously unimaginable specific business intelligence using our developments and the latest BI Tools

- Demonstrably proper asset custodianship
- Comprehensive functionality flexing with increasing sector needs
- Workflow and validation features and intuitive bulk import and export functions provide efficiency gains
- Intuitive analytics and visualisation of complex data
- Simple, ready access to macro and micro-level data
- Data management economy and accuracy
- Document and Evidentiary management
- Data integrity via our annual data audit and integral audit dashboards
- Provision of standard APIs and advanced integration, interfacing and data mining capability from our development teams
- Covers all asset management areas, with unique business-side support
- Asprey's consultants advise users of our competitors' products and our own, in a variety of projects
- Our focus upon continuous improvement and innovative use of generated information safeguards and improves user organisations

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 clients' organisations benefit from solutions tailored to maximising the financial and strategic value of their assets.

2.2 BENEFITS OF AN ASSET MANAGEMENT FOCUSSED PARTNER

With over **twenty years' experience** in social housing asset, compliance and works management, we truly understand this area. Asprey provides sound best-practice advice from its corporate wealth of knowledge, experience and qualifications. Our products, training, 'accessible' support and advice, provide tailored solutions for clients.

- As one of the only independent suppliers of asset management solutions, we do not compromise asset management information, functionality or consultancy services provision to the product focus of any parent or partner organisation, and we do not have an inherent bloated cost base.
- Differentiating Asprey from other suppliers, and a key benefit, is both our low-cost base (and hence product lifecycle costs) and the ready availability of our corporate body of social housing portfolio management knowledge, passed to clients economically, promptly and with continuity of core consultants.
- Our extended expertise in the fields of forecasting and financial planning, development, integration, business process review, change management and solutions architecture is key to supporting the business planning and decision-making needs of our clients.
- Unique amongst asset management or housing systems, our product clients have preferential access to our specialist consultancy division, Asprey BI; experts in providing

investment appraisal, financial planning, and strategic portfolio management advice for decision-makers.

- All our innovation, investment and R&D efforts are entirely focused on critical asset management operations (asset, compliance and works management) as well as strategic portfolio investment.

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 a homogenous approach by all our people so that we can flex our consulting strength readily as needs arise.

Operating with only full time, permanent employees our multi-disciplinary team have extensive experience of implementing and supporting our solutions. Asprey does not operate with a pre-sale, or sales team. Employing specialists and knowledge from a wide variety of disciplines is at the centre of the Asprey philosophy. We believe our knowledge transfer approach is what differentiates us from our competitors; our skill set encompasses everything from corporate finance and privatisation, asset management strategy and data management, to software development and IT systems integration. This ensures our clients get a truly comprehensive product tailored to our client's needs, and that all bases are covered.

With over twenty years' experience in social housing asset, compliance and works management we truly understand your business.



Independent provider of best of breed asset management solutions with extensive sector experience



Microsoft Partner guaranteeing quality solutions with ease of use and data accessibility key features



Extensive & continuous R&D programme aiding users with the latest technologies and solutions



No sales team ensuring purchase and project continuity and associated expertise



FOC advisory helpline for asset management business side advice for all users



Simple access to consultants and advisors as well as regular FOC account meetings

3 ONBOARDING AND OFFBOARDING

3.1 ONBOARDING

The Asprey 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 can be provided with a basic configuration that your users can then adapt and then populate as required.

All functions 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 can be 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 before a purchase decision is made.

3.1.2 IMPLEMENTATION SERVICES

All Asprey modules are highly configurable, to meet different operational and strategic business needs. This flexibility ensures that pertinent existing business processes can be readily accommodated, whilst the effective introduction of the solution 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 provide onboarding services that ensure Asprey's wealth of asset management experience and expertise, plus solutions architecture, business process, change management and financial modelling knowledge is exploited to minimise customer efforts and maximise skills & knowledge transfer.

Asprey follows a proven project management and implementation methodology which is a tailored adaptation of PRINCE2. For sensible utilisation of client time and availability, Asprey recommends a phased approach to implementing the key functional areas of our solution.

The basic high level implementation steps are:

- Implementation workshops
 - To establish specific design and configuration requirements, team roles and availability, and information and data sources.
- Appraisal of population data
 - Following which Asprey will provide the client with data templates for client population, that Asprey consultants will utilise for data migration.
 - Following the two stages above, a project schedule can be completed that accommodates the customer workload and availability relevant to data collation.
- System configuration
 - Asprey to configure according to organisation and user requirements and available data.
- System population
 - Asprey will undertake from completed templates.
- Baseline/pre-delivery meetings with client
 - To ensure user understanding and satisfaction with product functionality.
- Delivery
 - Deployment in test environment ready for training and user acceptance testing, then deployment live when successful.
- Training
 - Tailored Administrator, User, Trainer sessions as required by the organisation.

Obviously, the process is not wholly linear as there will be iterations within the above phases. Training, for example, may be delivered to coincide with delivery and baseline meetings may held at various stages of implementation rather than in one session.

Please note all Asprey services are provided remotely.

3.1.3 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 and are undertaken remotely. Classroom sessions can be discussed but would be subject to additional expenses. As part of the implementation documentation, clients are left with comprehensive training manuals, including all workshop sessions.

Whilst our training is quoted in days, it is usually delivered in short 2.5-hour sessions (3 x 2.5 sessions = 1day). We have found this to be a very effective approach ensuring user retention of information.

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.

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.

Please note all Asprey services are provided remotely.

3.1.4 ACCOUNT MANAGEMENT

Asprey will provide a dedicated account manager, with a wealth of asset management and compliance related experience who has undertaken 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 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 that would benefit its client base. Being sector and client driven in terms of development Asprey involves its client base in innovations and priority of new functionality in several 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. This has involved specialist training in fire risk assessments, accounting, and energy data and assessments, as well as degree course support. 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 can 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.

We have worked with Asprey's asset management clients, users of other asset management systems and partners to launch AspreyBI, promoting transformational social housing asset management practices by providing dynamic asset value portals and toolkits illustrating the true values of clients' stock and value drivers, for the purposes of sound investment/divestment decision-making to improve financial performance and social impact.

Asprey runs an in-person user group meeting annually and user group meetings always include sessions on our current development roadmap, plans and progress and affords our clients the opportunity to influence our development prioritisation.

In response to valuable feedback received during our 2024 user group meeting Asprey launched our on-line user forum back in March of that year. This platform not only serves as a hub for Asprey product users to exchange ideas, thoughts, advice, and innovations but also ensures timely updates on news and Asprey events. Designed with intuitiveness akin to platforms like Facebook and LinkedIn, our forum requires no intricate user instructions and is extremely simple to use.

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 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** – Regardless of functions chosen, Asprey provides the Solution with a Site Licence. This means that there are no hidden charges for additional users.
- **No hidden costs** – Initial implementation services are included. Our onboarding services offer a 'go-live' with confidence that the system is configured and populated to suit your business, leveraging from the extensive experience of our implementation consultants.
- **No hidden costs** – Hosted clients are afforded 'upgrade protection' as part of their annual rental coverage. This means, for any function in use, all upgrades would be provided FOC.
- **Unlimited user support** – given the range of potential users within your organisation, our support is not limited to numbers of users. Anyone using the system can contact our helpdesk for assistance. This option however is only available to users who have had formal training. Annual support coverage is subject to our SLA's.
- **No contract tie in** - Asprey do not force long contract terms to maintain annual fees and offer 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 appropriate API's FOC which means that you or your IT team have the freedom to interface our solution to any existing system your organisation utilises.

Please note our pricing does not cover:

- On site services/visits/training
- Hardware
- Microsoft Power BI licences
- Sava Intelligent Energy (unless shown as a listed item)
- Excludes population data that cannot be provided electronically (i.e. spreadsheet or database)

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 other support needed 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 online as part of the software package. Product help files can be accessed by the user on screen, and they are 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 Norfolk 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 and 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 0330 460 9752 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 in advance depending on your preference.

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

Expenses (usually just essential 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 system the Asprey solution will operate on most common infrastructures including virtualised desktop environments such as Citrix.

The minimum specification for end user workstations is as follows:

- Latest version of Chrome, Edge, Firefox
- 8Gb Ram
- Screen display 1280x720 or higher
- Microsoft Office 2013 for exporting and ad-hoc reporting or later

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

- Windows 11 tablet - The minimum hardware would be 4GB RAM, 32GB HDD, WIFI
- Android devices – The minimum requirement of Marshmallow (API Level 33). The minimum resolution targeted is 1080 x 2220.

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