

Service Definition Document

SFG20

MOBILISER



FACILITIES



The Service

The Building Engineering Services Association (BESA) Group introduced the SFG20 standard in 1990 to ensure consistent and compliant building maintenance. The standard is constantly updated by SFG20 technical authors. We now provide a fully integrated cloud-based facilities maintenance software solution, Facilities-iQ, as the best way to access and gain value from the SFG20 standard due to the software's integrated functionality. Facilities-iQ provides customers with a bespoke, customisable, and sector-specific utility across various aspects of asset management, streamlining the maintenance management process, and reducing costs through planned preventative maintenance.

Facilities-iQ accesses the SFG20 standard to provide clear, transparent, and visual representation of statutory, optimal, and discretionary maintenance tasks, setting the industry benchmark for successful and compliant maintenance. Within these schedules, customers can access asset specific details, such as maintenance tasks, frequencies, and required skillsets, maximising resource management potential.

Facilities-iQ is used by building owners, facilities managers, contractors, and consultants to maintain assets, while ensuring compliance with legislation. The solution offers access to an extensive library, exceeding 1500 maintenance schedules.



In addition, schedules are dynamically updated in accordance with alterations to UK legislation, maintaining contemporaneity and customer compliance with regulatory expectation. Whenever these live alterations occur, customers receive automated notifications, which provide details of the legislative change and impact upon the sector, ensuring that organisations can prepare for and accommodate government changes.

Facilities-iQ has functional connectivity and sharing capability, meaning that required maintenance can be distributed directly from the system and acquisition processes can be streamlined. Where organisations struggle with connectivity and software integration, our SFG20 API solution enables functional integration with customer operating systems and eliminates errors resulting from manual data uploads.

Facilities-iQ functionality and system features deliver benefits for our customers.

Included in the standard SaaS subscription:

- Use of the Facilities-iQ web application by authorised users under the subscribed licence.
- Access to the SFG20 schedule library and content updates provided during the subscription term.
- Standard product updates and maintenance delivered by the supplier.
- Automatic updates notify users of changes to SFG20 content.
- Remote onboarding support and access to online help resources and learning materials.
- Standard support during published support hours.

Optional (chargeable) modules and services:

- SFG20 Mobiliser
- On-site/On-Line training or workshops (where requested).
- Asset information and data preparation services.
- Customisation of standard schedules, creation of new schedules and/or additional configuration support.
- Bespoke integration work beyond published APIs and standard export formats.

Pricing and scope for optional services are confirmed separately in the Order Form and/or pricing schedule.

In addition, customers can receive support via the following methodologies:

- An email support system via our helpdesk, facilitating customer support and responses within 24 hours, apart from weekends and public holidays. This support service is provided with no extra cost. Typically, we identify solution timescales within 24 hours, relaying the result to the customer via ticketing updates.
- Direct communication via helpdesk telephone, which will facilitate connection with an appropriately skilled, dedicated individual and solution development.



The above channels of communication remain available during the following timescales:

- Phonelines and IT support between standard operational hours, 9:00am-5:00pm, excluding weekends and public holidays.

Additionally, we deliver the following SFG20 support, which can be accessed by our customer:

- Online demonstrations before purchase supporting utilisation.
- Automated notifications detailing product changes, legislative updates, and changes to the SFG20 standard.
- An extensive, dedicated webpage which supports customer solutions, covering every aspect of functionality.
- Online learning and development portal, featuring help video tutorials.
- Regular technical updates detailing changes to content.

To facilitate navigation of these web-based support features, our website utilises a strong, navigable, and visual user interface, providing accessible and transparent information regarding services, functionality, and solution support. Across our service, we implement support features which can be accessed via web-based communication and services, such as:

- Previous service case studies.
- Business requirements.
- Service scope.



Facilities-iQ

Facilities-iQ has innate customisation functionality, providing a variety of customisation options to the customer. These customisation options vary depending upon subscription type, and includes the following:

- Creation of custom schedules based upon the work they must complete and sector requirements.
- Customisation of schedules to incorporate technical content, frequencies of the tasks, skillset requirements for each task, including details regarding completion deadlines.
- Tailored schedules to incorporate notes for engineers, adjustments to task timings to better reflect site specificities, and adjustments to task criticality regardless of subscription type.

All Facilities-iQ customisable functionality is aligned with the SFG20 standard.

Acting in accordance with ISO 22301, BESA Group operate robust business continuity, disaster recovery, and contingency measures, engaging the optimum assessment and systematic response methods, minimising disruption caused by an emergency.

Continuity plans and procedures are reviewed annually, or whenever lessons learnt must be implemented, by Head of Operations, with oversight from our Chief Technology Officer. Our recovery plans have four objectives:

Define and prioritise the critical functions of the business

Analyse the emergency risks to the business

Detail the agreed response to an emergency

Identify key contacts during an emergency

When delivering service, we understand that continuous and developing threats can be posed and, as such, we have developed bespoke service-specific assessments, identifying primary risks that could hinder service delivery and outlining our procedures for mitigating their impact. By doing so, we proactively ensure business and service continuity, whether these hazards come into effect or otherwise. Through a combination of likelihood and adverse impact upon service, BESA Group recognise and mitigate potential disruptions.

To ensure that disaster recovery remains compliant with standards and addresses the most contemporary risks, we commit bi-annual disaster recovery tests, identifying efficacy, potential improvement, and developing risks. Our continuity assessments and disaster recovery plans include contingency for the following events:

- Illness outbreaks and widespread unexpected absenteeism.
- Physical disasters and premises damage.
- Data loss and cyber-attacks.
- Power outages.
- Supply chain shortfalls.

SFG20 Mobiliser

SFG20 Mobiliser is an AI-powered software module that can be used alongside Facilities-iQ to quickly identify the correct maintenance for customer assets. Mobiliser uses proprietary AI to map an asset register to the correct SFG20 schedules with precision, cutting mobilisation time from weeks to hours.

Asset registers are often inconsistent or poor in quality and may be drawn from spreadsheets, COBie files, and FM systems. Mobiliser is designed to address these challenges by identifying the correct maintenance for assets with speed and accuracy—supporting the development of maintenance strategies in hours rather than weeks.

SFG20 Mobiliser works in three steps:

- 1. Upload your asset data:** import an asset register from Excel, COBie, or an FM system. Mobiliser accepts multiple formats and automatically structures poor quality or incomplete data for mapping.
- 2. Map automatically with AI:** automatically map the majority of assets; where information is missing, guidance is provided to assign the correct mapping.
- 3. Integrate:** users retain control to accept or adjust mappings (or map manually). Outputs can be integrated with FM systems via API or used to output the SFG20 mappings.

MOBILISER



What Are the Benefits of SFG20 Mobiliser?

Benefits delivered through SFG20 Mobiliser include:



Rapid Mobilisation:

Reduce manual mapping time by up to 95%, getting projects live weeks earlier.



Improved Compliance:

Apply the SFG20 standard consistently to reduce risk and meet audit requirements with confidence.



Accurate Mapping and Transparency:

Mappings are supported by confidence scores and clear review options; Mobiliser uses asset descriptions and manufacturer information (including models and codes) to aid correct identification.



Control and Scalability:

Users stay in control (accept, change, or map manually) and Mobiliser is designed to scale from small asset lists to very large registers.



Standardised Outputs:

Standardise mapping across projects and teams, supporting auditable, consistent schedules.



Our business continuity plan (BCP) is updated for each customer and is integrated into our management processes as standard. The BCP is audited annually with a report being made available to our customers on completion.



Onboarding and Offloading Support

SFG20 provides comprehensive onboarding assistance, which includes training and demonstrations. An inclusive online demonstration of the service is also provided prior to purchasing a license to access the service. Our onboarding procedures are developed, overseen, and conducted by software solution experts, ensuring that all users transitioning onto our platform gain a thorough understanding of its optimal usage.

Our on-demand learning platform provides additional onboarding and developmental support. This provides a wealth of support resources, such as concise instructional videos, instructions, and user guides. In addition to virtual support, it also provides an opportunity for customers to enrol in instructor-led onboarding training sessions conducted by our expert trainers - additional charges apply.

Our online training equips customers with a comprehensive understanding of the software solution and provides hands-on, expert-led training that helps you build, tailor and maintain compliant maintenance regimes faster.

Throughout the sessions, learners will:

1

Utilise our software solution to its fullest potential, leveraging features such as the help centre and update notifications to stay updated on the latest legislation and enhancements.

2

Configure and administer user accounts with appropriate license types and roles.

3

Customise maintenance schedules to streamline maintenance processes.

4

Select and adapt schedules to create a robust maintenance regime tailored to specific needs and assets.

5

Electronically share maintenance schedules with relevant stakeholders to minimise risk and maintain the golden thread of information.

Our team of skilled technical professionals also help in developing efficient and economical maintenance regimes for tendering, auditing, and managing contracts.

Upon cancellation of subscription, the customer will lose access to functionality upon completion of payment period, and access to the Facilities-iQ system and content will be revoked. As our content is dynamically updated based upon legislative changes, content held by the customer would not be contemporary, compliant, or usable beyond the latest updates. When cancelling a licence, there is no additional cost to the customer, nor when reactivating the license during the future.

Service Constraints

Facilities-iQ is a SaaS and requires users to have suitable connectivity and supported devices/ browsers. However, extra constraints may be implemented during periods of maintenance, update, or reconfiguration, which will always be brought to user attention before commencement. Additionally, the service is protected by requiring users to access their official registered email address, securing the system and imposing constraints on unauthorised access.

All our methods are defined following industry best practice and are integrated into our management processes as standard and are audited annually with a report being made available to our customers on completion.

Service Levels (Performance, Availability and Support Hours)

The support levels provided by Facilities-iQ are comprehensive and accommodate the requirements of users throughout service delivery.

Service Management

Availability

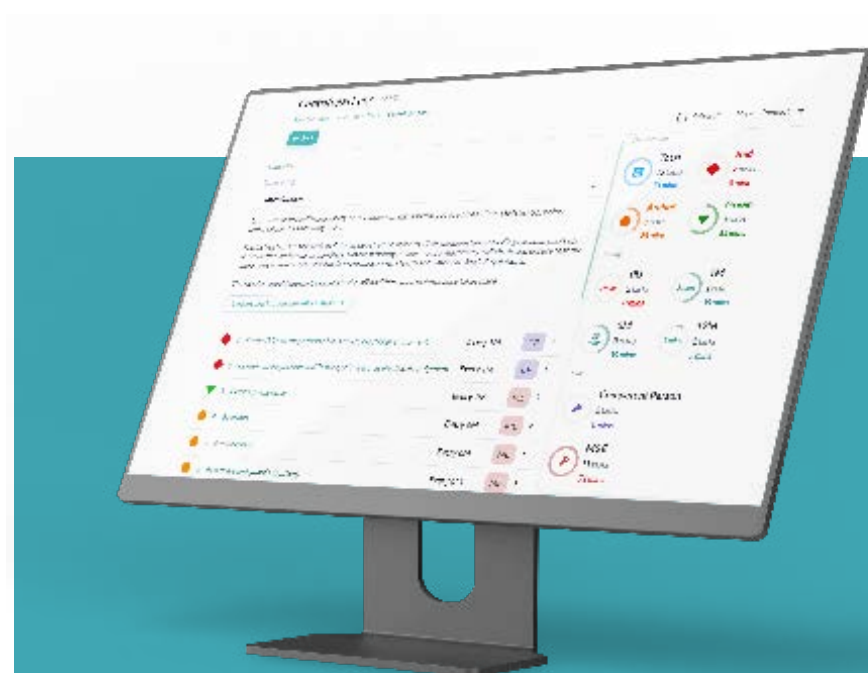
Availability is expressed as a service-level target to support buyer evaluation. Where a call-off contract specifies different terms, the call-off terms take precedence. Availability target: 99.9% monthly availability for the Facilities-iQ service, excluding planned maintenance windows.

Planned maintenance

Planned maintenance is scheduled to minimise disruption and is normally performed outside standard support hours. Advance notice is provided to customers where practical.

Incident management

Incidents are prioritised based on impact and urgency. First-response targets are provided below. Resolution times depend on root cause and may require workarounds, fixes or planned releases.



After Sales Support

SFG20 have a dedicated help desk which supports utilisation of the SFG20 system post-sale, which is facilitated by system experts and developers, delivering case-specific, continuous, and dedicated support. Queries regarding SFG20 products should be communicated via the following methodologies, which can be accessed between 9:00am-5:00pm:



Email:
info@SFG20.co.uk



Post:
Old Mansion House, Eamont Bridge,
Penrith, Cumbria, CA10 2BX, UK



Phone:
01768 860 459



FAQ Bulletin Board:
www.sfg20.co.uk/resources/faqs

Customers are likely to receive prompt service via telecommunication and email provided that the information relayed pertains to the issue and accurately delivers an understanding of the problem. Overall charges for subscription to the SFG20 service cover support inclusion, ensuring that system discrepancies can be rectified, except for on-site support, which may incur additional charges.

When updating the SFG20 standard or software solutions, SFG20 will ensure email communication and information on our website covering changes. Additionally, we can support third party engagement, provided they hold a SFG20 licence.

Technical Requirements

The system is supported by Chrome/Edge/Safari browsers and requires a minimum 8GB RAM and 1280x1024 minimum resolution.

Outage and Maintenance Management

Based upon the hosting environment's internal SLAs, should an outage occur, we will be notified by AWS via email, push notifications, and our IT management tools. As we have 99.9% up time, we can provide rapid response regarding issues that impact customers, as our support team are readily available, communicating with customers directly via email.

A notification will be placed on our website, expressing the outage, and explaining the ongoing response; however, we understand that not every customer will access our website during this time and, therefore, may not become aware of the outage. As such, we will send continuous outage emails, updating on progress and expected service return. This ensures customers hold accessible information regarding an outage and can accommodate the downtime.

Once the outage has been resolved we then send a further email to customers notifying them and update our dashboard to notify anyone using our website that the outage has been resolved.

In the instance of faults where the system remains operational, but the function of some features are degraded, we will prioritise according to the following schedule:

Priority	Triage / 1st Response Time	Contact Frequency
Urgent	Within 1 hour	Daily
High	Within 3 hour	Daily
Medium	Within 1 day	Weekly / Monthly as agreed per incident
Low	Within 2 days	On changes of status / work carried out

Priority Key:

Urgent: Service is unavailable, or there is a significant loss of core functionality affecting many users.
E.g. Login outage; Regime/schedule access unavailable.

High: Severe degradation or a critical feature is unavailable with a limited workaround.
E.g. Key output failing; API connectivity interrupted.

Medium: Non-critical feature failure or limited impact with a workable alternative.
E.g. Minor output issue; intermittent UI defect.

Low: Minor issue, request, or cosmetic defect.
E.g. Text/UI formatting issue; minor usability request.

When managing software orders and invoices, SFG20 undergo the following process, ensuring compliance with statutory legislation and regulation:

- Discuss client requirements and system utility.
- Undergo quotation, with a sales contract emailed to the client for approval and signing.
- Receive signed contract from the client.
- Undertake account setup.
- Automated email sent to the client, notifying them of SFG20 solution login details.
- Client account set up within the financial system.
- Invoice created and sent to the client via email for payment – typically stipulating a thirty-day payment term.

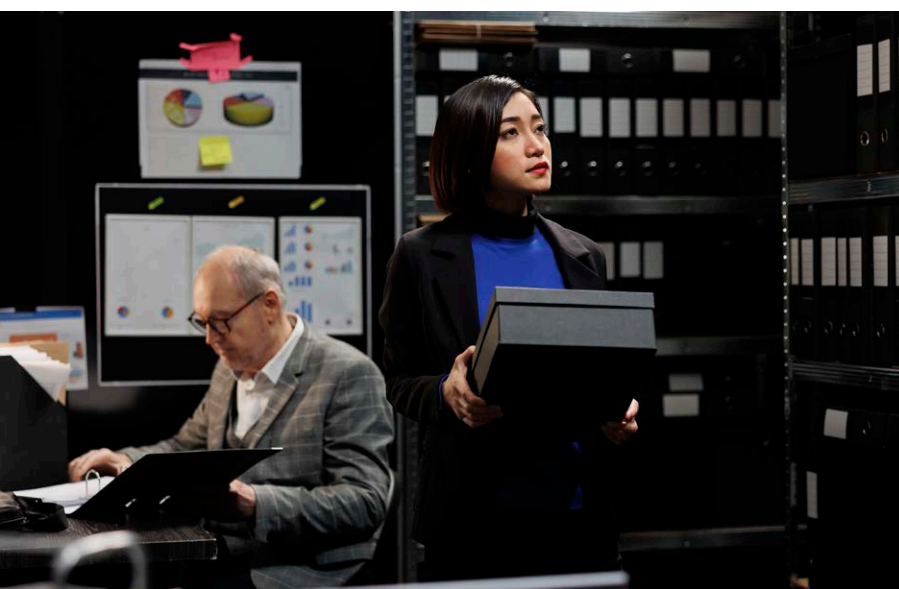
We use appropriate tools and third party organisations to assess threats to our services. All change activity is managed, monitored, and tracked from initial development to production. This allows us to track the components of our services and monitor and report on any changes.

We are audited and certified against the Cyber Essentials Plus standard, so we can be confident that threats are getting dealt with accordingly and there are no vulnerability issues within our services. Our vulnerability management process is subject to yearly external review so we can ensure our process is effective and of a high quality.

Access to Data (Upon Exit)

Customers can terminate their subscription with our service whenever they feel it necessary, but they must pay until the end of their contract period. Conclusion of the subscription will remove the functionality of the system upon conclusion of the payment period and limit access to updated system outputs, including legislative changes, feature updates, and schedule management tools. We do not incorporate a cancellation fee but data which has not been exported before the payment period end date will be lost and cannot be recovered.

Data extraction via upload into the customer's CMMS system must be completed before the conclusion of the payment period, as data will not be recoverable beyond this timeframe. Furthermore, data extracted before termination will no longer receive update regarding legislation and regulation changes. However, terminated accounts are not permanently deleted and, therefore, customised data can be made recoverable upon reinstatement of a subscription.



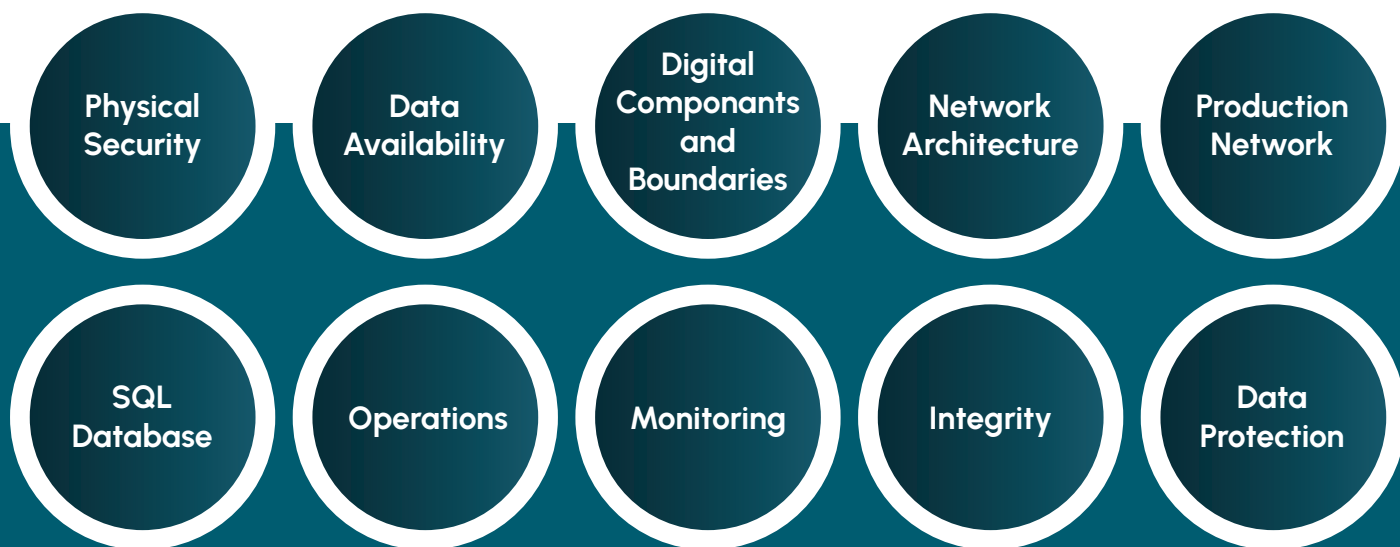
Should a customer decide to terminate their contract, their licence will then be cancelled immediately, which will be confirmed via a cancellation email, with services ceasing at the end of their current payment period. Prior to the payment period closure, users will be prompted to remove any data, being reminded that the service will be unavailable moving forward. There are no associated costs to a user for cancelling their contract and, should they return to the service in the future, there are no extra costs associated with reacquisition. Should a client return after cancelling their contract, their new subscription would be costed at the current prevailing cost.

Security

In accordance with Cyber Essentials Plus, the Data Protection Act (2018) and GDPR policy, all personal data we hold is limited to the name, username, email address, record of account activities, transaction records, and subscriber organisation as applicable for each user. All personal data is processed only to the extent and for the duration necessary for the legitimate interest of performing our obligations under the contract with the subscriber by which a user is accessing our services. We are ICO registered and personal information is accessible to the appropriate individual upon request.



As Facilities-iQ is a software solution, no physical products contain data and, therefore, responsibility for Data Protection compliance is overseen by our Chief Technology Officer. Furthermore, our Head of Operations has operational responsibility, with oversight from Chief Technology Officer, maintaining the following aspects of security:



To assure security of sensitive data, our internal systems are encrypted to varying degrees, password protected, and require certain authorisation levels for access. This ensures that encryption levels protect the purpose of data use, importance of data type, and consider the individual requesting access.

Personal data, such as names, is pseudonymised or redacted, with encryption details and access information stored on a separate, secure system for contingency. Additionally, we incorporate the following data protection procedures:

- We operate with secure VPN access for remote workers, ensuring security when off the main network.
- Data stored on computers/mobile phones are protected by passwords with two-step authentication and 'single sign-on'.
- We operate 'Next Generation' firewalls with linked endpoint anti-virus/anti-ransomware, keeping endpoints safe and the ability to block access to any compromised devices.
- All internal devices are required to have the latest security updates, ensuring that all hardware and software remains contemporary, minimising the possibility of data breaches.

Furthermore, information security and GDPR training is provided to employees, ensuring the principles of data security are reflected across service delivery, and system end users can be trained for data protection compliant and secure utilisation. The above procedures and overall information security systems are managed and overseen by the following individuals with appropriate responsibilities:

- Our Chief Technology Officer will ensure that integration and systems remain compliant with expectations, regulations, and legislation, including data protection, and maintains necessary resource. The systems and procedures are audited bi-annually, or whenever significant changes occur, implementing necessary information security training modules.
- Our team of GDPR officers cover subject access requests, GDPR employee advice and business support, and legal support, such as contracts management. The team oversee changes within data protection law and policies and manage data breach investigations.
- All employees receive GDPR training and are kept updated on company policy.
- Individual employees hold responsibility for maintaining the integrity and confidentiality of any assets provided by the company.

Should it be suspected that data protection protocols have been breached, we have implemented contingency protocols which mitigate damage and secure the system, detailed as follows:

- Any potential breach will be reported to the Chief Technology Officer.
- Any potential breach will be subject to a data protection impact assessment (DPIA), which informs next steps, incident response, and associated communication plans regarding impacted stakeholders.
- All high-risk personnel will be informed of the breach.
- The DPIA is performed by Change Support Manager.
- Utilisation of the central back-up of client information.
- Utilisation of central back-up of employee information.

Any breach will be investigated and reported to the appropriate authority once the severity of breach has been determined. An incident response team will undertake an impact assessment of the incident, per GDPR requirements, determining individual risk, which will then inform next steps relating to GDPR, aligning with our data protection policy. If required, a team of business, IT and marketing stakeholders will then coordinate further activity.





Easy as 1, 2, 3

No complicated set up process. Select your content, subscription type and licence requirements, receive your login and you're ready to go.

SFG20 Facilities-iQ is easy to use.
But we're here to support you every step of the way...



Customer Support

Our dedicated customer support team that is ready to help you with all your technical questions, and can be reached by email, phone, or by submitting a Contact Us form on our website:



Learning and Development

Get up and running from day 1 with our library of 'How to?' video resources. We also offer a range of online training courses to suit your needs.



Resources

From e-guides to case studies, blog articles and webinars, SFG20 has a library of educational content to support your team with optimising all areas of building maintenance.

For bespoke projects and requirements, speak to our consulting team.

Have questions?

Give us a call and we'll talk you through it.

info@sfg20.co.uk 01768 807504 sfg20.co.uk/contact