



ERP Customer Success Programme

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About this Document

Nature, Use and Limitations

This document has been prepared by the Agilyx Group ("Agilyx"). Whilst it has been prepared by the Agilyx Group in good faith, with care, it has not been prepared on the basis that it will form part of any legal agreement between a member of the Agilyx Group and or any third party. The Agilyx Group accepts no responsibility for any reliance on any of this document's content and it should not be used as a substitute for a formal legal agreement between the Agilyx Group and the Customer.

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The end is just the beginning – improvement shouldn't just stop when you finish your ERP implementation.

Introducing our Customer Success Program

At Agilyx, we focus daily on creating and enhancing the Ideal Customer Experience. To empower our Customers to be successful, we are here to drive the cornerstones below:

- Maximising the effectiveness of your ERP to help you achieve your mission;
- Responding in a timely manner to support questions that you otherwise can't get answers to;
- Assisting you to leverage and enhance the significant software investment you've made by being both efficient and happy users; and
- Ensuring that as your organisation changes, together, we are reassessing needs (not the needs expressed at implementation) and making the necessary adjustments to enhance your Enterprise Platform and realize your investment now and into the future.

The Enterprise solution you operate today is a solution that readily and rapidly adapts to meet changing needs over time; leveraging these enhancements requires small investments over time that will prevent the need for a total system change every 10 years (the historical average).

Our Customer Success Program inextricably links our success to that of our customers. It is relationship-focused and aligns our goals for our mutual benefit and defines the way we have organised our products and services in order to ensure the success of our customers. In a nutshell, we see customer success as boiling down to delivering exceptional outcomes and experiences for your customers – and being able to measure the impact.

Central to this is your Customer Relationship Manager, a senior member of our team, experienced in supporting our clients and with the products and services we deliver and how best to access them.

Your Customer Relationship Manager will work with you to explore your aspirations and objectives calling upon members of our team as required, in order to help define your journey and align our resources, making working together frictionless, ordered and consistent.

Whilst your corporate IT strategy or digital transformation journey may have several projects with sponsors, managers and consultants, your Customer Relationship Manager is your first point of contact, your voice within Agilyx and your trusted ally in helping you achieve your vision.

You don't own a car without getting it serviced regularly so why would you own an ERP (a far more valuable asset) without having a service plan to match?

Why Choose Agilyx Customer Success?

- Gain preferential access to a **Global Team** of experts based across three continents
- With over **500 years of U4 ERP** experience including HR/Payroll, you can be confident that your U4 ERP system is in the very best hands
- You will be partnering with a **Unit4 Elite Partner** with a **20+** year relationship with Unit4 – your voices will be heard
- You will have a dedicated **Customer Relationship Manager**
- The personnel you work with are **Unit4 Certified** professionals
- You will receive an **On-Demand** level response
- You are part of **one proactive program** to manage all of our customers' Unit4 needs.

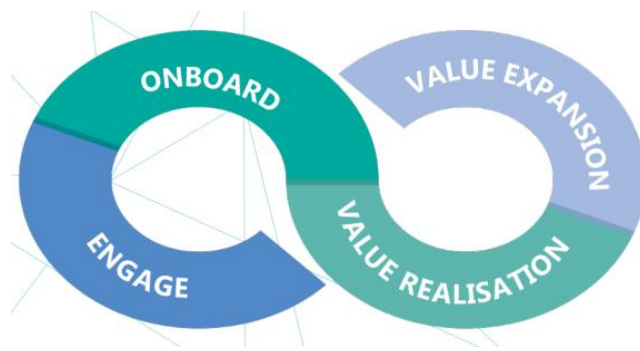
Your Customer Success Journey?

We are here to partner with and develop a long-term relationship with you, our customer

Our partnership with you develops its foundations with a series of successful projects jointly delivered to a mutually agreed plan

Your Customer Relationship Manager will work in partnership with you for the entirety of your Customer Success journey.

Each project within your plan will have 4 key phases: Engage, Onboard, Value Realisation & Value Expansion



During the **Engagement phase**, your Customer Relationship Manager will bring together all the skills necessary to scope your proposed projects, design the solutions, project plans and other documentation required to prepare for the next phase.

Onboarding is where we bring our collective teams together, explain the project, the controls,

processes and procedures so that everyone is ready for the next key phase of the project.

Value realisation is where all the objectives of the projects are realised, and the solutions delivered.

In **value expansion** we work with you to identify further value that could be obtained by better use of existing modules, process review, new technologies or other changes that could be beneficial to you.

Our Customer Success journey is not designed to abruptly end when value has been realised, we loop straight back to continue your journey of excellence.

Customer Relationship Manager

Your Customer Relationship Manager will work with you to ensure you have access to the right services at the right time. They will work with you to create a bespoke Customer Success Program for you that will deliver a holistic experience throughout your journey with us, we are confident that is un-matched within our industry.

Your interactions with your dedicated Customer Relationship Manager are the focal point of ensuring that we deliver on our promises to you, their goal is your success.

Our services are divided into three pillars:

- 1. Consultancy as a Service (CaaS)**
- 2. Global Extended Support**
- 3. Professional Services**

Pillar 1 - Consultancy as a Service (CaaS)



Consultancy as a Service (CaaS): We assign a dedicated team of specialists to your organisation, giving you the support to deliver specific objectives or even daily tasks - helping you get the most out of your Unit4 ERP solution

What is it?

We offer four levels of Consultancy as a Service. Each level offers several benefits giving you the ability to select the best level to meets your needs.

What services are included?

Customer Success	Basic	Standard	Premium	Enterprise
Discount provided by package purchase versus standard blended rate	7%	14%	19%	25%
Named Users Access	1	2	3	5
Planning Cycle w Success Mgr.	Annual	Half Yearly	Quarterly	Monthly
Report Writing	✓	✓	✓	✓
Technical support	✓	✓	✓	✓
Consulting	✓	✓	✓	✓
Discount on Global Support Contract	✓	✓	✓	✓
One on One Training	✓	✓	✓	✓
Regular Webinars	✓	✓	✓	✓

Customer Success	Basic	Standard	Premium	Enterprise
Ability to add Global Coverage for CaaS at additional cost*	✓	✓	✓	✓
Training seats per year**	✓ (1)	✓ (2)	✓ (3)	✓ (5)
Carryover % of Hours Quarterly		✓ (5%)	✓ (7.5%)	✓ (10%)
Discount on Professional Service Rates		✓	✓	✓
Development			✓	✓
Free Passes to in person X4U			✓ (2)	✓ (4)
Access to Named Consultant				✓
Helpdesk question sessions				✓

*Global Coverage: If you have office locations around the world or simply want to take advantage of our Global team, you can purchase a Global add-on for a small supplement to the monthly cost. This will give you unique access to a team of experts around the globe in locations such as North America, Europe, and Asia Pacific.

**Free seats to a defined list of short training sessions such as Year End

How to add

You can add CaaS by contacting your Customer Relationship Manager. An initial consultation will take place with your dedicated Customer Relationship Manager who will assist you in setting up your named users, advise how to log a request and agree initial deliverables. With a dedicated team of CaaS consultants, work can begin right away in most cases.

How your services are delivered

	Engage	Onboard	Realisation	Expansion
Consulting as a Service	Your representative works with Agilyx Sales and/or your Account Manager to identify level of service required. Contracts are provided, reviewed and signed	You are setup on Zendesk and provided a walkthrough on how to raise a ticket Customer Success Manager initiates kick off meeting with you to gather additional details: - Details of your existing implementation - Creates at least a first quarter plan with the you and discusses longer term goals - Team is introduced and provided access	Tickets are raised via Zendesk and resolved to your satisfaction by the CasS team. Customer Success Manager provides regular updates on status of tickets and health of projects. Customer Services Manager provides updates on new functionality & feature sets which may be of interest to the you.	Through tools such as Webinars and regular contact with your Customer Success Manager, you will be able to plan ahead to continue to increase the ROI of your system.

Pillar 2 - Global Extended Support



Global Extended Support Services: With our 'follow the sun' global support, you will have access to round the clock services, when and wherever you need them.

What is it?

We offer Extended Support which enhances any support provided through a Unit4 Support contract, with two levels of support available. Both are available via an annual contract and work is subject to SLA's.

What services are included?

Level 1

These are pre-agreed tasks, that have been scripted and are undertaken by our system administrators in your live environment on your behalf. This might include:

- Simple issue resolution or General support
- User/Role administration
- Data control
- Workflow - items to follow-up.

Level 2

Level 2 is for functionality that was working previously but has stopped or elements requiring further investigation.

All work is undertaken in a test environment. The Support Team will advise the customer how to fix in your live environment.

This does not cover maintenance or tier 1 items and does not cover new configuration or development items, they would typically fall under either Unit4 support, our CaaS program if you are a member or professional services.

How to add

Customers can either add Extended Support as a standalone offering or as an add-on to our CaaS program, combining with our CaaS program will enable you to take advantage of additional discounts and a full 360-degree service from our global team. Customers can purchase by contacting their Customer Relationship Manager.

How your services are delivered

	Engage	Onboard	Realisation	Expansion
Global Extended Support Services	Post Implementation (Business as Usual) support delivered under a SLA. Engagement via your Customer Success Manager or Account Manager	Working with the Support Manager to onboard you onto our Global Support Service. Making sure that you and your team understand how best to access the service and that all associated tools are working as expected.	Our Global Support is delivered by our dedicated Global Support Team to provide 24/7 support for all your support needs.	Thorough analysis of support tickets and issues logged will help identify possible process or system improvements that could be made to improve efficiency and increase the return from your systems. This is something we provide as a matter of course.

Pillar 3 - Professional Services



Professional Services: From strategic advisory, health checks, development, knowledge transfer and more, you receive access to a range of services from our consultants at discounted rates when combined with CaaS.

If you are looking for a services partner to help implement, upgrade or add additional modules to your Unit4 ERP solution then our Professional Services solution will address your needs.

What is it?

This is the full range of services provided by our professional services team including strategic advisory, health checks, project management, knowledge transfer and much more.

What services are included?

Our professional services team deliver all the services you need to implement Unit4 ERP, upgrade an existing solution or implement new features/modules.

This will be achieved through the selective use of services to meet your needs.

How to add

You can add Professional Services by contacting your Customer Relationship Manager, they will gather the required information to provide a Statement of Work for sign-off. Once signed, a Project Manager and Project Resources will be assigned. There is typically a short lead time from signature to the start of the Project.

How your services are delivered

	Engage	Onboard	Realisation	Expansion
Professional Services	New implementations and upgrades Engagement with Agilyx Sales or your Account Manager	Project Management Office to assign Project Sponsor and Project Manager and coordinate project kick-off.	Co-ordinated by our Project Management Office and delivered by our Professional Services Team through various phases	Further projects as requested by you. Enrolment into additional services in the Customer Success

		Project Plan agreed and consulting team assigned and introduced. Environment's setup and team provided access.	• Requirements • Solution Design • Build • Testing • Deployment • Post Deployment Support	Program such as CaaS or Support
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Service Overlap

Naturally, there is some overlap in the services delivered by our three pillars. This table seeks to illustrate how this is delivered, with the ability to combine services in your agreement and avail of additional discounts.

Service	CaaS*	Global Support	Professional Services
Strategic Advisory	✓	X	✓
System Optimisation	✓	X	✓
Health Checks	✓	X	✓
Change Management	✓	X	✓
Development & Integration	✓	X	✓
New Full Module Design	X	X	✓
New Full Module Implementation	X	X	✓
New Experience Pack Design	✓	X	✓
New Experience Pack Implementation	✓	X	✓
Existing module rework	✓	X	✓
Upgrade support	✓	X	✓
Project Management	✓	X	✓
Knowledge Transfer	✓	X	✓
Training	✓	X	✓
Hypercare	✓	X	✓
Staff augmentation (within allocation)	✓	X	X
Global Support - Support	X	✓	X

***Terms & Conditions for CaaS usage**

Additional hours can be purchased for use within the quarter at the standard services rate per our rate card.

Projects with planned hours in excess of two quarters' equivalent of standard hours for package purchased will be classified as Professional Services

Appendix A – Pricing

Consulting as a Service (CaaS)

Customer Success	Basic	Standard	Premium	Enterprise
Named Users Access	1	2	3	5
Monthly Cost	£1,285	£2,375	£4,466	£7,755
Passes to X4U	0	0	2	4
Carryover Hours Quarterly	0%	5%	7.5%	10%
Global Access Add On (if required)	£550	£875	£1,100	£1,455
Discount on Professional Services rate card	0	5%	7.5%	10%
Max Monthly Hours (CaaS only)	10	20	40	75

Global Extended Support

Global Extended Support	Basic	Standard	Premium	Enterprise
Named Users Access	1	2	3	5
Level 1 & Level 2– Monthly cost	£690	£784	£1095	£1550
Carryover Hours Quarterly	0%	0%	5%	7.5%
Discount on Professional Service Rates	0%	0%	5%	7.5%
Discount on CaaS rate if purchased together	0%	0%	5%	7.5%
Max monthly Hours	5	7	10	15

Additional hours per month

We understand that on occasion there will be the need to flex the available hours within a month upwards. Therefore, as a member of the Customer Success Program additional hours required (excluding Professional Services), will be charged at a rate equivalent to the rate per hour of the contracted hours. This rate is calculated by taking the monthly contract cost and dividing by the max hours available for the month.

Customers may change the level of purchase to a higher tier at any time, the cost to change is simply the cost difference per month between packages X number of remaining months on the annual contract.

Professional Services - Standard Rate Card

Type of Resource	GBP (£) Standard Rates
Project Manager	150.00
Senior Solution Architect	155.00
Principal Consultant – HR	150.00
Principal Consultant – Finance	150.00
Principal Consultant – Technical	150.00
Implementation Consultant	150.00
Technical Consultant	155.00
Report Writer	120.00
Business / Systems Analyst	130.00
Developer	155.00
Junior Implementation Consultant	130.00

Your requirement

Proposed solution

Investment proposal without Global Consultancy access

The annual cost for the recommended support contract would be as follows:

Annual Consultancy Support (CaaS)	£
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Annual Extended Support	£
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Total Annual Cost (ex VAT):	£
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(VAT at the prevailing rate is payable under this agreement)

Investment proposal with Global Consultancy access

The annual cost for the recommended support contract would be as follows:

Annual Consultancy Support (CaaS)	£
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Annual Extended Support	£
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Total Annual Cost (ex VAT):	£
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(VAT at the prevailing rate is payable under this agreement)

Agreement period

The agreement period is 12 months and runs from xxxxxxxx to xxxxxxxxxx

Please note: Invoices are issued in advance

Terms and Conditions

1	Cancelling this Order This order can be cancelled by the customer at any time prior to delivery of the services. Days scheduled will be payable if cancellation takes place within 5 working days of delivery. Any expenses incurred prior to cancellation will be payable
2	Expenses Expenses will be charged separately at a fixed rate of £150 for each day a consultant spends at the customer's site or at an agreed alternative location. All expenses reasonably incurred whilst travelling internationally on behalf and with the prior written agreement of the customer will be recharged at cost; mileage will be charged at 50p per mile
3	Late Payment We will exercise our statutory right to charge interest under the Late Payments of Commercial Debts (Interest) Act 1998 and Late Payment of Commercial Debts Regulations 2013 if we are not paid in accordance with agreed credit terms
4	Invoice Queries Any invoice queries should be notified immediately via e-mail to accounts.emea@agilyxgroup.com
5	Services & Payment The customer is not outsourcing to Agilyx EMEA and Agilyx EMEA's obligations are limited to the provision of the service to be provided as described in Appendix 1. Each day of consultancy constitutes 7.5 hours working time. No charges will be made for each day worked in excess of 7.5 hours working time unless agreed in advance. 20 days net Payment Terms All prices are quoted exclusive of VAT
6	Copyright All of the content contained within PMBoK Project Management package is protected by copyright. None of the material or content should be copied or reproduced without the prior written consent of Agilyx EMEA Limited © 2021 copyright - all rights reserved @ Agilyx EMEA Limited

Appendix B – About Us

Company Overview



Agilyx Solutions ('Agilyx') is a global change-ready technology services company dedicated to delivering high-quality Unit4 ERP software implementations and services to commercial, public sector and not-for-profit organizations in the United States, Canada, the United Kingdom, New Zealand, Australia, and Asia.

As one of the largest ERP software suppliers worldwide, Unit4 provides industry-leading enterprise applications that empower people in service organisations. As Unit4's premier global partner for two (2) decades, we have delivered solutions to some of the largest Unit4 customers globally.

Our global company has over 150 employees worldwide and operates in North America, Australia, Asia, New Zealand and the United Kingdom. Our implementation consulting team makes up a significant portion of our total staff. We are very proud to have some of the best and brightest consultants working in our global family and we regularly move these consultants between our offices to provide the best possible service to our customers. Currently serving 240 customers worldwide and supporting over 280,000 users globally.

Our North American headquarters is located in Victoria, British Columbia.

As a systems integrator, our highly experienced and capable delivery team act as a single point of contact, and delivery across several technology stacks, offering a holistic project view, guiding our clients to optimal and tangible business outcomes. We have a trusted network of Technology Partners including Unit4, Salesforce, Vena, Cornerstone and Proactis.

As a cloud-first company, we have consistently demonstrated our commitment to data security by routinely achieving ISO27001 accreditation with a zero-non-conformance score — the highest rating achievable.

We, at our core, are an ideas organisation — we pride ourselves on challenging the status quo and delivering results for our customers using technology and inspired thinking. We have successfully delivered over 300 Enterprise implementations globally, spanning many different verticals with organisations from the mid-market to the large Enterprise.

Company History

Founded in 2001 by CEO John Catarinich and Director of Software Chris Develin, we have grown into a 150-person company across 7 countries. We are Unit4's largest and most accomplished Partner and have delivered sophisticated, integrated multi-tenant and private cloud solutions to high profile organisations in the United States, Canada, Australia, New Zealand, Asia and the United Kingdom. Our operations include software sales, consulting, maintenance and technical support as well as a full range of support services, such as professional consulting services to implement the full range of software and associated partner applications. We can provide custom software development services and currently provide

integration, web, bespoke application, extension software and mobile app development services to our customers.

Corporate Vision and Goals

We are committed to delivering digital ready business solutions through our service stack: business consulting, project management, supporting services and development. With local knowledge, inspired thinking and a healthy disrespect for the status quo, we deliver an unrivalled business transformation experience leveraging customer focused business solutions.

Our Vision is to empower our customers to embrace change simply, quickly and cost-effectively, through our agile approach, innovation and services.

Our Goal is to be known for the quality and innovation of our software, services and partnerships, the passion and skills of our people and the success of our customers - against a backdrop of 100% customer satisfaction and reference-ability.



Our Vision

Our vision is to empower our customers to embrace change simply, quickly and cost effectively, through our agile approach, innovation and unmatched services.



Our Goal

Our goal is to be known for the quality and innovation of our software, services and partnerships, the passion and skills of our people and the success of our customers.



Our Purpose

We are Change Ready.
We empower people at work to be their best, realise their potential and build better organisations and communities.

Information Security Statement

As a group, we are committed to ensuring the continuity of our business and to compliance with all applicable legislative and contractual requirements, policy pronouncements and internal controls to protect information in the conduct of our business.



In order to achieve these goals, we have established and are continually maintaining and improving our Information Security Management System (ISMS) in compliance with accepted international Standards in Information Security, ISO/IEC 27001:2013 "Information Technology - Security Techniques - Information Security Management Systems Requirements".

As part of the ISO 27001 certification journey, we submitted to extensive and thorough independent audits across our different business processes, and in 2015 our ISMS was certified as compliant with ISO/IEC 27001 requirements, we have achieved re-accreditation with zero non-conformances every year since our initial accreditation.

Our certified ISMS assures our customers that their data is secure throughout its lifecycle, and information security is integrated with all services we provide. Reviewed annually and communicated thoughtfully to all our stakeholders.

Agreement

To be completed by a representative of the customer

I hereby consent to abide by the terms of this service agreement:

Name/Position:	
Date:	
Signature:	

To be completed by a representative of Agilyx EMEA Limited

I hereby consent to abide by the terms of this service agreement:

Name/Position:	
Date:	
Signature:	