

BEST PRACTICE, BEST FIT



PPS G-Cloud Service Definition

About Project Plan Services (PPS)



HERE AT PROJECT PLAN SERVICES, OUR CUSTOMERS ARE OUR NUMBER ONE PRIORITY.

Project Plan Services (PPS) are one of the UK's most dynamic corporate portfolio, programme and project management specialists. Our expertise provides planning solutions that cover a broad spectrum of people, technology and process capabilities.

Established in 2008 and with years of experience, PPS has taken its unique style of project consultancy into the workplace, enabling corporate clients of all sizes to optimize their planning infrastructure and deliver clear benefits.

From the early stages of project initiation through to the complexities of project planning, execution and finally closure, PPS prides itself on talking your language, guaranteeing smooth project consultancy with the minimum of fuss. Offering continued support through demonstrations, training courses and day to day account management.

We are a Platinum Smartsheet Partner and reseller of Smartsheet and Resource Management licences. With expert consultants and training to assist every business. We are also Silver Office 365 partners with Microsoft Portfolio & Project Management competency. Offering tailored solutions using Microsoft Project, Online and Power BI.

PPS Methodology

Our client-focused approach to project delivery is described below and is typically implemented through an Agile fast-track approach to facilitate earlier user acceptance and rapid benefits.



SCOPE & DESIGN

Meeting with all stakeholders to understand all details and requirements of the proposed solution. Discussing all design options and how Smartsheet and/or other solutions will be implemented to deliver future-proof change for your organisation. This phase also includes our innovative Knowledge Assessment, working with your teams to understand the experience and skill level to tailor the Solution Services that are right for your business.



BUILD & CONFIGURE

Our Smartsheet and solution specialists will work to build and configure a solution that is accessible and fits seamlessly into your organisation with end users typically able to start using within just a few weeks. The build will include all formulas, automations and critical data to ensure you can hit the ground running to grow and evolve immediately.



PILOT

To ensure a smooth launch, the refined solution, templates, user guidelines will be piloted on live resources and projects. Care will be taken not to disrupt existing processes and parallel reporting will take place to ensure ongoing continuity during the pilot. The pilot will allow for testing and improvements to be made before the official solution goes live.



GO LIVE & ROLLOUT

On successful completion of the pilot, the solution will be fully rolled-out to the organisation. PPS will be on hand to assist you during this critical phase including the delivery of user training and guidelines to support a high adoption rate and effective use of the solution from day one.



ONGOING SPECIALIST SUPPORT

PPS offers both Ongoing and Specialist Support following the deployment of your Smartsheet solution. Supporting all users across all solution platforms by answering questions and queries ranging from core functionalities to advanced capabilities. Our Support allows all users to access flexible and valuable support and assistance directly from the PPS team. We know that your needs develop and evolve over time and what you want may expand once your solution has been deployed.

Our Services

At PPS, making things simple is at the heart of what we do, we strive to support you and your business wherever possible to ensure the best possible experience and effectiveness of your chosen solution. We offer core components that allow you to choose a package that helps you to support your staff and projects with relevant assistance and education.



ONGOING SPECIALIST SUPPORT

Going the extra mile, to support your users and teams, not only for the setup and onboarding of your Solution but day-to-day too. Supporting core functionalities and queries to advance capabilities and bespoke builds.

LEARNING & DEVELOPMENT

Offering tailored and bespoke face-to-face training sessions for all levels on our Solutions and Core Skills, delivered by our in-house qualified training team. Whilst also offering online, self-service e-learning courses for continuous development

PROFESSIONAL SERVICES & CONSULTANCY

Working on bespoke and custom services such as solution builds and implementation that are the perfect fit for your organisation. Ensuring new solutions are integrated with your existing way of working for a seamless adoption with your team.

KNOWLEDGE ASSESSMENT

Helping you to understand the needs, experience and competency levels of your staff so we can tailor the support and service we provide, ensuring it is the best fit for your business, making every element useful and valuable.

HEALTH CHECK REVIEW

Aimed at existing users of Smartsheet who wish to explore deeper the full and very latest capabilities to help them with their day-to-day business challenges. Health Check Reviews are a complimentary service offered by PPS.

Customer Success Programme



At PPS, our clients are our number one focus and we are proud to offer tailored support to your business and teams to ensure high levels of adoption and engagement with your chosen solution to support ROI. Our Customer Success Programme is part of every customer's journey when working with PPS.

Our Customer Success Programme aims to provide you with ongoing guidance to ensure you get the most out of your investment, mitigating your concerns over team engagement and usage of your solution. We are on hand from onboarding through launch to implementation and day-to-day business activity. We will share educational and supportive platform content with your users that will allow them to gain confidence in using your solution and all the diverse functionalities available to them. Every session will provide you with practical advice and guidance as to how to approach new challenges and boost user engagement for optimal ROI.

Allowing us to go the extra mile with System Admin access

We are here to support you from the very beginning, which includes managing the time-consuming tasks for you, such as user upload and licence allocation. Aren't sure which permissions you want each user to have? Want to customise the branding to align with your organisation? Keen to understand the engagement and usage levels of your licenced users? We are here every step of the way so your investment works hard for your business from the outset. To do this, your Customer Success Manager needs System Admin access which allows us to be on hand with all user and sheet management questions and problem-solving. This access does not impact the number of licences allocated to you and access is only used by your Customer Success Manager, taking your business's security and trust very seriously.

Our Clients

We are proud to present a selection of clients we have had the pleasure of working with across project planning and management, technology and software consultancy.



"We wouldn't be where we are now without the support and work from PPS. They provided the expertise that we didn't have before, to get things done quickly." **STOCKPORT COUNCIL**

"I found the dynamic style of Rob's training really beneficial. We quickly built a rapport and this was extremely helpful working through the training sessions." **QUEEN MARY'S UNIVERSITY**

"What we have now is a really clear approach that gives every one of our six regions and our global support centre level a really clean way of being able to see information and most importantly, the trends because that's what we were missing before." **WORLD ORGANISATION OF THE SCOUT MOVEMENT**

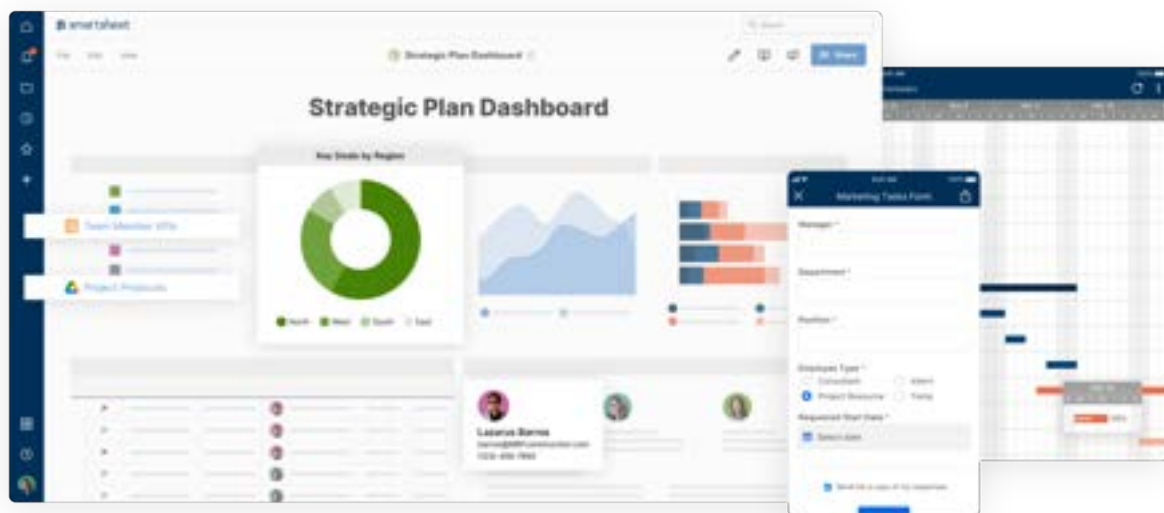
"Rob spent time getting to understand our requirements and tailored the training appropriately. More support was given to topics when needed and the training materials were comprehensive." **EPIC**

Smartsheet The Dynamic Work Platform

Smartsheet connects the business on a flexible, no-code platform that empowers anyone to create the solution they need with the control and security IT demands.

From collaboration tools that keep teams aligned to intelligent workflows that drive productivity, to end-to-end solutions for content and resource management, Smartsheet empowers the entire enterprise to make an impact.

With powerful core capabilities, a selection of pre-built templates and solutions, and premium add-on products and services, Smartsheet makes it easy for you to move faster and achieve more.



SCHEDULE WORK

Build project timelines and Gantt Charts easily, as one-off projects or repeating templates

GAIN REAL-TIME INSIGHT

Management dashboards and detailed reporting in real-time

MANAGING RESOURCES

Simple but powerful resource planning and monitoring capability

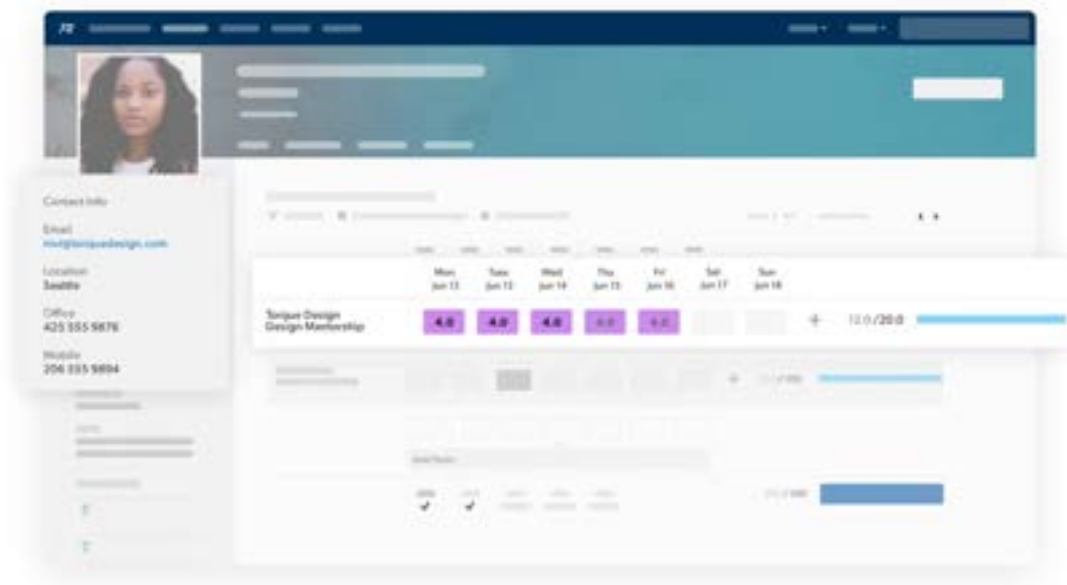
COLLABORATE EASILY

Empower people and teams to easily take charge of their part of the work

Resource Management by Smartsheet

Resource Management by Smartsheet is a resource and project portfolio planning solution that allows you to see and act on critical data about your team's capacity across your organisation's entire portfolio of work.

The simple and powerful design makes it easy to build the best team for the job, keep project schedules and budgets on track, and confidently forecast business needs with real-time reporting. With Smartsheet and Resource Management by Smartsheet organisations can stay focused on the big picture while also executing all the moving parts of every project to stay on track and achieve more.



INTEGRATING DIRECTLY WITH SMARTSHEET

Access your team's availability and resourcing plan, directly from your Smartsheet project sheet to manage the full lifecycle of your projects. See who's been assigned, request the right people for the job, and get a real-time preview of the impact of changes as you move through the project allowing you to make educated changes and updates along the way.

INTERACTIVE USER EXPERIENCE

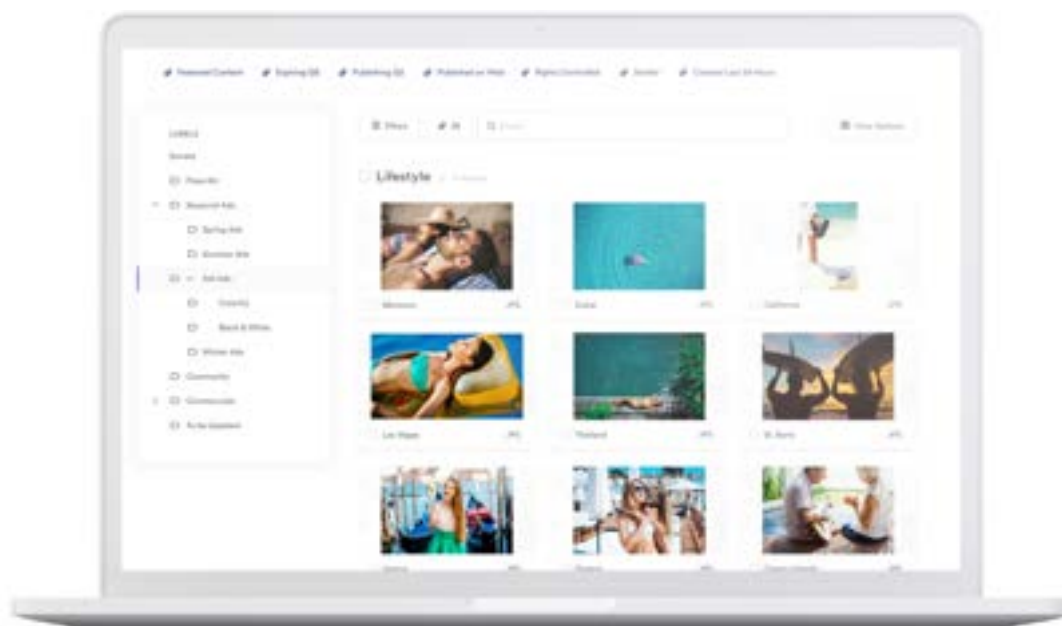
An interactive schedule with a drag + drop user-interface that features visual controls and require minimal data entry, making it easy to dynamically resource and forecast in real-time.

VISIBILITY INTO AVAILABILITY

Have full visibility of who is in or out of the office, what they're working on, who has availability and who is overloaded. Giving you the understanding and knowledge to better plan your projects, the timelines and the budget needed.

Brandfolder - The #1 Digital Asset Management Platform

Brandfolder is the ultimate solution for managing and sharing your brand assets. With this powerful digital asset management (DAM) platform, you can easily store, organise, and distribute your logos, images, videos, and other digital assets to your entire organisation. Brandfolder's intuitive user interface makes it easy to find and download the assets you need, and its robust permission settings ensure that only authorised users can access sensitive content. Plus, with built-in analytics, you can track how your assets are being used and make data-driven decisions to optimise your brand strategy.



AN INTUITIVE WAY TO FIND WHAT YOU NEED, FAST

Brandfolder helps marketers and creatives manage and distribute all of their assets, and understand how they're performing. Your team likely wastes dozens of hours a week finding assets. Brandfolder makes it easy for users to access assets from an intuitive, cloud-based, single source of truth.

AN EASY WAY TO SHARE YOUR BRAND'S ASSETS

Simplify brand asset distribution by sharing assets or even your entire Brandfolder with robust privacy controls and user-level permissions. Brandfolder supports all file formats, including images, video, audio and documents in a wide array of file types.

UNDERSTAND WHAT'S WORKING

Find content quicker, allow your teams to work on more strategic projects, and make your creative and marketing budget more effective. Using proprietary AI and ML technologies, Brand Intelligence shows you who is using your assets, where they're being used, and what your highest-performing assets are.

GETTING STARTED

PPS SOLUTION SERVICES PACKAGE

BEST PRACTICE, BEST FIT

Whether you have no experience of using Smartsheet or you are still familiarising yourself with the key features, Getting Started will help you navigate and use the fundamentals to help you in your journey with using this amazing piece of technology. Helping to structure and share your data and collaborating in real-time.

HIGHLIGHTS



EXPERT
TRAINERS



ACCESS TO
ONLINE LEARNING



DEDICATED
ACCOUNT MANAGER



TAILORED
CONTENT



10HRS ONGOING
SUPPORT



FACE TO FACE
TRAINING

CONTENT COVERED

- CREATING SHEETS
- ROW AND HIERARCHY
- COLUMNS
- ATTACHMENTS
- COMMUNICATIONS VIA CONVERSATIONS
- CONDITIONAL FORMATTING
- FORMULA BASICS
- SHARING
- CONTACTS
- VIEWS (CARD/GANTT/CALENDAR)

TIMELINE

KNOWLEDGE ASSESSMENT

A complimentary assessment carried out by our Learning and Development Manager to ensure this is the right training for you and your staff based on their skills and experience.

PROFESSIONAL SERVICES*

If required, working with the consultancy team to build and implement a custom system that supports your existing workflow

3 HOUR GETTING STARTED TRAINING COURSE

Held via Teams or Zoom for up to 6 people at a time to ensure optimum time for questions and to tailor each user

ONGOING SUPPORT

10 hours of ongoing support that helps users with questions and queries from logging on to correcting a formula

ONLINE LEARNING - GETTING STARTED

Available to access for 12-months to support continued learning and as a resource following the training course

*Professional Services are not included in the base package. Available to add on following a consultation.

OPTIMISING

PPS SOLUTION SERVICES PACKAGE

BEST PRACTICE, BEST FIT

With some experience in using project management platforms, this package will help you take your skillset and use of Smartsheet to the next stage. Optimising will help you to work best practice principles and use Smartsheet to save time and streamline workflows.

HIGHLIGHTS



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ACCESS TO
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DEDICATED
ACCOUNT MANAGER



TAILORED
CONTENT



10HRS ONGOING
SUPPORT



FACE TO FACE
TRAINING

CONTENT COVERED

- FORMS
- TRACK AND VIEW ACTIVITY
- SORTING AND FILTERING
- AUTOMATION
- ALERTS AND REMINDERS
- UPDATE REQUESTS
- APPROVAL REQUESTS
- MOVING AND COPYING ROWS
- CELL LINKING
- REPORTS
- SHEET SUMMARY AND SHEET SUMMARY REPORTS

TIMELINE

KNOWLEDGE ASSESSMENT

A complimentary assessment carried out by our Learning and Development Manager to ensure this is the right training for you and your staff based on their skills and experience.

PROFESSIONAL SERVICES*

If required, working with the consultancy team to build and implement a custom system that supports your existing workflow

4.5 HOUR OPTIMISING TRAINING COURSE

Held via Teams or Zoom for up to 6 people at a time to ensure optimum time for questions and to tailor each user

ONGOING SUPPORT

10 hours of ongoing support that helps users with questions and queries from logging on to correcting a formula

ONLINE LEARNING - GETTING STARTED & OPTIMISING

Available to access for 12-months to support continued learning and as a resource following the training course

*Professional Services are not included in the base package. Available to add on following a consultation.

BECOMING THE EXPERT

PPS SOLUTION SERVICES PACKAGE

BEST PRACTICE, BEST FIT

Helping you build and present data using Dashboards/Portals, taking your use of Smartsheet to the next level. You can also benefit from using the project management setting to enable more control on the projects you are managing and use the proofing tool for further collaboration.

HIGHLIGHTS



EXPERT
TRAINERS



ACCESS TO
ONLINE LEARNING



DEDICATED
ACCOUNT MANAGER



TAILORED
CONTENT



10HRS ONGOING
SUPPORT



FACE TO FACE
TRAINING

CONTENT COVERED

- CROSS-SHEET FORMULAS
- ADVANCED CROSS-SHEET FORMULAS
- DASHBOARDS AND PORTALS
- CHARTS IN DASHBOARDS
- GANTT CHART WITH DEPENDENCIES
- PROJECT MANAGEMENT SETTINGS
- RESOURCE MANAGEMENT
- CRITICAL, SUMMARY AND DRIVING PATHS
- DOCUMENT BUILDER
- PROOFING
- WORKAPPS

TIMELINE

KNOWLEDGE ASSESSMENT

A complimentary assessment carried out by our Learning and Development Manager to ensure this is the right training for you and your staff based on their skills and experience.

PROFESSIONAL SERVICES*

If required, working with the consultancy team to build and implement a custom system that supports your existing workflow

5 HOUR EXPERT TRAINING COURSE

Held via Teams or Zoom for up to 6 people at a time to ensure optimum time for questions and to tailor each user

ONGOING SUPPORT

10 hours of ongoing support that helps users with questions and queries from logging on to correcting a formula

ONLINE LEARNING - GETTING STARTED & OPTIMISING

Available to access for 12-months to support continued learning and as a resource following the training course

*Professional Services are not included in the base package. Available to add on following a consultation.

ONGOING SUPPORT

PPS SOLUTION SERVICES

BEST PRACTICE, BEST FIT

Going the extra mile, PPS provide Ongoing Support not only for the setup and onboarding of Smartsheet in your organisation but also day-to-day support for the users. From simple enquiries regarding logging in to questions related to the core platform capabilities, and give you guidance on how to effectively use Smartsheet.



DEDICATED
ACCOUNT MANAGER



TAILORED NUMBER OF
HOURS TO SUIT YOU



SUITABLE FOR ALL
USER EXPERIENCE

COVERING CORE PLATFORM CAPABILITIES

BASIC SHEET FUNCTIONALITY
PROOFING
DOCUMENT BUILDER
FORMATTING
FORMS
FORMULAS
IMPORTING / EXPORTING

SHARING AND PUBLISHING
SMARTSHEET REPORTS
DASHBOARDS
ADMIN CENTER
AUTOMATIONS
PROJECT SETTINGS
RESOURCE MANAGEMENT

All licenced users across your organisation who are using Smartsheet have access to Ongoing Support. Meaning you don't have any restrictions per staff member, ensuring optimum effectiveness and efficiency.

ADDITIONAL SERVICES



FACE TO FACE
TRAINING



ACCESS TO
ONLINE LEARNING



KNOWLEDGE
ASSESSMENT



PROFESSIONAL
SERVICES



SPECIALIST SUPPORT

SPECIALIST SUPPORT

PPS SOLUTION SERVICES

BEST PRACTICE, BEST FIT

Our Specialist Support is dedicated to providing tailored and bespoke support based on the solution that has been delivered to your organisation. We know that your needs develop and evolve over time and what you want may expand once your solution has been deployed. Specialist Support provides continued care and development to support your growth and success.



DEDICATED
ACCOUNT MANAGER



TAILORED NUMBER OF HOURS
TO SUIT YOUR SOLUTION



ADVANCED PLATFORM
FUNCTIONALITIES

COVERING SPECIALIST PLATFORM CAPABILITIES INCLUDING

USER MANAGEMENT
PERSONAL SETTINGS
LICENSING AND MERGING ACCOUNTS
DATA CONNECTION & INTEGRATIONS
JIRA & SALESFORCE CONNECTORS
DATA SHUTTLE
SECURE REQUEST MANAGEMENT
DYNAMIC VIEW

CALENDAR APP
DATAMESH
PIVOT APP
WORKAPPS
PROCESS AND PORTFOLIO MANAGEMENT
CONTROL CENTER
ALL BESPOKE AND CUSTOM BUILDS
DELIVERED BY PROFESSIONAL SERVICES

ADDITIONAL SERVICES



FACE TO FACE
TRAINING



ACCESS TO
ONLINE LEARNING



KNOWLEDGE
ASSESSMENT



PROFESSIONAL
SERVICES



ONGOING SUPPORT

KNOWLEDGE ASSESSMENT

PPS SOLUTION SERVICES

BEST PRACTICE, BEST FIT

We offer a complimentary Knowledge Assessment to ensure the support and service we provide is right for your business, making every element useful and valuable. Meaning you can enrol your team on the best course that suits their needs, experience and competency levels with project management platforms and software.

OBJECTIVES

- Helping you to identify and overcome current pain points and issues that are holding up growth
- Enable users to better understand existing capabilities of Smartsheet that can be applied straight away
- Understand which key add-on features are available for extending Smartsheet with other business systems
- Recognise potential needs for additional, supplementing Solution Services including support and learning and development

TOPICS

- Current usage and challenges
- Latest features and capabilities to support your goals
- Resource Management by Smartsheet
- Control Centre/Accelerators
- Connectors & integrations e.g. JIRA, Salesforce, Microsoft Teams

FORMAT

Delivered with interactive sessions, demonstrations and guidance from the PPS Consultancy Team who have proven industry experience of using Smartsheet to help deliver real business change projects and programmes.

ADDITIONAL SERVICES



FACE TO FACE
TRAINING



ACCESS TO
ONLINE LEARNING



KNOWLEDGE
ASSESSMENT



PROFESSIONAL
SERVICES



ONGOING &
SPECIALIST SUPPORT

LAUNCH 10

SOLUTION SERVICES

BEST PRACTICE, BEST FIT

Our Launch 10 package is an accessible way to ensure you can start gaining momentum with your new solution, fast. In these valuable 10 hours, we will work with you to identify key tasks and activities and work towards their completion.

OBJECTIVES

- Developing individual sheets, reports, forms and portals within 10 hours
- Optimising existing sheets, reports, portals & dashboards, or formulas
- Developing or refining Smartsheet workflow automations
- Providing knowledge transfer & advising on best practices tailored toward specific client needs

WHO IS IT FOR?

- Those wanting a basic PPM solution, e.g. Project Plan, Risk Log, Budget Sheet linked to a simple project portal/dashboard. Alternatively, simple KPI reporting and portals for up to 3 sheets, 3 reports and 1 dashboard
- Extracting more information from existing sheets to display on portals and dashboards
- Notifications, alerts, approval workflows, simple forms

What this package doesn't cover:

Project to Programme linking, inter-sheet linking, more advanced summary sheets. As well as any services related to Smartsheet Advance packages, e.g. Control Center. Please enquire about our **Fastrack Packages** for information on these functionalities.

ADDITIONAL SERVICES



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KNOWLEDGE
ASSESSMENT



PROFESSIONAL
SERVICES



ONGOING &
SPECIALIST SUPPORT

LAUNCH 20

SOLUTION SERVICES

BEST PRACTICE, BEST FIT

Our Launch 20 package will help you plan, implement, and launch a successful solution. Building dashboards will consolidate the reporting and presentation of operational KPIs for your business. We will work with you in these 20 hours to refine, review and test before implementation so you can focus on driving long-term results.

OBJECTIVES

- Developing more complex solutions utilising more advanced Smartsheet functionality within 20 hours
- Developing advanced Smartsheet workflow automations
- Smartsheet Document Generator (using client generated fillable pdf documents)
- Providing knowledge transfer & advising on best practices tailored toward specific client needs.

WHO IS IT FOR?

- Those wanting a PPM solution including portfolio and programme reporting & dashboards, using manual linking of sheets. Summary and roll up sheets, reporting & dashboards
- Multiple approvals, moving and copying rows between sheets, archiving data, forms with logic
- Reports and client facing pdf documentation incorporating data contained within sheets

What this package doesn't cover:

Any services related to Smartsheet Advance packages and Control Center
Please enquire about our **Fastrack PPM and Fastrack Control Center** packages for information on these functionalities.

ADDITIONAL SERVICES



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PROFESSIONAL
SERVICES



ONGOING &
SPECIALIST SUPPORT

FASTRACK - PPM

SOLUTION SERVICES

BEST PRACTICE, BEST FIT

Our Fastrack PPM is the ultimate package for businesses who want to implement a fully comprehensive PPM solution of up to 50 projects a year. Using pre-configured templates we will set up complete portfolio, project and programme reporting with dashboards all with your business branding.

OBJECTIVES

- Developing project sheets, reports & dashboards to provide portfolio & project metrics & information
- Project sheets including project plans, project costs, risk & issue logs, and actions & decisions logs
- Visibility across business operational KPIs through automated dashboards with the ability to present to stakeholders with ease

WHO IS IT FOR?

- Small to medium sized businesses looking for a Project Portfolio Management (PPM) solution for up to 50 projects per year
- Those requiring a low cost but effective PPM solution with fast implementation & minimal administration
- Those with Smartsheet Advance (excluding Control Center) who are looking to utilise its vast and powerful functionalities.

What this package doesn't cover:

Smartsheet PPM solutions utilising Control Center. Please enquire about our **Fastrack Control Center** package for further support on this platform.

ADDITIONAL SERVICES



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SERVICES



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FASTRACK - CONTROL CENTER

SOLUTION SERVICES

BEST PRACTICE, BEST FIT

Our Fastrack Control Center package is designed for specialist PPM for businesses looking to implement Smartsheet Control Center. We will plan, set up and implement your solution using one Blueprint supporting the build with all the testing and automation required to elevate the success of your business.

OBJECTIVES

- A fully comprehensive Project Portfolio Management solution for those with over 50 projects per year harnessing Smartsheet Control Center
- Developing project sheets, reports & dashboards to provide portfolio & project metrics & information
- Project sheets including project plans, project costs, risk & issue logs, and actions & decisions logs
- Control Center builds on the core value of Smartsheet to deliver project consistency and visibility at scale by automating project creation, managing change, and aggregating portfolio reporting

WHO IS IT FOR?

- Medium and Large organisations requiring a low cost, fast turnaround Project Portfolio Management (PPM) solution
- Organisations with licenced access to Smartsheet Control Center

What this package doesn't cover:

Multiple Control Center Blueprints (Smartsheet template sets). This package is for a single Blueprint only. Please enquire to find out how we can support you with multiple Blueprints.

ADDITIONAL SERVICES



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SERVICES



ONGOING &
SPECIALIST SUPPORT

Application and entire agreement

1. These Terms and Conditions apply to the provision of the services detailed in our quotation (**Services**) by Allen Reid Limited (Trading as Project Plan Services) a company registered in England and Wales under number 3684767 whose registered office is at 4 Helmsley Road, Boston Spa, West Yorkshire, LS23 6NW (**we or us or Service Provider**) to the person buying the services (**you or Customer**).
2. You are deemed to have accepted these Terms and Conditions when you accept our quotation or from the date of any performance of the Services (whichever happens earlier) and these Terms and Conditions and our quotation (**the Contract**) are the entire agreement between us.
3. You acknowledge that you have not relied on any statement, promise or representation made or given by or on our behalf. These Conditions apply to the Contract to the exclusion of any other terms that you try to impose or incorporate, or which are implied by trade, custom, practice or course of dealing.

Interpretation

4. A "business day" means any day other than a Saturday, Sunday or bank holiday in England and Wales.
5. The headings in these Terms and Conditions are for convenience only and do not affect their interpretation.
6. Words imparting the singular number shall include the plural and vice-versa.

Services

7. We warrant that we will use reasonable care and skill in our performance of the Services which will comply with the quotation, including any specification in all material respects. We can make any changes to the Services which are necessary to comply with any applicable law or safety requirement, and we will notify you if this is necessary.
8. We will use our reasonable endeavours to complete the performance of the Services within the time agreed or as set out in the quotation; however, time shall not be of the essence in the performance of our obligations.
9. All of these Terms and Conditions apply to the supply of any goods as well as Services unless we specify otherwise.

Your obligations

10. You must obtain any permissions, consents, licences or otherwise that we need and must give us with access to any and all relevant information, materials, properties and any other matters which we need to provide the Services.
11. If you do not comply with clause 10, we can terminate the Services.
12. We are not liable for any delay or failure to provide the Services if this is caused by your failure to comply with the provisions of this section (**Your obligations**).

Fees

13. The fees (**Fees**) for the Smartsheet licence subscriptions are due within 30 days of the Invoice date ie the Due Date.
14. The Fees for our support packages and training courses are due within 30 days of the Invoice date ie the Due Date.
15. The Fees for our Professional Services are due within 30 days of the invoice date i.e. the Due Date unless a payment schedule was agreed for each project prior to invoicing.
16. Should a monthly payment schedule have been agreed this will be shown on the proposal prior to signing. Failure to adhere to the schedule agreed by way of missed or late payments, or incorrect amounts will result in the remaining balance becoming due with immediate effect.
17. In addition to the Fees, we can recover from you a) reasonable incidental expenses including, but not limited to, travelling expenses, hotel costs, subsistence and any associated expenses, b) the cost of services provided by third parties and required by us for the performance of the Services, and c) the cost of any materials required for the provision of the Services.
18. You must pay us for any additional services provided by us that are not specified in the quotation in accordance with our then current, applicable daily rate in effect at the time of performance or such other rate as may be agreed between us. The provisions of clause 14 also apply to these additional services.

19. The Fees are inclusive of any applicable VAT and other taxes or levies which are imposed or charged by any competent authority.

Cancellation and amendment

19. We can withdraw, cancel or amend a quotation if it has not been accepted by you, or if the Services have not started, within a period of 30 days from the date of the quotation, (unless the quotation has been withdrawn).

20. Either we or you can cancel an order for any reason prior to your acceptance (or rejection) of the quotation.

21. If you want to amend any details of the Services you must tell us in writing as soon as possible. We will use reasonable endeavours to make any required changes and additional costs will be included in the Fees and invoiced to you.

22. If you do not wish to renew your Smartsheet subscription when it is due for renewal you must inform us in writing no later than 45 calendar days before the subscription renewal date.

23. If, due to circumstances beyond our control, including those set out in the clause below (**Circumstances beyond a party's control**), we have to make any change in the Services or how they are provided, we will notify you immediately. We will use reasonable endeavours to keep any such changes to a minimum.

Payment

24. We will invoice you for payment of the Fees either:

- a. when we have completed the Services; or
- b. on the invoice dates set out in the quotation.

25. You must pay the Fees due within 30 days of the date of our invoice or otherwise in accordance with any credit terms agreed between us.

26. Time for payment shall be of the essence of the Contract.

27. We will exercise our statutory right to claim interest (at 8% over the Bank of England base rate) and compensation for debt recovery costs under the Late Payment legislation if we are not paid according to our agreed terms. In addition to any interest that is owed on late payments, you will also be liable for Late Payment fees for each individual invoice that is not paid within our terms. All Late Payment charges will need to be settled with the original invoice amount, if not already paid, within 5 working days of issue, failure to do so will result in the details getting passed to a debt recovery service.

28. All payments due under these Terms and Conditions must be made in full without any deduction or withholding except as required by law and neither of us can assert any credit, set-off or counterclaim against the other in order to justify withholding payment of any such amount in whole or in part.

29. If you do not pay within the period set out above, we can suspend any further provision of the Services and cancel any future services which have been ordered by, or otherwise arranged with, you.

30. Receipts for payment will be issued by us only at your request.

31. All payments must be made in British Pounds unless otherwise agreed in writing between us.

Sub-contracting and assignment

32. We can at any time assign, transfer, charge, subcontract or deal in any other manner with all or any of our rights under these Terms and Conditions and can subcontract or delegate in any manner any or all of our obligations to any third party.

33. You must not, without our prior written consent, assign, transfer, charge, subcontract or deal in any other manner with all or any of your rights or obligations under these Terms and Conditions.

Termination

34. We can terminate the provision of the Services immediately if you:

- a. commit a material breach of your obligations under these Terms and Conditions; or
- b. fail to make pay any amount due under the Contract on the due date for payment; or
- c. are or become or, in our reasonable opinion, are about to become, the subject of a bankruptcy order or take advantage of any other statutory provision for the relief of insolvent debtor; or
- d. enter into a voluntary arrangement under Part 1 of the Insolvency Act 1986, or any other scheme or arrangement is made with its creditors; or

- e. convene any meeting of your creditors, enter into voluntary or compulsory liquidation, have a receiver, manager, administrator or administrative receiver appointed in respect of your assets or undertakings or any part of them, any documents are filed with the court for the appointment of an administrator in respect of you, notice of intention to appoint an administrator is given by you or any of your directors or by a qualifying floating charge holder (as defined in para. 14 of Schedule B1 of the Insolvency Act 1986), a resolution is passed or petition presented to any court for your winding up or for the granting of an administration order in respect of you, or any proceedings are commenced relating to your insolvency or possible insolvency.

Intellectual property

35. We reserve all copyright and any other intellectual property rights which may subsist in any goods supplied in connection with the provision of the Services. We reserve the right to take any appropriate action to restrain or prevent the infringement of such intellectual property rights.

Liability and indemnity

36. Our liability under these Terms and Conditions, and in breach of statutory duty, and in tort or misrepresentation or otherwise, shall be limited as set out in this section.

37. The total amount of our liability is limited to the total amount of Fees payable by you under the Contract.

38. We are not liable (whether caused by our employees, agents or otherwise) in connection with our provision of the Services or the performance of any of our other obligations under these Terms and Conditions or the quotation for:

- a. any indirect, special or consequential loss, damage, costs, or expenses or;
- b. any loss of profits; loss of anticipated profits; loss of business; loss of data; loss of reputation or goodwill; business interruption; or, other third party claims; or
- c. any failure to perform any of our obligations if such delay or failure is due to any cause beyond our reasonable control; or
- d. any losses caused directly or indirectly by any failure or your breach in relation to your obligations; or
- e. any losses arising directly or indirectly from the choice of Services and how they will meet your requirements or your use of the Services or any goods supplied in connection with the Services.

39. You must indemnify us against all damages, costs, claims and expenses suffered by us arising from any loss or damage to any equipment (including that belonging to third parties) caused by you or your agents or employees.

40. Nothing in these Terms and Conditions shall limit or exclude our liability for death or personal injury caused by our negligence, or for any fraudulent misrepresentation, or for any other matters for which it would be unlawful to exclude or limit liability.

Data protection

41. When supplying the Services to the Customer, the Service Provider may gain access to and/or acquire the ability to transfer, store or process personal data of employees of the Customer.

42. The parties agree that where such processing of personal data takes place, the Customer shall be the 'data controller' and the Service Provider shall be the 'data processor' as defined in the General Data Protection Regulation (GDPR) as may be amended, extended and/or re-enacted from time to time.

43. For the avoidance of doubt, 'Personal Data', 'Processing', 'Data Controller', 'Data Processor' and 'Data Subject' shall have the same meaning as in the GDPR.

44. The Service Provider shall only Process Personal Data to the extent reasonably required to enable it to supply the Services as mentioned in these terms and conditions or as requested by and agreed with the Customer, shall not retain any Personal Data longer than necessary for the Processing and refrain from Processing any Personal Data for its own or for any third party's purposes.

45. The Service Provider shall not disclose Personal Data to any third parties other than employees, directors, agents, sub-contractors or advisors on a strict 'need-to-know' basis and only under the same (or more extensive) conditions as set out in these terms and conditions or to the extent required by applicable legislation and/or regulations.

46. The Service Provider shall implement and maintain technical and organisational security measures as are required to protect Personal Data Processed by the Service Provider on behalf of the Customer.

47. Further information about the Service Provider's approach to data protection are specified in its Data Protection Policy, which can be found at https://www.projectplanservices.co.uk/_files/ugd/428985_acae32ca1fa849fbac578a5deb438437.pdf?index=true. For any enquiries or complaints regarding data privacy, you can email: solutions@projectplanservices.co.uk.

48. As we develop the support and services we offer to our clients, we are growing our focus on creating a community of users across the platforms available. As part of our service to you, your organisation and staff who are using the delivered solution, we

want to share educational content such as articles and webinars along with top tips for using your solution and platform including Smartsheet. This is to enhance the service you receive as well as encouraging ongoing learning, adoption rate and engagement with the platform that you have invested in. To do this, we want to communicate to all users directly via email as part of extending our service and support to you and your business. Everyone can update their preferences or unsubscribe at any time and the use of their contact details are strictly for the aforementioned purpose and only handled internally by the PPS Team. We look forward to growing and developing our service to you and your organisation.

Circumstances beyond a party's control

49. Neither of us is liable for any failure or delay in performing our obligations where such failure or delay results from any cause that is beyond the reasonable control of that party. Such causes include, but are not limited to: industrial action, civil unrest, fire, flood, storms, earthquakes, acts of terrorism, acts of war, governmental action or any other event that is beyond the control of the party in question. If the delay continues for a period of 90 days, either of us may terminate or cancel the Services to be carried out under these Terms and Conditions.

Communications

50. All notices under these Terms and Conditions must be in writing and signed by, or on behalf of, the party giving notice (or a duly authorised officer of that party).

51. Notices shall be deemed to have been duly given:

- a. when delivered, if delivered by courier or other messenger (including registered mail) during the normal business hours of the recipient;
- b. when sent, if transmitted by fax or email and a successful transmission report or return receipt is generated;
- c. on the fifth business day following mailing, if mailed by national ordinary mail; or
- d. on the tenth business day following mailing, if mailed by airmail.

52. All notices under these Terms and Conditions must be addressed to the most recent address, email address or fax number notified to the other party.

No waiver

53. No delay, act or omission by a party in exercising any right or remedy will be deemed a waiver of that, or any other, right or remedy nor stop further exercise of any other right, or remedy.

Severance

54. If one or more of these Terms and Conditions is found to be unlawful, invalid or otherwise unenforceable, that / those provisions will be deemed severed from the remainder of these Terms and Conditions (which will remain valid and enforceable).

Law and jurisdiction

55. This Agreement shall be governed by and interpreted according to the law of England and Wales and all disputes arising under the Agreement (including non-contractual disputes or claims) shall be subject to the exclusive jurisdiction of the English and Welsh courts.