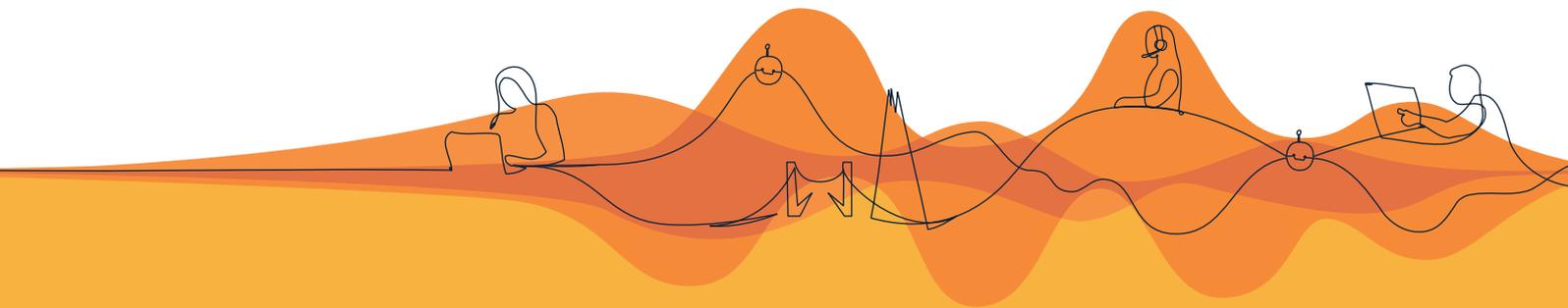




enate

SIMPLE WORKFLOW, POWERFUL INSIGHTS



INDUSTRY GUIDE

Understanding our Customer Success Services

ENATE SAAS CUSTOMER SUCCESS PLANS SUMMARY

We know that the best way to ensure that you can maximise the benefit of using Enate is by us providing the right level of support across the lifetime of our relationship.

That's why we have dedicated Customer Success Plans to deliver end to end assistance when you need it-covering the Enate Platform itself plus Enate Helpdesk and Enate Learning.

We have two plans "Essential" or "Ultimate" to choose from depending upon your needs. The table below summarises these plans, the rest of this document goes into each service in more detail:

	Essential	Ultimate
Enate Platform		
Availability	24x7	24x7
Availability Service Level	99.5%	99.5%
Availability Service Level Hours	Monday to Friday 9am IST to 5:30pm UK time	Monday 9am China Time to Friday 5:00pm Pacific Time
Enate Helpdesk Service		
Working Hours	Monday to Friday 9am IST - 5:30pm UK time	Monday 9am China Time to Friday 5:00pm Pacific Time
Enate Helpdesk Targets		
Critical Incidents Response Target	2 working hours	2 hours
Critical Incident Resolution Target	4 working hours	4 hours
Major Incident Response Target	4 working hours	4 working hours
Major Incident Resolution Target	16 working hours	16 working hours
Service Reporting		
Service reports	Quarterly	Monthly
Customer Success Review	No	Quarterly
Customer Advisory Council	No	Annual
Community		
Enate Academy	Yes	Yes
Community Edition	Single Instance	2 Instances
Community Support (via Forum)	Reasonable endeavours	2 day response
Forum Availability	Yes	Yes
Feature Request / Feedback	Yes	Yes

ENATE HELPDESK SERVICE

Enate provides a helpdesk service for you to report Incidents and for us to communicate progress in resolving them.

What is the Helpdesk for?

The Enate Helpdesk is available for you to report incidents. An incident is where the Enate service or product is not working as you expect and is causing a problem for your business. The picture below shows how the Enate helpdesk works and the different parties / teams involved in the end-to-end support chain.



Who are they?

Super users work for you and are part of your operations team. They are more deeply trained and experienced than other users and are deeply familiar with your processes.

The centre of excellence might be a special team within your business, it might be part of your support desk or it might be provided by an Enate implementation Partner.

The Enate Helpdesk is provided by Enate and staffed by our support experts. The Enate Helpdesk co-ordinates other Enate resources required to resolve incidents.

What are they responsible for?

Resolves incident related to End Users lack of understanding and knowledge of the Enate system and customer processes configured in Enate.

Resolves incidents related to the configuration of Enate including processes, business rules, custom cards and users.

Resolves incidents related to the core Enate service that require changes to the infrastructure, hardware or software to address.

To access the Enate Helpdesk you must maintain appropriate numbers of trained Super Users (normally a ratio of 1:50) and must designate the Centre of Excellence (CoE) responsible for expert support on the Enate configuration. The Centre of Excellence must have at least one certified Enate Technical Specialist and at least 1 certified Enate Solution Consultant. If you cannot operate a CoE of your own, you should contract for this service from an Enate Implementation Partner.

If after reasonable commercial efforts the CoE is unable to diagnose or resolve the incident, or if the CoE believes that the incident is clearly the responsibility of the Enate Helpdesk, the CoE may contact the Enate Helpdesk. The Enate Helpdesk is accessed through the Enate support portal and can be accessed by designated members of the CoE.

The Enate Helpdesk will work with you to resolve the incident within the times set out in the Service Levels and Service Credits schedule.

HOW ARE INCIDENTS CATEGORISED?

When Incidents are reported to the Enate Helpdesk they will be categorised into one of 3 severities:

Severity	Definition
Critical	<p>The incident requires immediate attention because urgent work cannot be done and the malfunction may cause serious losses. The situation is an emergency and there is no available interim solution, approach or workaround available to you that mitigates the impact of the incident. Critical incidents display one or more of the following characteristics:</p> <ul style="list-style-type: none">▶ The incident prevents a significant proportion of the user base from using the platform to do their jobs.▶ The incident causes irreversible data corruption.▶ The incident is a malicious cyber-attack that threatens the integrity or availability of the Platform.▶ The incident causes a total inability to deliver a time critical service to more than one End User Customer or a significant proportion of service recipients. <p>Note:</p> <p>You must provide Enate with a senior management contact and appropriate resources during the full period of the Critical Incident regardless of time of day, either on site or remotely, to assist with data gathering, testing or applying fixes.</p> <p>You are requested to propose a Critical Severity with great care, so that valid Critical Severity Incidents obtain the necessary resource allocation from Enate.</p>
Major	<p>The incident is causing serious inability to access the service and normal operations are significantly affected for some users. Major incidents display one or more of the following characteristics: The incident causes multiple users to be unable to access core functions of the system</p> <ul style="list-style-type: none">▶ The incident causes reversible data corruption.▶ The incident causes impaired functionality or significant performance issues affecting the ability to meet business SLAs▶ The incident meets the criteria for a Critical incident other than there is an interim solution or workaround.▶ Total inability to deliver time critical services to a single End User Customer.
Normal	<p>All incidents not categorised as Critical or Major.</p>

When is the Helpdesk Available?(Ultimate)

The Enate Helpdesk is open from 9am China time on a Monday through to 5pm Pacific Time on a Friday with the exception of 25th December and 1st January. Reference to Working Hours means the hours that the helpdesk is open.

When is the Helpdesk Available? (Essential)

The Enate Helpdesk is available from up to 9am India Standard Time to 5:30pm UK time, Monday to Friday, with the exception of 25th December and 1st January. Reference to Working Hours means the hours that the helpdesk is open.

HOW ARE INCIDENTS CATEGORISED?

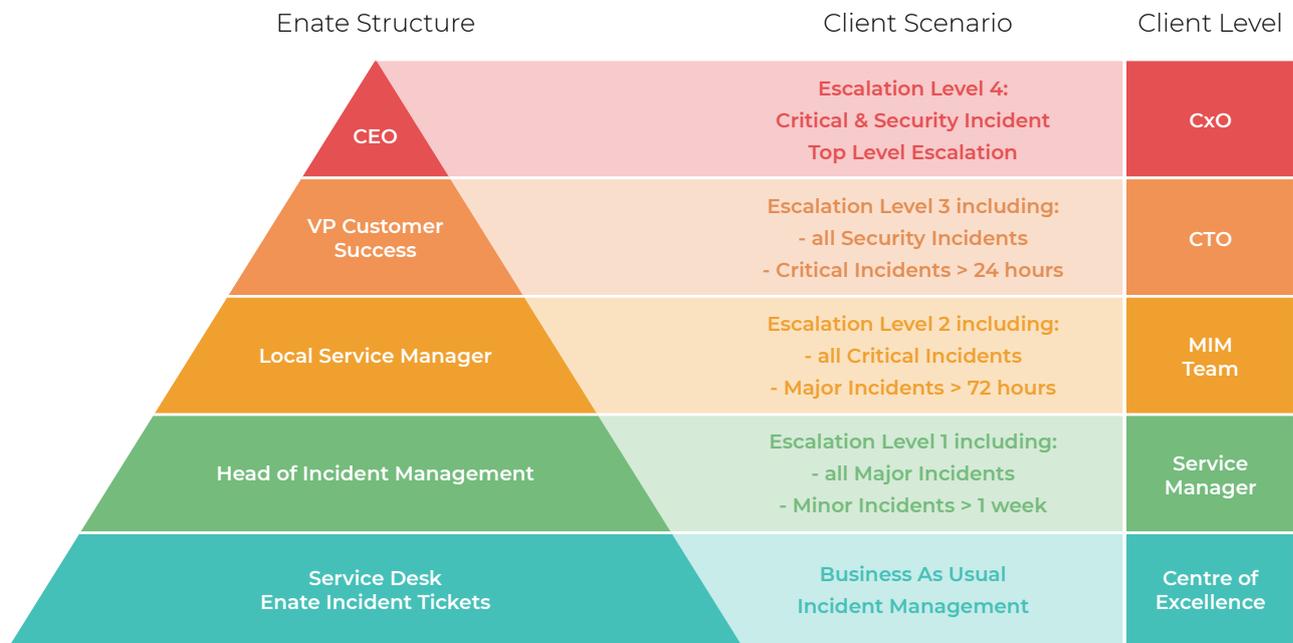
If you believe in good faith that you have not received quality or timely assistance in response to the Incident you have raised, or that you urgently need to communicate important further related information, you may escalate the incident via the Enate Helpdesk.

For incidents that are escalated, the Enate Helpdesk will engage the Enate Head of Incident Management, who is be responsible for managing your escalation and communicating an action plan, including allocating the appropriate Enate resources.

If the Incident continues to remain unresolved, you may contact the allocated Local Service Manager.

To facilitate the resolution of an escalated Incident you must be able to provide contacts within your organisation who are at the same level as that within Enate to which the service request has been escalated. The escalation pyramid below shows the contact matrix for Incident escalation, once the correct reporting procedures have been followed into the Enate Helpdesk.

Customer Success - Escalation Matrix



THE ENATE PLATFORM SERVICE

Delivering the Enate Platform

The Enate Platform is provided as Software as a Service (SaaS) to you, therefore we will:

- ▶ Install Enate and configure and operate Enate in line with good practice in order to meet the availability and performance SLAs agreed
- ▶ Perform all administration on the platform including configuration of plugins and integrations only designed to be deployed by platform administrators. These include but are not limited to User Data Stores, Integration Adapters, installation of the platform plugins, configuration of password policies, configuration of platform level defaults
- ▶ Provide and manage all server-side hardware and operating systems relating to the delivery of Enate including servers and communication equipment within a secure environment.
- ▶ Provide the Platform to meet the Availability KPI set out in the Service Level and Service Credits schedule.

Security of the Enate Platform

The security of the Enate Platform is very important and will always be managed within the scope of our ISO27001 accredited information security management system. We will:

- ▶ Manage the platform in line with our ISO27001 information security management system asset out in documents ISMS 024 –Enate Statement of Applicability and ISMS 025 -Enate Where is My Data and How is it Stored and Protected which will be updated from time to time. This document can be found at

https://s3.eu-west-2.amazonaws.com/enate-documentation-share/ISMS+025+AWS_WMD.pdf

Provide the Enate Platform such that your data is logically separated from any other customer's data.

- ▶ Manage and install changes, new version updates or patches to operating systems, the application or hardware;
- ▶ Provide and manage firewall security and intrusion detection systems to restrict access and block unnecessary ports;
- ▶ Install and maintain anti-malware on all servers.
- ▶ Give reasonable access and support to you as is required to perform regular vulnerability scanning and penetration testing provided that such testing is performed against the internet facing surface of Enate.
- ▶ In the event of a security breach, allow you monitored access to servers in order to conduct forensic imaging of said servers.

UPDATES AND UPGRADES TO ENATE

The Enate Platform is regularly updated to maintain security, compliance and stability with all updates being applied in scheduled downtime. Enate makes two types of changes as follows:

1. Patch Updates

Patch updates only include fixes for Incidents and Problems identified by you and other existing clients. No new features or functionality are ever included. Patches are always cumulative.

Patch Updates are automatically applied out of business hours to ensure you have the most up to date performing version of the current Enate release. Patch updates will be applied to both your Production and UAT environments. One exception to this rule is when it was your organisation who reported the software bug which the Patch Update addresses. In this scenario you will be invited to test the Patch Update in your UAT environment first, to ensure we have satisfactorily resolved the issue reported by you.

2. Version Upgrades

Version Upgrades is the route through which we deliver new features to you the customer and typically occur three to four times a year. Version Upgrades include all Patch Updates along with prioritised features and product enhancements. Version Upgrades may also include mandated changes to address regulation and maintain compliance.

Version Upgrades are mandatory and need to be applied to your Enate system within two months of the official release date. We do however allow you to elect to skip one Version Upgrade per year as we know that sometimes other business priorities can occur which conflict with upgrading at that time.

The process for managing Version Upgrades is as follows:

- ▶ We will notify you of features and functions that are planned in the Version Upgrade in advance of the scheduled release dates. We may also make pre-releases available which you can choose to deploy on a sandbox or Enate Community environment to play with new features, especially if they are features which you have requested and are waiting to test.
- ▶ One month prior to the official Version Upgrade release date we will notify you that the Preview Release is available to be installed on your UAT environment. This allows you a chance to work with the new version in full within the context of your business configuration to check how the new features work for you.
- ▶ We will then notify you of the availability of the official Version Upgrade on the day it becomes available and arrange to apply this to your UAT environment replacing the Preview Release. This will happen within 1 week of the release date.
- ▶ You will then have a three-week period in which to test the Version Upgrade in full to ensure Enate is still working as you expect ahead of agreeing to go live.
- ▶ The Version Upgrade is then applied in a period of mutually agreed scheduled down time within 2 months of the official release date. Version Upgrades typically require no more than 2 hours of downtime.

ENATE LEARNING SERVICES

We want to ensure it is easy for you and your teams to learn about and understand how to use the Enate. Therefore as part of our Customer Success plans we include three services to help you with this. They are:

Enate Academy

Enate Academy is our online learning environment where you can go to learn how to build and work with Enate. Some courses on Enate Academy are taken by single users using an Enate Community environment. Typically these are courses aimed at business analysts and configuration users and are called Individual Courses. Other courses are delivered to a group of users simultaneously, typically these are courses for end users who use Enate day to day to deliver service to customers, these are called Group Courses.

- ▶ Individual Courses are free of charge and can be signed up to online at <http://www.enate.academy>. Individual courses do require all users to have an Enate Community subscription to run them.
- ▶ Group Courses have to be booked in advance and incur a per course booking charge. Each group course can have a maximum of 20 participants (unless otherwise stated). Group courses can be booked through the Enate Helpdesk.

Enate Knowledge Base

The Enate Knowledge Base is the home of official documentation about Enate and can be accessed at <https://forum.enate.community/k/>

Enate Forum

The Enate Forum is available to all Enate customers and can be accessed at <http://forum.enate.community>. The forum is there for you to interact with other users of Enate and members of the Enate team when you have questions about how to use features and solve certain problems.

If you have lots of questions about features and how to solve specific problems, it will be best to work with an Enate implementation partner to work through these.

SERVICE LEVELS AND SERVICE CREDITS—SAMPLE AGREEMENT

- 1 This SLA records certain elements of Supplier's performance of this agreement ("key performance indicators") for which performance will be measured objectively in accordance with this SLA. References to "service credits" mean the service credits in the table of key performance indicators below.
- 2 For each Service, this SLA will take effect in the first full month after the Commencement Date.
- 3 If, in any one measurement period, and in relation to each key performance indicator, Supplier fails to meet the minimum service level targets set out below, Supplier shall pay to Customer the applicable service credits as liquidated damages for such failure.
- 4 Service credits are calculated for each Service separately and as a percentage of the recurring Charges in the measurement period for the Service. Other fees are ignored for service credit calculations.
- 5 Any service credit will be paid by Supplier as a credit to Customer against Supplier's next invoice. If no further invoice is expected Customer may request payment of the service credit as a refund against the last invoice.
- 6 The key performance indicators and their related service levels and service credits set out in this SLA will not apply:
 - ▶ when Customer Data is not provided by Customer on time and in the correct format;
 - ▶ when the CoE is not available to support incident resolution;
 - ▶ when the failure is not caused by Supplier;
 - ▶ during periods of scheduled downtime
- 7 The total service credits for any measurement period will not exceed 10% of Supplier's recurring Charges for that period for the relevant Service. If total service credits would otherwise exceed 10% of the relevant recurring Charges, Customer may opt instead (by notice served within 30 days of the most recent service level failure) to claim actual losses for the failure (subject to clause the Limitation of Liability clause in the terms of business) and paragraph 8 of this SLA will not apply.
- 8 This SLA sets out Supplier's sole liability and remedy for any costs, claims, expenses, or damages whatsoever arising out of or in connection with a failure to meet the service levels in this SLA.
- 9 After a failure to meet a minimum service level, Supplier shall take reasonable steps (at Supplier's cost) to avoid repeated failures to meet the minimum service level.

- 10** In addition to claiming service credits, Customer may terminate the Service (by notice served within 30 days of the most recent service level failure) in either of the following events:
- ▶ failure to meet the minimum service level of the Availability KPI in more than 3 consecutive measurement periods;
 - ▶ failure to meet the minimum service level of the Availability KPI for the same Service on more than 4 occasions in any 12-month period.

11 Definitions:

- ▶ “Response” means the point at which we acknowledge receipt of a reported Incident to say we are working on it. We will also provide you with an Incident ticket number for future reference.
- ▶ “Resolution” means the point at which services relating to the reported Incident have been restored and people are no longer feeling the impact. This could be because we have applied either a permanent fix or an acceptable workaround to the issue reported. It is also possible that a workaround does not completely resolve the issue reported but we both agree that it has reduced the impact on your people to an acceptable level. In this case we will with your agreement downgrade the Incident and continue to work on it in line with its revised severity.

KEY PERFORMANCE INDICATORS(ULTIMATE)

KPI	Service Level Target	Measurement Period	Measurement	Service Credit
Availability	99.5%	Calendar Month	Availability of the Platform during Helpdesk working hours for the Ultimate plan	8%
Response to Critical Incidents	90%	Calendar Month	Critical Incidents responded to within 2 hours.	2%
Resolution of Critical Incidents	90%	Calendar Month	Critical Incidents resolved within 4 hours.	4%
Response to Major Incidents	90%	Calendar Month	Major Incidents responded to within 8 Working Hours.	1%
Resolution of Major Incidents	90%	Calendar Month	Major Incidents resolved within 16 Working Hours.	3%

KPIs are measured in accordance with the procedures set out from time to time in the document How does Enate Measure KPIs?

KEY PERFORMANCE INDICATORS(ESSENTIAL)

KPI	Service Level Target	Measurement Period	Measurement	Service Credit
Availability	99.5%	Calendar Month	Availability of the Platform during Helpdesk working hours for the Ultimate plan	6%
Response to Critical Incidents	90%	Calendar Month	Critical Incidents responded to within 2 hours.	2%
Resolution of Critical Incidents	90%	Calendar Month	Critical Incidents resolved within 4 hours.	3%
Response to Major Incidents	90%	Calendar Month	Major Incidents responded to within 8 Working Hours.	1%
Resolution of Major Incidents	90%	Calendar Month	Major Incidents resolved within 16 Working Hours.	2%

KPIs are measured in accordance with the procedures set out from time to time in the document How does Enate Measure KPIs?

ABOUT ENATE

Enate is a SaaS Process Orchestration platform that manages a workforce of humans and digital workers for simplified end-to-end business processes. With Enate, you can plug and play any technology (RPA, AI, cognitive, NLP, machine learning), from any vendor, to get digital fast. The platform enables the delivery of services from multiple locations to local standards while maintaining complete visibility and control (including the automation of KPIs and SLAs), all aligned to detailed reporting of cost and productivity. Enate's platform deploys within weeks.

Enate was founded by automation industry expert **Kit Cox**. Customers include TMF, CMS, Mizuho, Utmost Group and Capgemini. Enate was named a Hot Vendor 2019 by HFS Research.

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