

# Retain Service Charter

## Summary

Retain's Service Charter outlines the scope of the Support Services we provide, the processes and objectives we have in place and demonstrates our commitment to delivering exceptional customer service.

It forms part of Retain's standard terms and conditions which can be found here: <https://www.retaininternational.com/Terms-and-Conditions>

We always welcome new ideas for enhancing our service. We constantly evaluate ourselves against this Service Charter and strive for continuous improvement. If you have any suggestions for improvement, please do not hesitate to let us know.

## Retain Customer Support

The Retain Support Desk is the first point of contact for all your Support Services queries.

## Support Desk Opening Hours

Standard Support Hours are 09:00 to 17:30 Monday to Friday. Extended Support Hours are 06:00 to 23:00 Monday to Friday (if selected in a Product Order subject to additional charge). These are UK times and exclude UK Public Holidays. 24x7 telephone support is available for Critical Incidents.

## Retain Availability

Retain Cloud's minimum target availability is 99.5% per calendar month excluding scheduled maintenance. Retain endeavours to provide a minimum of 48 hours notice and to carry out scheduled maintenance outside of local business hours.

Maintaining availability of self-hosted Retain products is the responsibility of the customer.

The Retain Service Charter defines our commitment to delivering high-quality services with professionalism, transparency, and a dedication to exceeding expectations and delighting our customers.

## Customer Portal

<https://support.advancedadv.com/csm>

The Retain Customer Portal is our main communication hub which can be accessed 24 hours a day, 7 days a week and 52 weeks a year.

You can log, update and view your cases as well as adding notes and uploading attachments to help us to support you. The portal also provides a searchable Knowledge Base with access to useful Knowledge Articles and FAQs.

We actively encourage our customers to use the portal and support you to do so. Should you experience any issues accessing or using the Retain Customer Portal then please email [portalsupport@advt-group.com](mailto:portalsupport@advt-group.com)

Support desk telephone: **+44 330 122 7200**

## Case and Incident Management

The Retain Case and Incident Management policy ensures that we have an ITIL compliant workflow in place for all support interactions. This best practice ensures that our customers receive a professional, courteous and efficient support experience.

The Customer Portal allows you to raise Incidents, Service Requests and other Retain queries you may have, directly with the Retain Support Team.

The 'Report an Issue' option should be selected for when you are experiencing an issue or problem with the Retain application and require an Incident to be raised and investigated by the Retain Support team.

The 'Create a Request' option should be selected for when you are raising a Service Request for a licence change, advice on an idea, technical consultancy, a request for information or any other enquiry. Should the Retain Support team not be able to assist you, your query will be promptly referred to the appropriate Retain team who can provide the assistance you require.

## Case Triage and Investigation

Once you raise your Incident or Service Request, your case will be allocated a unique case reference number. Cases will be triaged by the Retain Support team who will ensure that all of the information required to investigate your issue has been provided and the correct priority assigned. This constitutes the Response SLA on the case. Should further information be required to investigate your issue, then email updates will be provided to you via the Customer Portal and the case will be placed into an 'On Hold' status until all required information has been supplied.

We adopt a structured and collaborative approach to our investigation of your case and where necessary will engage with the appropriate third tier technical and product specialists to assist with investigation. To expedite diagnosis, we may request remote access to your system to perform troubleshooting. These requests will always be made with your consent and handled in accordance with our security and privacy policies.

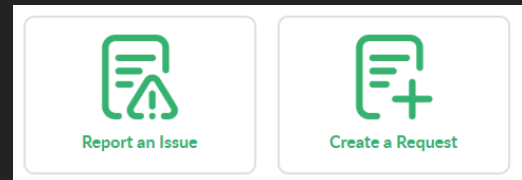
## Case Resolution

Once a solution or viable workaround has been provided to you, then the case is placed into a 'Resolved' status. Resolution notes are provided to you which will include root cause analysis details for Critical and High Priority incidents. This constitutes the Resolution SLA on the case.

You can accept or reject the solution provided on the Customer Portal. Should you reject the solution then the case is re-opened and will be re-assigned to the Retain Support team for further investigation. Should you accept the solution provided then the case is placed into a 'Closed' state and cannot be re-opened. Resolved cases automatically move to a Closed state after 10 working days.

## Who Can Contact Us

All Retain Customers who have an active Retain Support and Maintenance contract can contact the Retain Support team. We set you up with 'Super User' contacts who can in turn manage your organisations' contacts who are able to log, view and update cases on the Customer Portal.



## Before You Contact Us

So that we can correctly prioritise your issue, and to support us with expeditious resolution, please provide us with as much information as possible including the following:

- The product / module affected
- The environment that is impacted, for example, Live or Test
- Full details of the issue including error messages and screenshots
- Is the issue intermittent or can it be replicated?
  - Dates and times if it is intermittent
  - Full steps to recreate if it is replicable
- The number of users impacted – is this affecting all users of the application?

The information you provide will ensure that the business impact of the issue can be ascertained and the correct priority assigned to your case. Should you disagree with the priority assigned, then please add a comment to your case with the business justification so that the priority can be re-assessed by the Retain Support team.

## Data Protection

We request that you do not include Personal Data unless it is necessary for the resolution of your case.

Our Customer Portal platform employs enterprise-grade encryption, strong authentication measures and adheres to internationally recognised security standards to enable data protection and compliance. However, if your file contains sensitive information, please consider the data privacy implications and contact us for an alternative data transfer solution if required.

Furthermore, any files you upload to your case will only be visible to contacts linked with your organisation and AdvT personnel. AdvT approved sub-processors can be found here <https://www.advt-group.com/advt-group-subprocessors>

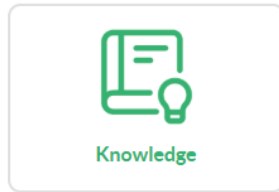
## Problem and Known Error Management

We follow ITIL best practice for problem management to identify and address the root cause of Incidents and prevent their reoccurrence.

Problem Management is initiated when a software bug has been identified or for when the underlying cause of an Incident has not been ascertained during Incident resolution, and further root cause analysis is required.

For confirmed software bugs and defects, a Known Error Knowledge Base article is provided to you which is visible on the Customer Portal. This article is kept up to date with workarounds, root cause analysis findings and release status updates for permanent fixes where required.

We encourage you to subscribe to our Knowledge Base articles to ensure that you receive regular updates. Our goal is to ensure transparency and minimise service disruption through timely communication and shared knowledge.



## Major Incident Management

Whilst most customer issues are resolved through our standard Case and Incident Management processes, we do have dedicated policies and procedures in place to manage Major Incidents and Security Incidents. In the rare event that a Major Incident or Security Incident is reported, these processes enable Incidents to be addressed and resolved in a controlled, timely manner with the focus on minimising the impact to our customers.

A Major Incident is a Critical Incident that is an unplanned disruption to service which causes a serious interruption to business activities usually impacting multiple users.

A Security Incident is defined as an event that may compromise the confidentiality, integrity or availability of Retain or its customers' systems, assets, data or services.

The scope of our processes cover the logging, identification and confirmation of a Major / Security Incident through to successful recovery. The process ensures that communications are in place to keep customers fully informed and to expedite the speed of response and restoration of service to our customers.

Effective Problem Management ensures that root cause is identified and communicated to our customers. A Major Incident Review also identifies any areas of improvement which can be added to the Retain Continual Service Improvement Plan.

## Customer Communications

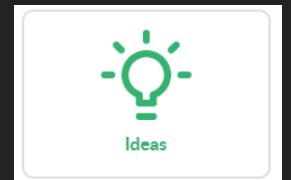
We are committed to keeping you informed, supported, and engaged through timely and relevant communication.

- Portal Announcements: key updates, service changes and important notices are shared directly through our Customer Portal
- Targeted Publications: we also deliver tailored content via email to customer contacts for important updates and changes

Our goal is to ensure clear, timely and purposeful communication that supports your experience.

## Ideas

Ideas and your feedback are the key to innovation. We need a continuous cycle of your ideas, feedback, and requests to keep growing and improving your experience.



Our Customer Portal provides a link to our Ideas Portal and our Product Roadmap which outlines our vision, direction and the progress of our Product Strategy. Our product roadmap is underpinned by your suggestions and feedback so please use our Ideas Portal to help us develop and refine the development of our product goals.

We provide a Knowledge Base article on our Customer Portal which provides guidance on how you can raise, vote and comment on Ideas and we encourage you to do so to ensure that we are meeting your requirements.

## Customer Success Programme

Our Customer Success Programme is designed to help you get the most out of our products and services. Every customer is allocated a Customer Success Agent who is there to help you:





- Reach your goals using our services effectively
- Understand and use the tools available to support your journey
- Solve challenges you may be facing through proactive support and guidance
- Build a strong partnership that evolves with your needs





Your success is our success!



## Incident Management Service Level Agreement (SLA) Targets

This section outlines the target response and resolution times for Incidents, based on their severity and impact. These targets help us to enable timely and effective service restoration.

-  **P1 - Critical** - An event or series of events during which the entire system, or business-critical functionality, is completely inaccessible
-  **P2 – High** - An event or series of events that interrupts business critical functionality or reduces / eliminates access for multiple users
-  **P3 - Moderate** - An event or series of events that makes a non-business critical functionality or procedure unusable or difficult to use, with minor operational impact but no direct impact on critical services. A workaround or alternative may be available
-  **P4 - Low** - A degradation to non-critical functionality. The basic functionality still works but with little or no impact on operations

	 <b>Critical</b>	 <b>High</b>	 <b>Moderate</b>	 <b>Low</b>
Target Response Time	2 hours	4 hours	8 hours	8 hours
Target Resolution Time	8 hours	12 hours	5 days	10 days

SLA times listed refer to Retain’s Support Hours. In the event of a Critical Incident, we encourage you to the call the Retain Support Desk on +44 330 122 7200 to ensure the priority is assigned accordingly.

Target Resolution Time for Critical and High priority incidents is the time taken to restore service or to provide a viable workaround. When required, a permanent fix which eliminates the root cause of the incident will be provided in the next Retain Product hotfix or release. Permanent fixes for lower priority incidents are prioritised based on the impact and urgency of the issue alongside the viability of any workaround in place. Retain Product Release schedules are available on the Customer Portal.

Please note that SLAs only apply for incidents which impact customers production environments. Service Requests and Incidents impacting non-production environments, are supported on a reasonable endeavours basis and are not subject to formal SLA timeframes.





## Feedback

Whether you are happy or unhappy with the service that you have received, please tell us.

Your feedback helps us to identify both good and bad practice and we use it to encourage our team members to provide excellent customer service. We send surveys via the Customer Portal asking you to rate the service you have received for your case and to add comments should you wish.

We also send out regular customer surveys asking for your feedback about our products and the services that we deliver to you. We review survey results on an ongoing basis to continuously improve our products and services that we provide.

## Escalations

We are committed to delivering transparent and high-quality services to all our customers. However, there may be occasions where we are not able to meet your expectations, or you may feel that your issue is not being addressed with the urgency that aligns to the business impact of your issue.

- **Incident Escalation**

The Retain Support team is dedicated to providing high standards of customer service that meet and ideally exceed the SLA targets defined in our Service Charter. Automatic escalation processes are in place to notify the Retain management team should the Incident Target Resolution time SLA be close to breaching. That escalation point will use their experience and influence to ensure that all reasonable efforts are being taken to resolve the Incident. Escalation will continue until the Incident has been resolved and is evidenced on the incident activities.

However, if you are not satisfied with the progress being made towards resolving your Incident, then you are able to escalate formally by contacting the Retain Head of Service. So that we can provide an informed response we ask that you provide the Incident reference number. Should the escalation relate to more general service performance then we ask that you provide Incident reference numbers with the reasons that demonstrate the causes for dissatisfaction.

- **Project Escalation**

The delivery of any project, whether it is a new implementation or a change, will be managed by an experienced Retain Project Manager or Professional Services Consultant. It is their role to ensure that plans are mutually agreed, delivery is coordinated and risks are managed. If a customer is not satisfied with the delivery of a Retain project and the issue cannot be resolved through collaborative working, then you are able to escalate formally by contacting the Retain Head of Professional Services.

- **Account Management Escalation**

Retain Senior Sales Executives are committed to delighting our customers. However, if there are any aspects of the Retain account management service that a customer has concerns about, whether sales or relationship management, then you are able to escalate formally by contacting the Retain Sales Director.

A photograph of a woman wearing a black hijab, looking out of a window. The image is overlaid with a green tint and is part of a banner at the bottom of the page.

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Resource Planning**



## Complaints

Retain believes that our Incident Management processes, supplemented by our Escalation processes, should mean that our customers never feel the need to raise a formal complaint. However, if you have an issue that is of a serious nature that cannot be resolved through the escalation channels then a formal complaint providing full details of the nature of the concern should be sent by email to: [retain.support@adv-t-group.com](mailto:retain.support@adv-t-group.com)

These complaint emails will be provided to the Retain Management team who will assign the complaint to a Complaint Manager. The Complaint Manager will be a senior member of the Retain Management Team who is independent of any of the aspects covered by the complaint itself. Confirmation of receipt of the complaint and details of the Complaint Manager will be provided to the author of the complaint within 1 working day of its receipt.

The Complaint Manager will investigate the complaint and have access to all relevant information held by Retain necessary to complete an unbiased investigation within 15 working days. A final response will be issued to the customer within 20 working days of the complaint having been received that will detail the steps that have been taken to carry out the investigation, the root causes (if any) and the corrective actions that have been planned or already taken place. If for any reason the complaint is rejected following investigation, the final response will detail the reasons behind the decision.

### Contact Information

Mike Sander - [Mike.Sander@adv-t-group.com](mailto:Mike.Sander@adv-t-group.com)  
Chief Operating Officer

Rob Thomas – [Rob.Thomas@adv-t-group.com](mailto:Rob.Thomas@adv-t-group.com)  
Sales Director

Nick Grinfeld – [Nick.Grinfeld@adv-t-group.com](mailto:Nick.Grinfeld@adv-t-group.com)  
Operations Director

Kim Jones – [Kim.Jones@adv-t-group.com](mailto:Kim.Jones@adv-t-group.com)  
Head of Service

Bun Van – [Bun.Van@adv-t-group.com](mailto:Bun.Van@adv-t-group.com)  
Head of Professional Services



## About Retain International

Established in 1992, Retain International is a leading provider of resource planning solutions, with decades of experience serving clients across 65 countries. Our mission is to empower organisations and their talent to optimise resource allocation and perform at their highest potential.

Our approach is driven by a deep understanding of evolving client needs, backed by over 30 years of industry experience implementing solutions for small, medium, and large organisations. Retain's highly customisable software meets the needs of complex resource requirements to help manage over 1.5 million people globally.

Retain International is part of AdvancedAdvT Limited ("AdvT Group").

### Find out more

<https://retaininternational.com>

[retain.support@adv-t-group.com](mailto:retain.support@adv-t-group.com)

<https://www.retaininternational.com/Terms-and-Conditions>

Phone: +44 330 122 7200