

**You've had a proposal, signed a Mutual Non-Disclosure Agreement (MNDA) & a Data Protection Agreement (DPA) or a combined MNDA/DPA Agreement, and we may have undertaken a Proof of Concept (PoC) and are now ready to launch your live customer feedback programme.**

**What happens next?**

## 1 DOCUMENTATION

### Agree Contracts

Feedback Ferret's Business Director will send you a Master Services Agreement (MSA). This usually includes a Statement of Works (SoW) which outlines the work that we will be undertaking and at what cost.

Please engage your legal department as early as possible as we cannot commence any work until this is concluded.

Please return the signed MSA to our Business Director.

### Supplier Set-up

Our Business Director will send you Feedback Ferret's business details for your finance / procurement teams which will contain all relevant information you will need to assist with the vendor set-up process.

If you have specific procurement and vendor set-up procedures or forms that Feedback Ferret needs to complete, please send them to our Business Director as soon as possible.

### Purchase Order

Provided the MSA is concluded, work will commence once we receive your Purchase Order. Please raise and send your Purchase Order and all future financial correspondence to [accounts@feedbackferret.com](mailto:accounts@feedbackferret.com).

The PO should contain the information below. Or, if you do not have a PO process, please provide us with this information:

1. Confirmation of the full invoice entity
2. If the invoice entity is in the EU, please provide your EU VAT number
3. Confirmation of the invoice address
4. General finance contact details (email address and telephone number)
5. Details of your invoice submission process – please provide a general finance email account (rather than a person specific) for submitting invoices or provide access to any online platforms, where applicable
6. The PO should cover a minimum of 3 months operations at a time, but ideally 12 month cycles to minimise administration for both parties. Any Change Requests will constitute a separate PO.

Please note the SoW outlines the fees. Invoices for set-up fees are issued on completion of work and on-going monthly operations fees are invoiced monthly in arrears.

## 2 INITIAL DATA TRANSFER

Feedback Ferret's Business Analyst will make contact with your IT representative to discuss our data transfer protocol:

Your feedback data is sent to us via SFTP. To access the SFTP site, you will need to:

1. Downloaded winscp (<https://winscp.net/eng/download.php>).
2. You will be provided with our host name, a username and a password protected ZIP file containing your key (in .PPK and .PEM format) to access the SFTP site.
3. Once logged in, drag and drop your UTF-8 character set encoded .csv file to the file location 'all\_files'.

The data will be processed and results uploaded to the agreed outputs as per the Statement of Works.

We can agree processes for regular automated file transfer in collaboration with your IT team or other 3<sup>rd</sup> party data providers.

## 3 STAKEHOLDER MEETING

This is probably the most important meeting you will have with Feedback Ferret.

The aim of this meeting is to give Feedback Ferret a deeper understanding of your organisational structure and the expectations of your stakeholders. This enables us to build text analytics topics that are fully aligned to your business goals and reporting outputs that suit the needs of all areas of your business.

Experience has shown that engaging all key stakeholders in this meeting is the best way to ensure your feedback programme is a success. Please invite along all relevant departments (e.g. Customer Service, Marketing, Sales, Quality, Finance).

Feedback Ferret's Sales Manager will liaise with you to schedule the meeting, provide an agenda and lead the discussion.

Ideally this meeting would be face-to-face at a location of your choice and typically lasts 2 hours.

## 4 CLIENT SUPPORT

As a general rule, we would expect the set-up time for the roll-out period to be 3-4 weeks but this is dependent on the level of changes that may be required from the PoC phase.

Feedback Ferret uses 'Agile Project Management' to drive our technical development work. This management process advocates adaptive planning, evolutionary development, early delivery, and continuous improvement, and it encourages rapid and flexible response to change.

Our Client Services Team initiates and organises workshops for all those involved to ensure a sound understanding of the information available through the reporting tools.

From the outset, our Client Services Team ensures you are kept informed about best practices, will advise you on how to generate the best quality feedback and will proactively share valuable insights that we uncover from your feedback. We regularly highlight areas of your business that you need to improve to really make a positive impact on customer experience.

**We look forward to working with you!**