

Arbor Finance

Customer Experience

Charter

What to expect when engaging with us

Version history



Our commitment

At Arbor Finance we strive to deliver an outstanding customer experience through every interaction we have with you. Whichever way you choose to engage with us, our commitment is to ensure that you have a consistent high quality experience.

We do this by keeping pace with the changing way in which schools need support and through investing in the latest support technology. This document outlines how we deliver our customer experience and what you can expect when you engage with us.

Contacting us and leaving feedback

The table below explains the different ways customers can contact us:

Area	Channel	Business hours	How to use	Partner schools
Support	Arbor Finance Help Centre	24/7/365	Customers can access guides on how to use Arbor Finance whenever they need to on our Help Centre. We keep the Help Centre up to date with all of our latest releases	Customers can access guides on how to use Arbor Finance whenever they need to on our Help Centre. We keep the Help Centre up to date with all of our latest releases
Support	Online support	Mon-Fri 8am-5pm*	A support ticket can be raised online. Customers will complete a form which includes relevant information on their query, allowing us to provide support quickly.	You will need to contact your partner support line.
Support	Phone support	Mon-Fri 8am-5pm*	Customers can contact us by phone on 0207 097 1684	You will need to contact your partner support line.

Support	Status page	24/7/365	Our status page provides you with a real-time view of the Finance Platform availability including details of any maintenance. It's useful to subscribe to this page as you will then be proactively notified of updates regarding the Finance Platform status via email	Our status page provides you with a real-time view of the Finance Platform availability including details of any maintenance. It's useful to subscribe to this page as you will then be proactively notified of updates regarding the Finance Platform status via email
Customer Sales	customersales@arbor-education.com	Mon-Fri 8am-5pm*	customersales@arbor-education.com Email the above address for queries about your contract and subscription, purchasing additional modules, upgrading your Arbor package or investing in training	customersales@arbor-education.com Email the above address for queries about your contract and subscription, purchasing additional modules, upgrading your Arbor package or investing in training
Training	training@arbor-education.com	Mon-Fri 8.30am-5pm	Log into the Training Hub here https://arboreducation.northpass.com/learners/sign_in Please contact the Customer Education Team on training@arbor-education.com if you need help to sign up to the Training Hub	
Product roadmap	Public roadmap	24/7/365	Our public-facing roadmap enables you to view and leave feedback on the areas where we are developing our Finance platform	Our public-facing roadmap enables you to view and leave feedback on the areas where we are developing our Finance platform

Business hours are 08:30 - 17:00 Monday to Friday excluding bank holidays. Note we may also reduce business hours during school holiday and internal training days. Customers will be notified in advance.

Key Performance Indicators (KPIs)

The table below outlines our target response and resolution times for when our users contact Arbor Support. All interactions with support are logged on Zendesk, our ticketing system, and are fully reportable. Support interactions are categorised by type and impact, and we follow the ITIL framework. Categories are:

Incident: A material defect, fault or impairment in the product, an unplanned interruption to service or reduction in quality of service.

Service Request: A request from a user for information, or advice and guidance

Incidents are assigned a priority based on impact as outlined in the table below with target response and resolution times:

Incident Type	Description	Response Time (Working Hours)	Target Service Level	Resolution time (Working Hours)	Target Service Level
Urgent	Complete system failure. System wide inability to perform any key activities, i.e. access the system or enter any data	1hr	95%	2hrs	90%
High	A key system is not functioning, causing high impact to the operating system. There is no work around or manual process	4hrs	95%	1 working day	90%
Normal	An issue that impacts non critical activities but is time critical. The issue can be resolved by a workaround or manual process.	8hrs	90%	10 working days	80%
Low	An issue that has low impact and has a suitable workaround available. It is not time critical	8hrs	N/A	Low incidents will not be prioritised for individual resolution but will flow into our problem management process	N/A

All **service requests** are assigned the same level of priority and will be managed using the following target response and resolution times.

Incident Type	Description	Response Time (Working Hours)	Target Service Level	Resolution time (Working Hours)	Target Service Level
Service Requests or questions	System usage assistance is required on general queries that are not a consequence of system failures	24hrs	90%	10 working days	80%

We operate support on a best endeavours process. In some circumstances where the query is related to bursar skills and knowledge we will spend 30 minutes assessing the query with our team then advise you if we are able to help or suggest that you contact a specialist accountancy team at the authority or elsewhere.

Major Incidents

In rare instances, urgent incidents (for example whole platform outages) warrant additional customer communications and follow-up. These are called major incidents.

Arbor take the following actions in the event of a major incident:

- We aim to send regular customer updates in line with the Urgent Incident Target SLA of 1 hour. Updates will be sent via email or in the Arbor Finance application
- We aim to update our status page at regular intervals in line with Urgent Incident Target SLA of 1 hour
- Once the incident is closed (resolved) we aim to have a publicly available Post Incident Report (PIR) within five working days. The report covers a timeline, root cause and corrective action plan

Escalation

We will always endeavour to resolve your concerns as soon as they arise. If this hasn't been possible and you wish to escalate your concerns, the below escalation path is available. We require 48 hours to be able to effectively investigate and respond before the next level of escalation in each case.

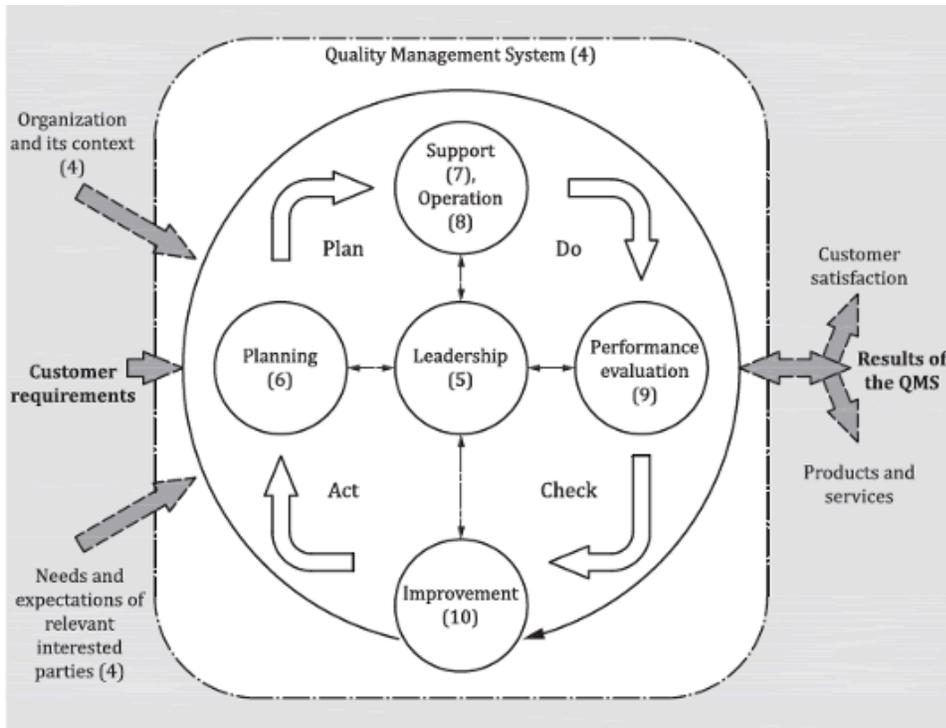
- **Stage 1:** Team Leader
- **Stage 2:** Head of Department
- **Stage 3:** Chief Customer Officer

[Please click here for full details on our Complaints Policy](#)

Continuous Improvement

Continuing to develop our customer experience is important to us and, as such, we adopt a quality approach to a continuous improvement lifecycle. We are also ISO9001 Quality Management Standard accredited.

The operating cycle is explained in the diagram below:



Outputs of our continuous improvement lifecycle include regular reviews of **customer satisfaction data** . We ask for customer feedback when customers interact with us at the following points:

- Support interactions
- Post-customer training
- Post-onboarding
- Customer Satisfaction Score(once per term)

All customer satisfaction survey data is reviewed and fed into improvements to both our processes and our product roadmap review cycle.

Root cause analysis is a process which enables us to continuously improve. Support data is reviewed on a weekly and monthly basis with a view to identify trends and opportunities to remove the underlying cause of multiple incidents/support tickets. This process is called Problem Management. Problem tickets are raised either when the root cause of an incident is known or unknown. Problem tickets are prioritised by the support team according to impact and urgency and tickets are added into engineering sprints for deployment at regular intervals.

What our support covers

Functional use of the product	
Technical Issues arising with the use of the product	
How to issues - via our Help centre	
Year End enquiries	
Software not working as expected	
Bursar service (if you need this please talk to your partner or a company that provides this)	