

## SERVICE ENTITLEMENTS: SAAS INTELLIGENCE

Last Updated: 16 June 2026

This document sets out the Expert Engagement services included in a Vertice SaaS Intelligence subscription, the deliverable for each type, and the Customer's annual allowances.

### A. Expert Engagements

Expert Engagements are included per year as specified in the Order Form. Engagements must be drawn from the menu below. Allowances reset on the anniversary of the Subscription Start Date as defined in the Order Form. Unused allowances do not roll over.

Vertice acts as a strategic advisor rather than an end-to-end project manager. Vertice provides the templates, expert guidance, and overall framework; however, the Customer is responsible for driving internal execution.

Engagement Type	What is included	Deliverable	Annual Allowance
<b>Benchmarking</b>	Assessment of one or more contracts against Vertice's pricing database. Includes pricing comparison, commentary on deal structure, and negotiation recommendations.	Written report delivered via the Vertice platform.	Unlimited <sup>1</sup>
<b>Vendor Recommendation Report</b>	Expert-led assessment of leading vendors in a defined category. Covers capabilities, market position, and commercial parameters. Produces a shortlist with side-by-side comparison.	Written report including: vendor longlist and scored shortlist, side-by-side capability comparison, and Vertice's recommended selection rationale. Delivered via the Vertice platform.	2
<b>Peer Group Analysis</b>	Comparison of the Customer's SaaS portfolio and spend against industry peers, with commentary on gaps, benchmarks, and opportunity areas.	Written report including: spend benchmarks by category, peer portfolio comparison, and identified gaps or optimisation opportunities. Findings presented on a single call.	2
<b>Consolidation or Replacement Analysis</b>	Review of the Customer's SaaS stack to identify duplicated functionality or replacement opportunities. Includes a prioritised recommendation for rationalisation.	Written report including: identified overlaps across the stack, prioritised consolidation or replacement recommendations, and estimated cost impact where data permits.	1
<b>RFI</b>	Vertice engages up to five vendors on the Customer's behalf to gather commercial and technical information. The Customer must define requirements prior to commencement; no commercial negotiations are included.	RFI document for Customer review and issue, plus a written response summary covering: vendor responses, key differentiators, and a recommended next step.	2
<b>RFQ</b>	Expert guidance to help the Customer plan and scope a priced bid event with up to five vendors. Covers requirements definition, vendor longlist recommendations, and evaluation criteria. Vertice does not contact vendors or run the process on the Customer's behalf. No commercial negotiations are included. The Customer is responsible for confirming the final vendor list prior to commencement.	RFQ template and scoping summary for Customer adaptation and issue, covering: recommended requirements structure, suggested vendor longlist, and evaluation criteria.	2
<b>RFP</b>	Expert guidance to help the Customer plan and scope a sourcing process with up to five vendors. Covers problem statement definition, vendor longlist recommendations, and evaluation framework design. Vertice does not contact vendors or run the process on the Customer's behalf. No commercial negotiations are included. The Customer is responsible for confirming the final vendor list prior to commencement.	RFP template and scoping summary for Customer adaptation and issue, covering: recommended requirements structure, suggested vendor longlist, and evaluation framework.	1
<b>Procurement Maturity Assessment</b>	Assessment of the Customer's procurement processes against best practice, using information gathered during onboarding.	Written maturity report including: scored assessment across policy, technology, contracting, supplier management, and budget planning, plus a prioritised set of improvement recommendations.	1
<b>Budgetary Planning and Analysis</b>	Expert support during the annual budget cycle, using Vertice data to improve forecast accuracy for in-scope SaaS spend. Includes renewal risk identification and cost reduction target-setting.	Written analysis including: forecast for in-scope SaaS spend, renewal risk flagging, and recommended cost reduction targets.	1

<sup>1</sup> Unlimited benchmarking applies only to contracts already present on the Vertice platform as part of the Customer's Estimated Supported Spend. Benchmarking of contracts outside this scope is not included.

## **B. What Constitutes One Expert Engagement**

An Expert Engagement is a discrete piece of advisory work tied to a single defined outcome. One revision request is included within the original engagement provided it relates to the same scope. A revision request is limited to refinements or corrections to the original deliverable and does not include changes to the vendor list, evaluation criteria, or requirements. A material scope change after delivery counts as a new engagement.

<b>Status</b>	<b>Definition</b>
<b>Opened</b>	When scope has been agreed in writing between the Customer and Vertice. This may be via email, via the Vertice platform, or by a written scoping summary confirmed by both parties. For RFI, RFQ, and RFP engagements, the Customer's written requirements submission (per Section C.2.1) must be received before scope can be agreed and an engagement opened.
<b>In progress</b>	All calls, iterations, and correspondence required to produce the deliverable count as part of one Expert Engagement, provided they relate to the defined scope agreed at opening.
<b>Closed</b>	When the agreed deliverable has been produced and delivered to the Customer, or when the Customer confirms in writing that the Expert Engagement is no longer required.
<b>Not consumed</b>	Scoping conversations prior to written agreement of scope do not consume an engagement. A request withdrawn before a deliverable is produced will not be counted.

## **C. Scope and Limitations**

### **1. Nature of Services**

1.1. All Expert Engagement services are advisory in nature. Vertice does not manage ongoing vendor communications on the Customer's behalf, administer procurement platforms, or act as the Customer's agent for contract signature. For RFI engagements, Vertice engages vendors directly for the purpose of information-gathering only; this does not constitute ongoing vendor management or agency.

1.2. Services apply only to SaaS spend categories within the Customer's Estimated Supported Spend as defined in the Order Form.

### **2. Customer Obligations**

2.1. For RFI, RFQ, and RFP engagements, the Customer is responsible for defining requirements, problem statements, and use cases prior to commencement. Vertice will not open an engagement until this is complete.

2.2. The Customer shall provide timely feedback and decisions to enable Vertice to deliver each request within a reasonable timeframe.

### **3. Vendor Cap**

3.1. All sourcing engagements (RFI, RFQ, RFP) are capped at five vendors unless otherwise agreed in writing prior to commencement.

### **4. Additional Expert Engagements**

4.1. Engagements beyond the allowance specified in the Order Form may be purchased at the then-current rate. The Customer should contact their Vertice Account Manager to discuss.