

Savills HK + MRI Software Deep-Dive Workshops

25-27 August, 2025



Deep Dive Session 1

Monday 25th August



Session 1 Agenda – Mon 25th August

1. Introductions / Outcomes for this week (10 mins) - Brett / James
2. Agora Insights + Reporting (40 mins) - Mark
3. Implementation + Support Model (60 mins) - Marcus / Maria / Brett
4. PMX On-The-Go App & Contract Intelligence (10 mins) - Mark
5. Commercials / Strategic Best Practices (20 mins) - Brett / James



Your Trusted Partners



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Outcomes for 25-27 August

1. Proven Team + Track Record

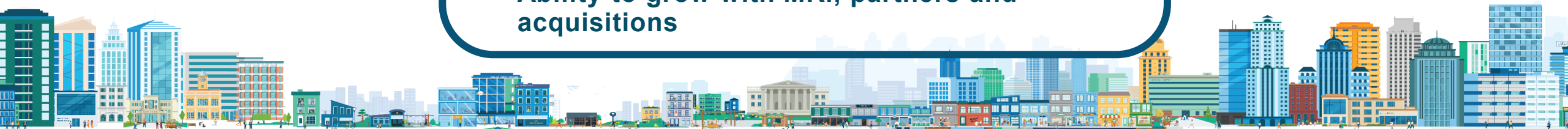
- Expertise in delivering and supporting solutions to similar businesses in HK
- End-to-end solution
- Provable ROI

2. Risk Mitigation

- Trusted global Savills | MRI relationship
- Advanced auditing & security
- Industry standard compliance (SOC, ISO)

3. Future Proofing

- Significant Investment in AI & Data
- Scalable, Reliable Technology (54+ years)
- Ability to grow with MRI, partners and acquisitions



Reporting & Dashboard

1. Show case of standard reporting template, what is included in the 600 templates?
2. Match MRI reports with Savills existing reports
3. How can we do configure on the customize ad-hoc reports, demo on the tools
4. How is it integrating with Power BI?
5. How can we set up access rights and data governance
6. Control on Financial Statement issued status (e.g. Consolidated report showing the last IE issue for each property)
7. Mark the reason for the fluctuation as compared to last month (variance analysis)



Agora Insights + PMX Reporting Overview



Implementation and Support

1. **Implementation Approach:** A detailed walkthrough of your proposed project timeline, phases, methodology, and key milestones.
2. **Data Migration:** A deep dive into your data migration strategy, required data formats, validation tools, and the expected effort from the Savills team.
3. **Backend & Governance:** An explanation of the backend configuration environment, administrative controls, and system governance features
4. **Support Model:** A review of your post-go-live support structure, including team location, hours of operation, and specific SLAs for the Hong Kong region.



Implementation Overview



MRI 4D Framework



DEFINE

DESIGN

DEVELOP

DEPLOY

UNIFIED IMPLEMENTATION FRAMEWORK

Stage Gate Sign Off

Key Stakeholders from both MRI and Client Project Teams

- Stage Gates are a way to ensure that your project delivers what it should and in a proper manner. Stakeholders review progress that has been made and upcoming actions, jointly signing off UAT
- There are some elements that may require sign off before/after the UAT Stage Gate, for example:
 - Define
 - Design
 - Closing a project
- In these circumstances a Project Acceptance Certificate is used to obtain sign-off



Project Scope/Deliverables

Define

- Project set-up
- High level project plan
- Project Kick-off meeting
- Agree meeting/reporting cadence
- Install and Configuration of PMX

Design

- Project Plan
- Resourcing
- Communication Plan
- Custom COA discussion
- Data migration & Hierarchy discussion
- Workshop

Develop

- Install and Configuration
- Data Migration
- Customisations
- Training
- Cutover planning

Deploy

- Go Live on PMX, Simplicity



Change Control Process



Capture

- Log Potential Change
- Provide Severity/Priority



Estimate

- Impact Assessment
- Create PCR Documentation



Decide

- Escalate if above delegated authority
- Approve, Reject or Negotiate PCR



Design

- Confirm Scope/Spec
- Update PCR (if required)
- Reconfirm Impact
- Reconfirm Severity/Priority
- Update Project Plan



Build

- Implement the change
- Client Acceptance of the change

1

2

3

4

5

System Admin

- System Admin must be nominated.
- Only MRI can grant System Admin rights.
- Security Console
 - User Groups – different user rights
 - Entity Class access
 - System Audit report
 - Authorise backup/restore of db

Roles and Responsibilities



Project Sponsor

- ▶ Ensures that business requirements are aligned with corporate strategies and initiatives, are clearly communicated, and are achieved.
- ▶ Markets the project to internal and external customers to ensure satisfaction, successful implementation, and acceptance.
- ▶ Approves significant project deliverables.
- ▶ Removes obstacles and barriers within the business unit that may impede successful execution and implementation.

Executive Sponsor

- ▶ Evaluates satisfaction with the services being provided.
- ▶ Perform the necessary actions to alleviate problem areas by communicating with the Project Managers.
- ▶ Approves the time frames, milestones and project plans.
Approves change requests
- ▶ Removes obstacles and barriers within the business unit that may impede successful execution and implementation.
- ▶ Ensures that appropriate resources are available.

Project Director

- ▶ Controls the business aspects of the project. Is accountable for ensuring that the realized benefits are achieved.
- ▶ Approves significant project deliverables.
- ▶ Removes obstacles and barriers within the business unit that may impede successful execution and implementation.
- ▶ Prioritize and allocates project funding within the project. Tracks all project expenditures.

Project Manager

- ▶ Serve as primary coordinators for the project and teams within the project
- ▶ Develop and maintain the project plan
- ▶ Ensure issues are resolved in a timely manner
- ▶ Present project status, issues and concerns, and resource needs to the Project Director

Super Users

- ▶ Module Leader
- ▶ Attend Immersion training
- ▶ Participate in Solution Design Workshop
- ▶ Make key decisions on module setup and workflow
- ▶ Provide direction for Test Scripts development
- ▶ Ensure issues are resolved
- ▶ Present project status, issues and concerns, and resource needs to Project Managers

Key Users

- ▶ Attend Immersion training
- ▶ Participate in Solution Design Workshop
- ▶ Prepare Data Import using Template
- ▶ Verify Migrated Data
- ▶ Attend Key User Training
- ▶ Develop Test Scripts
- ▶ Perform User Acceptance Testing (UAT)
- ▶ Identify & report issues to Module Leader

MRI System Administrator

- ▶ Attend Overview/Superusers training
- ▶ Maintenance of MRI Global Master File Settings
- ▶ Creation and Maintenance of Users security profiler

Key Success Factors



Key Success Factors

- ▶ Strong Management Support and Commitment
- ▶ Shared Vision
- ▶ Ownership with Clear Roles and Responsibilities
- ▶ Value-Driven
- ▶ Open Mindset and Multi-Level Communications
 - ◎ Steering Committee
 - ◎ Project Team
- ▶ Timely Decision

Project Planning



Guiding Principles

- ▶ **Roles and Responsibilities** - Timely Decision, Verification and Validation
- ▶ **Land and Expand** - Showcase Properties (Mix of Representative Properties) & Roll-Out in phases
- ▶ **Data Migration** - Template-based and Data Quality Assurance, Data Import Process and Utility, Verification and Progress Tracking
- ▶ **Train-for-Trainers** - Operation Manual - Ownership and Continuity
- ▶ **Project Management** - Action Plan, Accountability and Transparency, Risk Mitigation

Data Setup and Migration

- ▶ **Master Code** – Setup and Mapping
- ▶ **Master Data** – Validation : Data Type/Length Validation, Primary Key Validation, Referential/Foreign Key Validation, Semantic/Logic Validation
- ▶ **Transaction Data** – Outstanding Charges/Credits/Prepayments, Deposits, Outstanding AP Invoices
- ▶ **Verification and Sign-off** – TB, Aging Report, Deposit Analysis Report, Outstanding AP Invoices Report
- ▶ **Hypercare Support** – First Month Activities and Catch-Up

Key Activities



Key Activities

- ▶ Kick-Off
- ▶ Immersion Training
- ▶ Solution Design Workshop
- ▶ Key User Training
- ▶ Trial run / User Acceptance Testing
- ▶ General User Training
- ▶ System Go-LIVE
- ▶ Roll-Out in phases

Project Management

- ▶ Scope, Resource, Time and Quality
- ▶ Ownership & Communication
- ▶ Issue Log, Tracking and Management
- ▶ Change Management
- ▶ Progress Reporting
- ▶ Progress Meeting

High Level Project Schedule



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Commitments



MRI Commitment

- ▶ Product Functionality
- ▶ Product Knowledge
- ▶ Best Practice
- ▶ Creative Usage of Technology
- ▶ Project Management

Client Commitment

- ▶ Business Knowledge
- ▶ Time & Resource
- ▶ Timely Decision Making
- ▶ Management Support
- ▶ Ownership of the Solution

Support Team Overview



Savills HK Account Team



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+ Over 300 Product, Delivery and Support Team Members Across APAC

Support Model

- Savills Hong Kong will be supported through the project by our Professional Services team, including a Hypercare period before go-live
- Post go-live, Savills Hong Kong will be transitioned to our APAC Support Team
- Local support agents available 630am – 530pm HKT
- Global support agents available around the clock
- First response time targets – Critical (1 Hour) / Serious (3 Hours) / Normal (6 Hours)



PMX On-The-Go App & MRI Contract Intelligence Overview



Commercial and Best Practices

1. **Pricing Model:** A detailed explanation of the proposed pricing model, including all user-based costs, transaction fees, and potential costs for add-on modules.
2. **Strategic Best Practices:** A discussion of the key customisations and best practices from other Savills instances (UK/AUS) that could benefit our operation.



Pricing Considerations

- Potential to significantly reduce Customisation costs if Savills resources can perform some of these tasks in-house
- If Savills considers a residency, this in-house resource could also reduce delivery costs –
- What is Savills' preference around CapEx v OpEx for licensing costs?
- Certain modules could be delivered as Phase 2 / Phase 3 – reducing upfront implementation costs

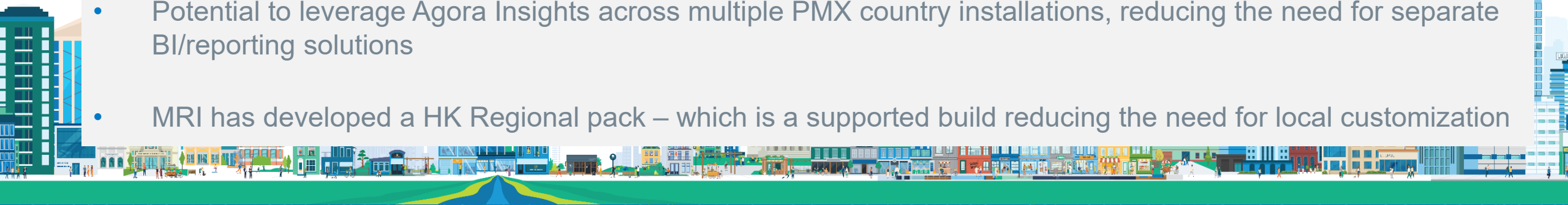


Pricing Model - Licensing

Solution	Inclusions
Property Management X	<ul style="list-style-type: none">• Property Management Suite• Financial Suite• Reporting Suite• Toolkit Suite• 120 Concurrent User licenses• Unlimited User accounts
Simplicity	<ul style="list-style-type: none">• Supply Chain Management Suite• Finance Management Suite• Vendor Portal• 50 User accounts
eConnect	<ul style="list-style-type: none">• Communication Suite
Agora Insights	<ul style="list-style-type: none">• Standard Business Intelligence Dashboards• Data Lake• 1 x Power BI Desktop License (Self-Service)• Unlimited Users
Cloud Hosting + Helpdesk Support	<ul style="list-style-type: none">• 1 x Production Database• 2 x Non-production Databases• VPN + SFTP• Unlimited 24/7 support• MRI-managed version control• MRI-managed backups, disaster recovery, patching

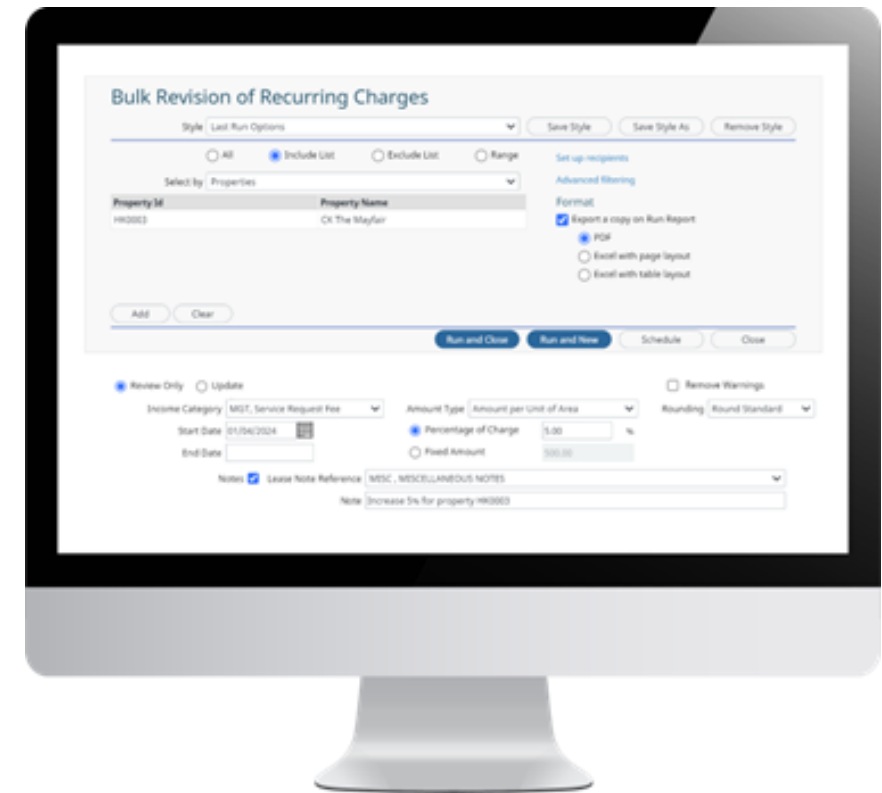
Strategic Best Practices

- iRealz/MRI have delivered many successful projects in Hong Kong for similar clients – throughout Solution Design and Delivery, we will make recommendations as to best practice / uses of the system
- Savills currently leverages MRI solutions heavily in United Kingdom and Australia – there is a large volume of knowledge across Savills globally around best-practice and system capabilities
- Savills Australia has a highly capable resource – Chris Shaw – who has implemented and built many of the Savills global PMX installations, workflows and integrations – with MRI training the local Savills HK team – you will be empowered to customize the system internally as required with **Cost Control**
- MRI's Executive Sponsors for this project - Regional APAC MD – David Bowie, and Regional Asia MD – Alex Lau – are committed to Savills HK's success. This is a high-profile project for MRI that our Global CEO will be continually briefed on.
- MRI is a globally-certified and audited vendor, meeting Savills' global IT requirements
- Potential to leverage Agora Insights across multiple PMX country installations, reducing the need for separate BI/reporting solutions
- MRI has developed a HK Regional pack – which is a supported build reducing the need for local customization



Hong Kong Regional Pack

- Amount by Unit Rate of Area
- Bulk Revision of Recurring Charges
- Hong Kong Rates and Government Rent Assessment Charges
- Charges by Daily Rate Billing



Deep Dive Session 2

Tuesday 26th August



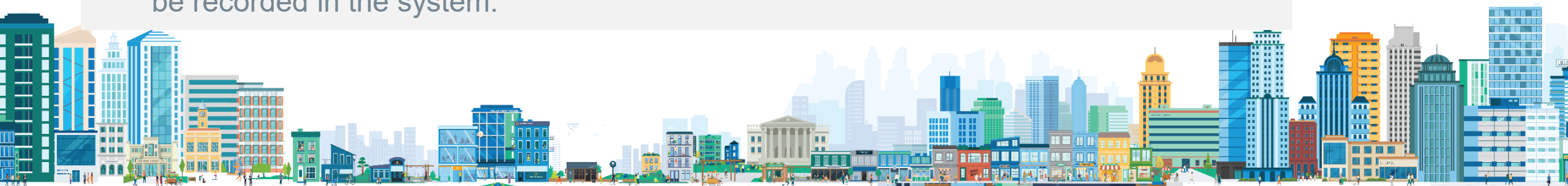
Session 2 Agenda – Tue 26th August

1. Procurement & Vendor Management (120 mins) - Desmond / Jiesen



Procurement Workflow & Controls

1. **End-to-End Lifecycle:** Demonstrate the complete flow from Purchase Requisition (PR) to payment matching.
2. **One-to-Many PR-to-PO:** Show a single PR generating multiple POs to different vendors.
3. **Warranty (DLP) Tracking:** Demonstrate how the system tracks warranty periods and can alert or prevent duplicate PRs for services already covered.
4. **PR/PO Splitting Controls:** Explain and show the system controls to detect and prevent the splitting of large purchases to circumvent approval thresholds. Any best practice on how to prevent this kind of contract splitting issue.
5. **Offline Tender Process:** Show how results from a paper tender or "drawing lots" can be recorded in the system.



Procurement Workflow & Controls (cont'd)

1. How to do the quotation and tendering process
2. **Unit Rate / Blanket Contracts:** Demonstrate how a master contract with pre-agreed rates is managed, and how individual sites can create release orders against it with correct cost allocation.
3. **AP Liability on GRN:** Show how the system can be configured to generate the AP accrual upon Goods Receipt, rather than waiting for an invoice.
4. **GRNI Reporting:** Show the "Goods Received Not Invoiced" accrual report.



Vendor Management & Evaluation

1. **Performance Evaluation:** Demonstrate the workflow for conducting a vendor evaluation (both ad-hoc after a delivery and scheduled annually).
2. **Vendor Hierarchy:** Show how parent-subsidary relationships between vendors can be managed.
3. **Compliance Tracking:** Demonstrate tracking of vendor licenses with automated expiry reminders.
4. **AI-driven Vendor Selection & Validation:** Show any AI-based capabilities for suggesting vendors or validating their information.



Deep Dive Session 3

Wednesday 27th August



Session 3 Agenda – Wed 27th August

1. Advanced Financials (90 mins) - Mark
2. Requirement Check List (30 mins) - Mark / Marcus / Maria
3. Holdover Items / Any Other Business (30 mins) - TBC



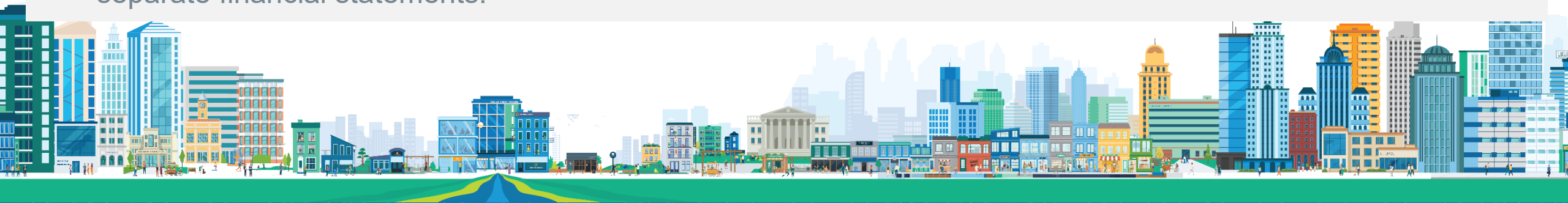
Property Management

1. **Mass Data Upload:** Demonstrate the process for a mass upload of new property data via an Excel spreadsheet when taking up a new property.
2. **On-site Receipts (Sundry):** Demonstrate the workflow for issuing an on-site receipt for a miscellaneous fee where no invoice exists.
3. **How to prepare a building management budget with historical finance data?** E.g. all the management fees, mise income, and expenses should be included in the report.
4. **How to set up the property with different cost centers,** e.g. residential, car park, common. When generating the report or budget, it can be based on different cost centers. E.g. analysis per cost center.



Lease/Tenant Management and Others

1. **Late Payment Interest:** Demonstrate how to configure a variable interest rate (e.g., Prime Rate + 2%) and apply different rules (simple vs. compound) to different properties
2. **Rental Concessions Workflow:** Show the end-to-end process for applying a rental concession, including how to input, the internal approval workflow and how it is reflected on the billing.
3. **Rate Concessions:** a quarterly and monthly basis (i.e. if rates are charged monthly for some properties, the total quarterly concession should be divided by 3 and apportioned to each month)? I want to have separated items in the billing to indicate there is a rate concession (-ve in the billing)
4. **Turnover Rent:** Demonstrate the process for tenant portal or bulk-uploading tenant sales data and the automated reminder function.
5. **Revenue Splitting:** Show how rental income can be split by percentage between multiple shareholders with separate financial statements.



Lease/ Tenant Management and Others (cont'd)

1. **Complex Rent Formulas:** Demonstrate the configuration and calculation of "Effective Rent"
2. **Holdover Tenancies:** Show the process for managing a holdover lease and accounting for mesne profit.
3. **Pre-payment/ Deposit Refunds:** Show the end-to-end process for refunding a deposit. for a new lease if it commences in the middle of the month. For example, will it automatically be applied as partial payment for the following month's rent or does settlement have to be made manually once the invoice is created?
4. ~~**Batch Invoicing:** Show the process of creating variable batch invoices where amounts differ each month.~~
5. **Asset Valuation Metrics:** Show where key metrics (valuation, yield, cap rate) are stored and tracked.



Requirements Check List – High Priority with N / Partial and No Remarks

87	04. Billing & Invoice	The PMS system should validate the completeness of QR code, barcode, cut-off date, email, etc. during the invoice generation process. Besides, PMS should have billing reconciliation.
89	04. Billing & Invoice	The PMS should include configurations to set the invoice status as 'Error' if any error exists during the debit note generation process.
109	04. Billing & Invoice	The PMS should allow multiple selections on bank settlement user list, and support an input/create date column and an additional section to show all the void receipts transactions with their voided reasons.
134	05. Credit Control	The PMS default standard date should be: day of the month for 1st reminder (0-Y days), 2nd reminder (over Y days) where the date is subject to change due to PH. The PMS should also allow bulk change of above standard dates.
114	06. Collection	The PMS should enable input adjustments for allocation based on client requests and provide options to print either an advance receipt for the client or an internal-use-only document.
121	06. Collection	The PMS should allow users to upload bank-in slips as supporting documentation for FIN processing.
158	08. Vendor Profile	The PMS's vendor management module should include an embedded vendor bank account verification process.
261	11. Payment	The PMS should allow authorised vendor invoice matching should enable the issuance and consolidation of fund transfer instructions to the bank, facilitate searching across multiple properties, and include an Excel payment bulk upload function.

Requirements Check List – High Priority with N / Partial and No Remarks

119	12. Reporting and dashboarding	The PMS should generate bank settlement report with voucher number.
364	20. Technical Requirement	The PMS shall provide job status summary report for IT operator to check the job status of the batch process (Provide screenshot or system generated reports. Please provide the information in separate file with filename using the item number.)
365	20. Technical Requirement	<p>In case of error job in a set of batch jobs, The PMS shall allow configuration of allow or by-pass errors for each job</p> <p>a. On regular day-end process, tasks are allowed errors and solution can be given on the next working day</p> <p>b. On month-end day, all subsequence tasks shall be suspended if one of the tasks encounters error. The error task shall be immediately resolved or manually by-pass (if task is not critical)</p>
366	20. Technical Requirement	The batch job shall be called by external system and able to return job status to the source system (Provide screenshot on returning job status code. If job status code contains error message meaning, please specify. Please provide the information in separate file with filename using the item number.)
367	20. Technical Requirement	<p>For the batch of period end instructions, user may set job execute mode:</p> <p>a. One by one - Job must be complete before another start</p> <p>b. Concurrent - Jobs can be executed concurrently</p>

Holdover Items / Any Other Business?

