Savills Hong Kong PMS Project – MRI Submission

Submission Date: 2 July, 2025

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Executive Summary

We are pleased to submit our proposal for the Savills PMS Project. Our solution is designed to meet Savills' strategic goals of enhancing business resilience, optimising operational efficiency, improving market competitiveness, and integrating sustainable practices. With a proven track record in delivering scalable, secure, and user-centric property management systems, we are confident in our ability to deliver a robust SaaS-based PMS that aligns with your operational outcomes—standardisation, risk mitigation, integration, and automation.

What sets this proposal apart is our unparalleled understanding of Savills—your operations, your people, and your priorities. **Maria de Guia**, our Functional Delivery Lead, brings over 14 years of experience at Savills Hong Kong, where she led the rollout of your current system. For the past 8 years, she has been delivering MRI solutions globally. Her unique insight into both your business and our technology ensures that we can map your requirements with precision, reducing ambiguity, accelerating delivery, and materially lowering risk.

Savills is not just a client to MRI—it is a strategic global partner. **Our global CEO** is personally engaged in the Savills relationship, ensuring executive-level sponsorship and priority access to our best resources. This alignment guarantees that your project receives the attention, expertise, and continuity it deserves.

Moreover, Savills teams across Australia and globally are already highly proficient in MRI's platforms and toolkits. This embedded capability enables internal cross-skilling, reduces reliance on external consultants, and significantly lowers the cost and complexity of customisation. It also means that Savills can move faster, with greater confidence, and with less disruption.

These three pillars—deep operational knowledge, strategic alignment, and internal capability—combine to de-risk this transformation in a way no other partner can offer. With MRI, Savills has a trusted, proven partner who not only understands your business but is invested in your success. We are confident in our ability to structure the right commercial relationship—one that delivers measurable value, long-term scalability, and the best possible return on investment.

執行摘要

我們誠摯地提交本次第一太平戴維斯 PMS 項目的提案。我們的解決方案專為支持第一太平戴維斯實現其核心戰略目標而設計，包括：增強業務韌性、優化營運效率、提升市場競爭力，以及整合可持續發展實踐。憑藉我們在交付可擴展、安全且以用戶為中心的物業管理系統方面的卓越實績，我們完全有信心提供一個堅實、基於 SaaS 架構的 PMS 系統，與第一太平戴維斯所追求的標準化、風險緩解、整合與自動化成果高度契合。

我們的提案之所以脫穎而出，源於我們對第一太平戴維斯的深刻理解—涵蓋貴公司的營運流程、團隊組成及業務優先事項。我們的功能交付主管 Maria de Guia 擁有超過 14 年第一太平戴維斯香港的工作經驗，曾親自領導您當前系統的部署。過去 8 年，她亦在全球範圍內成功交付 MRI 解決方案。她對第一太平戴維斯業務和 MRI 技術的深度融合認知，使我們能夠精準映射您的需求，消除不確定性、縮短交付週期，並顯著降低實施風險。

對 MRI 而言，第一太平戴維斯不只是重要客戶，更是我們全球策略聯盟中的核心夥伴。MRI 全球執行長親自參與並推動與第一太平戴維斯的合作關係，確保項目擁有高層贊助支持及優先資源配置。這種高度對齊保證了您的項目在整個生命週期內都能獲得充分的關注、專業技術支援與長期穩定性。

此外，第一太平戴維斯在澳洲及全球的團隊已高度熟悉 MRI 平台與靈活工具包，具備深厚的內部應用能力。這種既有基礎不僅能促進內部技能轉移，降低對外部顧問的依賴，更能有效減少客製化的成本與複雜度。這代表第一太平戴維斯可更快速、更穩健地推進系統轉型，並將業務干擾降至最低。

我們的提案建立在三大堅實支柱之上：深入的營運理解、戰略層級的高度對齊，以及成熟的內部實施能力。這三者相互支撐，為第一太平戴維斯打造出一條獨具優勢、風險可控的轉型之路，是其他供應商無法比擬的。與 MRI 合作，第一太平戴維斯將擁有一位值得信賴、經驗豐富且全力投入的合作夥伴。我們不僅深刻理解您的業務，更致力於與您攜手邁向成功。我們深信，雙方將能建立一個長期穩健、具備可衡量價值與最佳投資回報的合作關係。

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Project Proposal

Project Implementation

An Overview of the Proposed Solution

MRI's proposed solution Property Management X + Simplicity Procurement delivers a comprehensive, end-to-end real estate, financial, and procurement management system. This integrated approach ensures seamless operations across property, lease, finance, and vendor workflows—backed by robust automation, compliance, and reporting capabilities tailored for enterprise-scale property portfolios.

Project Overview

MRI has a strong track record of delivering projects on-time and on-budget, and as such will work closely with Savills (Hong Kong) Limited to create a Statement of Work outlining a clear schedule of deliverables. This Statement of Work will be developed in line with MRI's 4D Framework, with key project milestones – Define, Design, Develop and Deploy. Please refer to our 4D Implementation Methodology (Appendix A) attached.

MRI globally offers a team of over 300 implementation consultants, ensuring that we have specific skillsets in each area to ensure successful project delivery. The MRI delivery project will be led by a dedicated and experienced Project Manager, with several functional and technical consultants specialized in delivering their specific areas of expertise (e.g. reporting, API integrations, training, financial formats).

At the project kickoff, Savills (Hong Kong) Limited will be provided with the project team details, as well as several escalation points from your Account Director James Katz, up to our Regional Managing Director, David Bowie. This ensures that any concerns or risks arising throughout the delivery project have clear lines of sight up to our top Executives – ensuring full ownership of successful outcomes.

Contingency planning is an important consideration in any successful project, and as such, we will outline and address key risks and contingencies in our joint Statement of Work.

MRI's Support model ensures that we have experienced, in-house support agents ready to serve Savills (Hong Kong) Limited once the project has reached a Go-Live state. Please see Appendix B for further details of our support model.

On-Site Residency: A Proven Strategy to Reduce Risk and Maximise Value

At MRI, we deeply understand the operational complexity and strategic importance of a transformation project of this scale. Based on our extensive experience across the market, we have consistently seen the significant value that comes from embedding a product specialist on-site with clients—particularly during the critical post-implementation and hypercare phases.

Should Savills (Hong Kong) Limited wish to pursue this model, we are fully prepared to accommodate an on-site residency. With adequate lead time and a clear understanding of the intended roles and responsibilities, we can identify and deploy the ideal resource to work alongside your team.

This approach is not only about support—it's about partnership. On-site specialists accelerate knowledge transfer, streamline issue resolution, and ensure alignment between business needs and system capabilities. Most importantly, they materially reduce the total cost of ownership by minimising rework, shortening response times, and enhancing user adoption.

We've seen firsthand how this model de-risks delivery and drives long-term success. If this is of interest, we would be pleased to collaborate with Savills to shape a residency arrangement that delivers maximum value and confidence.

Technical Design

Savills (Hong Kong) Limited will benefit from MRI's secure, ISO 27001-certified Tier 3 data centres, which include mirrored failover capabilities with a typical recovery time of under one hour. MRI acts as a data processor under the governing agreement, handling personal data within its systems and data centres, with access governed by role-based permissions across its global workforce. Details on subprocessors and MRI's privacy policy are available online:

https://www.mrisoftware.com/subprocessors/
https://www.mrisoftware.com/au/privacy-policy/

MRI's solutions are consistently audited to meet rigorous global standards, including SOC 1 and SOC 2 certifications and ISO 27001 compliance. These certifications reflect our commitment to maintaining the highest levels of security, operational integrity, and data protection. Our practices are fully aligned with international data processing regulations such as the General Data Protection Regulation (GDPR), ensuring that client and personal data is handled with transparency, accountability, and care.

MRI will provide project-specific documentation—including solution designs, configuration specs, project plans, and test scripts—throughout the implementation. Application manuals are accessible via the myMRI portal and the Master Agreement.

Data Migration

Every MRI implementation includes migrating data from existing systems into a unified MRI database. Early identification of key stakeholders and appointment of Data Owner(s) is essential. Data Owners are responsible for coordinating with MRI's Data Migration Consultant to ensure accurate and complete data transfer. We will work with Savills (Hong Kong) Limited to ensure legacy data is of sufficient quality to support accurate reporting in MRI PMX, as part of the project delivery.

Integration Capability

MRI provides an 'open and connected' approach to integrations, allowing connection to third party solutions. During the scoping process, we will detail any integrations that are required to be delivered during the project, however the Savills (Hong Kong) Limited technical team will also have the ability to build bespoke integrations at any time.

Savills Team Technical Capabilities

As a responsible vendor, MRI has estimated the effort for this project based on the assumption that MRI will deliver 100% of the implementation scope outlined in the RFP. However, one of the key advantages of the MRI–Savills partnership is the inclusion of toolkits within the recommended platform. These toolkits, combined with Savills' globally distributed and highly skilled teams, mean that **many integration and customisation tasks can be executed by Savills without the need for additional training**. Furthermore, Savills has a proven track record of successfully completing similar integrations and customisations across its global operations. This experience positions Savills to take on a significant portion of the implementation effort, which could substantially reduce the level of support required from MRI.

Please see Appendix C for Information Security policies.

Pricing Proposal

Solution	Inclusions	Licensing (USD), One-Time	Annual Licensing (USD)
Property Management X *Additional Concurrent Users available at $3,980 USD + SMA*	• Property Management Suite • Financial Suite • Reporting Suite • Toolkit Suite • 120 Concurrent User licenses • Unlimited user accounts	$508,800	$76,320
Simplicity	• Supply Chain Management Suite • Finance Management Suite • Vendor Portal • 50 User accounts	N/A	$119,000
eConnect	• Communication Suite	N/A	$35,000
Cloud Hosting + Helpdesk Support	• 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	*Included*	*Included*
	Year One (USD)	**$739,120**	
	Year Two Onwards (USD), P/A	**$230,320**	

Project Breakdown	Budget Hours	Budget Days	Hourly Rate (USD)	Budget (USD)
Define + Design	875	109.4	$165	$144,375
Develop + Deploy	1,558	194.8	$165	$257,070
Customisations	2,608	326	$165	$430,320
Project Governance	988	123.5	$205	$202,540
TOTAL	6,029	753.6		$1,034,375

Proposal Assumptions

Our Proposal includes:

- Unrestricted access to helpdesk support for trained users within support hours for the duration of the contract.

- Regular software updates for the duration of the contract.

- Unlimited access to myMRI portal.

Assumptions:

- Proposal is valid until 30 October, 2025

- Licensing invoices are annual in advance

- Consultancy days shall be invoices monthly in arrears based upon time and materials consumed.

- All prices are quoted in USD exclusive of local taxes.

- 5-year term, annual increase at the greater of HK CPI or 4%

- Both parties mutually agree not to disclose details of this proposal or other confidential information contained in this document to any other party without the permission of the other party

- MRI retains all intellectual property rights to all MRI products.

- Prices are based on our terms and conditions available at: http://www.mrisoftware.com/termsandconditionsanz

Company Background

Founded in 1971, MRI is a pioneer of the real estate software industry. From the day we opened our doors, we set out to build game-changing solutions.

MRI's comprehensive and flexible technology platform coupled with an open and connected ecosystem meets the unique needs of real estate businesses—from lease administration to property-level management and accounting to investment modelling and analytics for the global commercial and residential markets.

Our Mission

Giving organisations the freedom to transform the way communities live, work and play through the industry's most comprehensive, flexible, open and connected technology platform.

Regardless of size, location, or property portfolio, we understand that every company has unique needs. Real estate owners, operators, occupiers, and investors seek open solutions, configurable to their specific business requirements and goals.

MRI develops lasting client relationships based on nearly five decades of expertise and insight. Through leading solutions and a rich partner ecosystem, MRI liberates real estate companies to elevate their business and gain a competitive edge.

Global Presence, Local Roots

90K	4M+	20M+	5,000	170+
Clients	Commercial leases	Residential units	Employees	Countries

While our operations make us one of the biggest companies of our kind, our experienced and knowledgeable regional teams mean we always offer a personalised approach.

Whilst MRI has had long-standing roots in Asia, we recently acquired Anacle Systems – a prominent technology business in Singapore and Hong Kong. With the acquisition comes not only market-leading technology, but 300+ staff members across product development, support, and professional services (consultancy).

Our Professional Services team in APAC is led by Marcus Roennfeldt – Vice President of Professional Services – who will be the Executive Sponsor ensuring a successful delivery of this project. Under Marcus' leadership, we will introduce Savills (Hong Kong) Limited to the project team – based both in Australia and Asia – with many decades of collective experience in delivering the MRI platform to organisations such as Savills.

Globally we are a profitable and stable business. However, as a privately-owned organisation, MRI does not provide global financial performance metrics publicly. Should we become Savills (Hong Kong) Limited's preferred supplier we would be happy to arrange a discussion around our financial structure and performance.

Appendix A – 4D Framework

Introducing the 4D Framework

MRI's Client-Centric Project Management Approach to Solution Delivery

DEFINE

The Client's unique objectives are defined and agreed, the Project is initiated, and a Project Manager assigned.

DESIGN

Comprehensive Project Planning takes place here, including User Testing, Training Plans and resource scheduling.

DEVELOP

The Client's Solution is developed inclusive of their tailored requirements and end user testing. From there, User Acceptance Testing can commence.

DEPLOY

The Client's Solution is deployed, and the program is implemented. The Project is then evaluated and closed.

Methodology Insights and Use

Value Proposition

- Consistent Implementations for all Software solutions
- Value creation from the first engagement
- Formal Handover process from Sales
- Formal Handover process to Support
- Implementation Intentions, PM Kits
- Enhanced Client experience
- Quality Assured
- Industry leaders in our field

Key Benefits and Business Impact

- Client Centric approach resulting in Successful implementations
- Client satisfaction
- Delivery assurance and adaptability to change
- Global standardization and consistency across all products and teams

Appendix B – Client Support

Our experienced in-house support team have a deep understanding of our software, which enables them to resolve most support calls directly. The teams are based locally and are contactable via the myMRI portal or telephone. Irrespective of which method is used to contact the team, all support calls are tracked and managed to their successful resolution within our dedicated case tracking software.

Support cases can be logged 24/7 via the portal, which allows users to log new cases and track existing support cases.

MRI's Global Client Support group will make every reasonable effort to make sure that submitted cases are assigned the appropriate level of Priority. We respond to cases in the order in which they are received, with consideration given for higher severity levels. Response Time is the time it takes before a Global Client Support agent makes initial contact with the individual who submitted the case.

The Portal is part of the specialist IT solution used by our Support Team and provides clients with up-to-the-minute information on support cases, regardless of whether a call is logged via a phone call or via the portal.

We categorise our priority levels as:

Priority	Detail
Critical	The production system is significantly impaired with core functionality essentially unavailable. Client's day to day use of the Software is severely impacted. There is no available workaround.
Serious	The production system can run core processes, but other functionality is significantly impaired. Client's ability to carry out day to day use of the Software is severely impacted. There is no reasonably acceptable workaround.
Normal	An area of the core functionality is generating errors, but this is not preventing the Client from performing day-to-day use of the Software. A workaround may be available.

We typically work to the following response time targets:

Priority	Response Target
Critical	Live Call Only
Serious	3 hours
Normal	6 hours

*Response times listed above are estimated targets. Response time is not a resolution goal and should not be interpreted as a guarantee of service. MRI's Global Client Support group will use commercially reasonable efforts to adhere to the timeframes listed above. Global Client Support does not provide resolution targets, and Response Time should not be interpreted as a commitment regarding resolution timeframes.

In the unlikely event of an issue, the first point of contact would be the Client Support Helpdesk. If the Support Agent cannot resolve the issue, the escalation chain is Support Team Leader then the Client Support Director and/or your MRI Account Manager.

We have multiple escalation points throughout the company, including the methodology for escalation to our Senior Leadership Team. Your Account Manager will handle that process for you.

Appendix C – Information Security

Business Continuity for MRI

We have a business continuity plan. Daily business as usual tests of cloud-based support systems (e.g., Salesforce, ServiceNow, Office365) and as applicable disaster recovery and backup recovery tests of Cloud systems.

Disaster Recovery - Hosting Services

We will host the solution for Savills (Hong Kong) Limited in an ISO27001 certified and Tier 3 data centre. These suppliers have comprehensive BCPs and have designed their facilities to be resilient.

Disaster Recovery - Client Applications

Each virtual Application and Database server is continuously replicated to the Disaster Recovery data centre.

Disaster Recovery Plans are reviewed at least annually by Applicable MRI Teams (e.g., InfoSec, Cloud Teams) and any changes approved by MRI Legal Team.

Database Restores or Disaster Recovery Activations are subject to annual review by external auditors as part of security certifications (e.g., as part of SOC audits).

Information Security Management System

There are several policies in place to maintain the protection and security of data. The key policies are listed below.

- Acceptable Use Policy
- Clear Desk Policy
- Cryptographic Policy
- Disaster Recovery Policy
- External Audit Policy
  Information Classification Policy
- Networking Security Policy
- Password Security Policy
- Privileged Access Policy
- Security Incident Management Policy
- Third Party Security procedures

Copies of individual policies can be provided subject to our classification policies and the appropriate non-disclosure arrangements being in place.

MRI's Information Security policy includes appropriate controls and measures in relation to:

1. Physical security at all MRI locations involved in the provision of the Services;
2. Technical security with respect to the Client Data in MRI's possession;

3. Organizational security arrangements regarding the employees and other representatives of MRI, its Affiliates, and its sub-contractors, including training and
awareness, staff vetting procedures and other security measures (e.g., use of passwords and security credentials);

4. Disaster Recovery and Business Continuity;
5. Vulnerability Testing and Security Audit; and
6. Data Breach Procedures.

MRI's Information Security policy complies with all laws applicable to MRI related to its security programs. MRI reviews its Information Security policy annually and makes updates as needed from time to time.

Information Classification Policy provides detailed guidance on the application of the Information security classification and provides examples of how to correctly apply the correct classification to information assets and services.

MRI Acceptable Use Policy covers areas including:

- Use of Computers
- IT Equipment and Devices
- Removable Media
- Mobile and Remote Working
- Assets and Office Equipment
- Usernames and Passwords
- Administrator or Privileged Accounts
- Software
- Internet and Email
- Instant Messaging (IM) and Collaboration Platform (CP)
- Reporting Security Incidents
- Acceptable Use Policy Monitoring and Review.

Compliance with policies is a contractual obligation and will be subject to disciplinary procedures if adherence is not maintained.

We undertake vendor/supplier management including information security requirements within contracts, security assessment, Confidentiality and Non-Disclosure Agreements (NDAs), Data Protection Act, Third Party Contracts and Review of Contract Details.

In addition, Key suppliers (e.g., Rackspace, Schellman & Company LLC) are reviewed according to the Information Security Management System requirements (e.g., require a copy of ISO 27001 certificate and associated Statement of Applicability).

MRI's legal team guides Data Protection requirements.

Monitoring

Clients may use myMRI for monitoring and reporting on system availability, and Users can register with StatusCast to view and receive system status updates as well as record live outages.

MRI Cloud monitoring consists of a suite of industry-standard monitoring and threat protection products and MRI utilities with alerts to appropriate MRI Cloud Resources covering, Infrastructure and Operating System Monitoring (e.g., Virtualization, Network Intrusion Prevention, Host Intrusion Detection and Anti-Virus, and Operating System).

MRI Cloud monitoring is in place to prevent failure in performance. Anything with capacity gets reviewed weekly and we scale the environment horizontally as needed. We have constant alerting watching performance and can adjust servers as necessary where we see capacity issues arising.

While there are no restrictions on the volume of data that can be handled by MRI Cloud Solutions, we do not regularly measure response times as there are factors (such as end user internet connectivity, size of data in the process) which are outside of our controls which may impact upon such results. Nor do we typically undertake benchmarking exercises.

We measure our uptime performance over 24/7/365, excluding planned maintenance. Our average uptime has consistently exceeded 99.9%.

We do not typically undertake benchmarking exercises.

PMS User Requirement Checklist

Please refer to Attachment 1 – PMS User Requirement Checklist – MRI Responses.

Savills Supplier Questionnaire

Please refer to Attachment 2 – Savills Supplier Questionnaire – MRI Responses.

- **End of Document -**