CLIENT SERVICE MANAGEMENT - SERVICE GUIDE

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1 OVERVIEW

The overall goal of Client Service Management offerings is to provide clients with tightly-bound service personnel, trained and capable of providing ongoing consultation, change management and support above and beyond the managed services provided by Help Desk, Managed Services and Managed Security Services. Client Service Management offers designated personnel that augment the Hosted Café team to provide tight alignment with client initiatives, greater level of intimacy and additional proactive services. At the onset engagement, the Hosted Café team will work directly with you to design a service management plan that aligns with customer requirements and the resources contracted. Client Service Management offers the following coverage areas:

- Service Alignment and Coordination
- Customer Enablement
- Life-cycle Management
- Incident and Problem Management
- Change Management
- Proactive Tactical Advisement
- Technical Support Liaison
- Documentation

There are two aspects of Service Client Management:

- Client Service Delivery Manager (CSDM)
- Client Service Engineer (CSE)

All Client Service Management customers start with the foundation of a Client Service Delivery Manager (CSDM). The CSDM acts as the lifecycle business partner and first point of contact for the customer's account. Selection of one or more Client Service Engineer (CSE) as the customer's technical advisor, technical lead and supplemental hands-on support. The CSEs are functional engineers specialized in AWS Cloud, Compute/Storage/Virtualization, Network/Security or Collaboration technologies. They augment the Managed Services team with client specific insight and deeper knowledge of a customer's business, IT operations and environment. This team of CSDM and CSE works in tandem with you, the customer, to meet your objectives.

2 SERVICE DESCRIPTION

The Client Service Management is available for customers purchasing InterVision Managed Services and /or Help Desk. It supplements these services with incremental coverage and capability but does not replace InterVision managed services. The Service packages are flexible and there are several variations that may be selected when ordering the Service. As depicted in the table below, the Service may include customer support from a Client Service Delivery Manager (CSDM) and proactive technical consultation and technical support provided by Client Service Engineers (CSE) or through the Hosted Café Operations Center.

Customer may order Service Management in various service tiers that reflect the amount of time dedicated each month. The hours per month included are defined in the service tier and the Customer may order additional packaged hours and resources.

Client Managed Services Spend / Month	Recommended hours per month
Less than $10,000	20*

$10,000 to $23,999	20*
$24,000 to $31,999	30
$32,000 to $39,999	40
$40,000 to $49,999	50
$50,000 to $69,999	60
$70,000 to $89,999	70
$90,000+	80

* this package has some restrictions. This is ideal when a single technology group (Networking, Security, Cloud Computing, Collaboration,...) is being supported and not for when multiple technologies groups are in scope. Multiple technology groups will require multiple CSEs. If multiple technologies are supported, we recommend adding a 10 hours/month of supplemental time per technology group.

2.1 SUPPLEMENTAL SERVICE PACKAGES

The Customer may order additional service time to add to a base Service Management Package as required by submitting a Change Request. Any incremental charge incurs an additional monthly rate. Customer must have a base Service package in order to add Supplemental hours. Additional monthly hours for the Service may be ordered in lots of 40 hours per month. Supplemental packages are co-termed to the original contract term. Supplemental hours are subject to personnel availability and requires advance notice and Hosted Café acknowledgement of availability.

Supplemental Packages	10 Hours / Month
CSDM Only	x
CSE – Cloud, Server & Storage	x
CSE – Network	x
CSE - Security	x
CSE – Unified Communications	x

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2.2 OVERAGES

Overages in monthly hours will be billed in addition to the monthly recurring charge for both the base package and any Supplemental Service Packages.

2.3 CLIENT SERVICE DELIVERY MANAGER (CSDM)

The Client Service Delivery Manager (CSDM) tasks and activities described below and outlined in the responsibility table. Customer and Hosted Café may mutually agree in writing to alter the task or activities by executing a Change Request.

- Client relationship management and service coordination
- Service(s) oversight and administration
- Incident and problem management
- Change coordination
- Release coordination
- Availability advisement
- Performance advisement
- Capacity advisement
- Life-cycle management

Details listed in the Service Responsibility Matrix.

2.4 CLIENT SERVICE ENGINEER (CSE)

The Client Service Engineer (CSE) tasks and activities described below and outlined in the responsibility table. Customer and Hosted Café may mutually agree in writing to alter the task or activities by executing a Change Request.

- Incident and problem management
- Change oversight and/or execution
- Release oversight and/or execution
- Availability administration
- Performance administration
- Capacity administration
- Life-cycle administration
- Hosted Café Ops Center liaison and technical overlay
- Technical advisement

Details listed in the Service Responsibility Matrix.

Service Management may provides services beyond the functions listed above as qualified personnel are available to perform the task and for tasks that can be executed by an individual and does not require additional coordination or project management. These additional tasks or change request needs to be specific and defined vs. open-ended or undefined. InterVision wants to provide maximum value without putting your critical resources at risk. InterVision will use its discretion which additional tasks and change can be accepted. For items outside of scope and reasonable capability, the Hosted Cafe team will refer the request to Professional Services. Tasks that require incremental time will be billed at Service Management overage rates which is currently $175/hour.

Other billable services which occur outside of this function:

1. Implementation Management
2. Migration Management

3. Services outside normal InterVision business hours

2.5 SERVICE OPERATIONS

The CSDM/CSE role will engage with the customer, to determine the appropriate cadence and functions required by the customer based upon the level purchased.

2.6 SERVICE LEVEL COMMITMENT

The CSDM/CSE role due to its custom nature does not include any specific Service Level commitments.

3 SERVICE RESPONSIBILITY MATRIX

The following table breaks down the service elements for covered services, application and devices and the responsibility for each.

	CSDM	CSE	Client
General			
Client relationship management	x		
Regular client touch points	x	x	
Product/service information - Hosted Café	x		
Informing client of Hosted Café changes	x		
Service Administration			
Service execution reports: activity overview & metrics	x		
SLA management	x		
Incident / Problem Management			
Escalation management assistance	x		
Incident and problem trending and reporting		x	
Root cause communication	x		
Root cause determination		x	

	CSDM	CSE	Client
Customer-specific incidence impact communications	x		
Capturing and orchestration of customer play book procedures (contact information, overall customer documentation)	x		
Management of run book for non-standard processes (technical run book) for covered devices		x	
Change Management			
Change management coordination	x		
Manage non-standard change requests	x		
Manage emergency change requests	x		
Proactive advisement of Hosted Café maintenance	x		
Release management	x		
Perform routine maintenance on covered systems/ software		x	
Coordinate the production, distribution and updates to configuration document following major changes		x	
Technical review of change execution *		x	
Release and change execution		x	
Execution of major and minor releases, patches			x[1]
Life-Cycle Management			
Coordination with project management team for new and major service integrations	x		

	CSDM	CSE	Client
Quarterly review of infrastructure monitoring - thresholds for proactive alerting	x		
Review authorized customer contact list	x		
Develop and maintain service documentation	x		
Custom infrastructure operational reports	x		
Develop and maintain technical documentation		x	
Document customer needs, problems, interventions and interactions		x	
Proactive recommendations of vendor approved patching and releases		x	
Review device configurations to standards		x	
Review customer deployed infrastructure		x	
Optimization of service uptime		x	
Processing of any alerting modifications		x	
Alerts creation and associated tasks		x	
Services Escalations		x	
Respond to customer-initiated service calls as directed		x	
Assist Hosted Café operations center with troubleshoot and solve technical issues with customers		x	
Availability and uptime report		x	
Gather Performance and Capacity data		x	
Performance reporting		x	

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	CSDM	CSE	Client
Capacity reporting		x	
Make technical suggestions regarding systems		x	
Critical Patch Identification – research vendor notifications of critical patches and periodic checks		x	
Security Specific Tasks (requires designated Security CSE and associated Managed Security Services service(s))			
Firewall devices audits (requires Managed Security Services Scanner or additional monitoring tools) and change oversite		x	
Security event trend and threat analysis – mapping events to emerging threats and trends for risk identification		x	
Administer Managed Vulnerability Scanner reporting, advisement and escalation of critical issues		x	
Analysis of Malware trends (from Managed Security Service)		x	
Analysis of IPS events		x	
Administer Security Awareness Training program (Requires Managed Security Awareness Training service)		x	
Review of customer access management policies			x[1]
Other			
Support of software applications not defined in Hosted Café work orders			x

1 Hosted Café Professional Engineering Services can be purchased to assist.

3.1 ADDITIONAL CUSTOMER RESPONSIBILITY

The customer is responsible for coordinating availability and communications via the CSM.

![InterVision logo]

The customer will be responsible for communicating any changes that affect the environment and the specific technologies supported by the service management team. Initial documentation and role definition discussions will be occur to determine service prioritization.

4 SERVICE DELIVERY

4.1 ONBOARDING

Onboarding will be project managed and includes the following phases:

Kick Off

- Understand customer current state

- Communicate existing pain points

- Understand perceived gaps

- Define customer success criteria

    • If possible, provide KPIs or SMART goals

- Define cadence calls/processes

- Define performance/heath checklists

Month 0-2 Documentation (depending on complexity of environment)

- Customer true-up (supported devices)

- Customer playbook

    • Device impact
    • Visio diagrams
    • Defined standards
    • Definition of QA checks/audits
    • Establish technical baselines

- Client executive summary report (current status)

Ongoing

- Operational calls

    • Review ongoing initiatives/open items
    • Review scheduled maintenance/changes
    • Service review/recommendations

- Updates to InterVision documentation

- Weekly performance/health checks

- Monthly client executive summary report

5 SERVICE TERMS AND CONDITIONS

The Hosted Café Service Management will offer the following service terms.

CSDM and CSE services provided during business hours Monday-Friday except Hosted Café holidays unless otherwise defined and agreed upon. After-hours tasks and activities are possible, however prior scheduling and commitment is required via the Service Management supervisor and may have incremental fees.

Incremental time over the contracted amount will be billed at our standard hourly rates which is currently $175/hour.

Unused service hours do not carry over from month to month.

Client Service Management is performed remotely and does not include client site visits. Site visits, if requested, will be reviewed. All time and travel expense associate with a site visit will be billed incrementally to the recurring fees.

All available collaboration tools will be utilized as appropriate to increase interaction effectiveness which may include video conferencing, collaboration rooms, etc. as required. These tools are provided by Hosted Café and are in addition to our ticket system, email and phone support.

All Managed Services, Managed Security Services and other Hosted Café services SLAs continue to apply as described in their respective work orders. Due to the custom nature of service management there are not specific SLA for the Service Management role.

6 COMMERCIAL ITEMS

The following are Service Management specific orderable services.

Items	Contract Options - Monthly recurring fee.
Client Service Delivery Manager (CSDM) Only	Minimum 20-hours, can be increased by 10/hours per month.
Client Services Management – Standard Package including a CSDM and CSE	Minimum 20-hours, can be increased by 10/hours per month.
Client Services Management – 10 hour supplemental packages	Additional hours can be added and co-termed with existing Service Management package.

* The Bronze package can only be applied where the service focus is on a single technology and cannot be utilized when multiple technologies are in scope. The Bronze package supports environments with 1- 249 devices under coverage. Multiple technologies and/or 250 devices must utilize Silver and above.

7 DEFINITIONS

CSDM - Client Service Delivery Manager is a designated resource upon general aspect of the the specified services.

CSE - Client Service Engineer is a designated resource focus upon technical aspects in their area of technical specialization.

Managed Security Services - is the InterVision Managed Security and SOC services.

Managed Services - is the InterVision managed infrastructure, network and collaboration service.