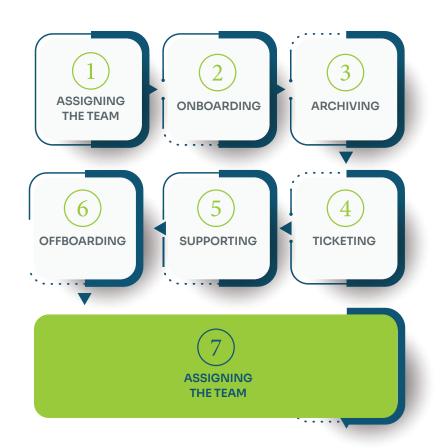**SPINNAKER**
SUPPORT

What Is The Typical 3PSS Customer Journey?

Your Assigned Support Team

Immediately following the scoping phase, you'll be assigned a permanent customer success team hand-picked for your organization. Running Point is an assigned Account Support Lead (ASL), an industry expert with an average of 16+ years of experience. The ASL becomes an extension of your internal IT department and serves as your single point of contact throughout the contract's life.

1. **ASSIGNING THE TEAM**
2. **ONBOARDING**
3. **ARCHIVING**
6. **OFFBOARDING**
5. **SUPPORTING**
4. **TICKETING**
7. **ASSIGNING THE TEAM**

You'll also be assigned a team of named engineers and archivists, determined by your application environment, technology stack, ticket history, geographic footprint, language requirements, IT staff capabilities, planned IT roadmap, etc. Our teams combine application, development, technology, security, interoperability, and cloud experts. Your team will know about every ticket you've logged, your conversation with them, and your unique technology-stack landscape.

Our engineers operate from up to eight global operations centers in strategic locations worldwide. This global team works on high-priority (P1 and P2) issues through an efficient hand-off from one team member to another, using a follow-the-sun, 24 x 7 x 365 resolution process. Because your team is familiar with the specifics of your deployment, the transitions are smooth, and issues are quickly resolved — and because of their extensive background experience, your assigned team has seen it all. The team is fully equipped to support your application versions within a wide range of combined surrounding technologies. Our current customers have found that their assigned teams adjust to their evolving needs and assist in advising on their roadmap, all while ensuring that their applications remain available, effective, and secure.

Onboarding Your Organization

Before the cutover, our customer success team and ASL will lead you through a phased onboarding process to ensure a smooth transition to third-party support. This onboarding process drives the following:

1. **Clear roles and responsibilities —** We'll work with you to identify crucial roles, responsibilities, communication protocols, and resources. You'll know who's handling each onboarding activity.

2. **Project management —** Using the proven ISO 9001:2015-governed processes, we'll inform you about necessary action steps, predictable timetables, task owners, and progress for a seamless transfer. For every step of the process, you'll know what will happen, when, and who will take charge of it.

3. **Knowledge transfer** — Using our established approach, we'll learn about your environment during onboarding, including your customizations, previous support issues, and relevant business processes — and we'll begin building relationships with contacts on your staff. This helps our team deliver tailored, effective support during live operations, from the first call to resolution.

Each phase of our onboarding process supports the continuous knowledge transfer of your practices, processes, culture, and technologies to the core team— and its duration depends on several factors, including your system's complexity and the scope of services you need.

CUSTOMER SELF STUDY ▶ DOCUMENT QUESTION ▶ DOCUMENT REVIEW ▶ UPDATE DOCUMENT ▶ INTERNAL SHARE ▶

SPINNAKER™
SUPPORT

Creating Your Archive

Archiving is the download and storage of relevant software and data you're legally entitled to download and store using an ISO 9001:2015-certified archival approach and ISO-27001:2022 processes for data security.

Following the discovery process, your assigned archival team will create a searchable library on your network that includes licenses, uninstalled upgrades, patches, and related materials. You can retain, access, implement, and use the archived material as we advance.

This archive only contains the information you were legally permitted to download as a support customer. This way, we also carefully protect the software publisher's intellectual property (IP) rights. Archiving occurs after you've decided to switch to 3PSS but before your publisher maintenance contract ends. Depending on your application landscape, you'll want to budget four to 12 weeks to allow enough time before your cutover date — especially before the end of the software publisher's fiscal year.

Ticketing and Issue Resolution

Support should be fast: Responses to issues should arrive in minutes. When you say a ticket is a high priority, we believe you and guarantee a response within 15 minutes. SLAs provide response times for tickets of lesser priority. Our leading objective is to ensure that every issue you send us is resolved promptly.

Submitting Tickets

3PSS covers diagnostic services, product fixes, and/or operational workarounds for software issues identified in standard delivered code.

This section describes the various types of support and processes you should expect from 3PSS.

Break/Fix Services

If you're like most customers, you have some degree of custom code to support the unique business needs that your software was not designed to handle. That said, many issues originate in custom code at the application, tools, and database levels. 3PSS vendors troubleshoot and resolve problems that customizations may have caused. If you have any issues related to existing customizations, engineers will work with your resources to analyze them. If the root cause is the core software code, we'll develop a fix for it; if the root cause is with the custom code, we'll guide whatever changes you need to support the customization.

The most common method we use to deliver fixes is through a remote connection to your environment, where issue analysis, troubleshooting, and debugging occur. Once your issue is isolated, a solution is designed and tested within your test environment/sandbox, affecting only the required changes and minimizing the impact on other programs and objects.

As a rule, software publishers don't support customized code. Usually, they require the installation of a packaged update that may contain changes you don't want in other parts of your application, including your customizations. This increases the risk of "breaking" other parts of the application, resulting in lost time, frustration, and greater expense to you. Vendor-patch installations usually require significant regression testing that increases the time it takes to deliver a production solution, especially if you need to test multiple areas of functionality.

Third-party support lets you keep the software modifications and updates created for you — on your servers. In doing so, we ensure your specific work product and any related supporting documents used while solving the issue are available to you when needed. The resulting code fix is your property and/or that of the software vendor and IS NOT stored on our computers once the case has been closed.

Interoperability Support

Third-party support helps maintain your interoperability and manage the changes in diverse applications, databases, and other system layers of any technology stack that might have a ripple effect across your

Technical Advisory Services

Third-party support provides advisory services as part of our standard support model, including virtualization, cloud migration, license compliance and audit defense, and roadmap planning. We include these services to help you make more informed technical and business decisions.

Security and Vulnerability Management

Depending on the software version, publisher support provides security patches for some customers, and these patches are terminated when you switch to 3PSS.

When you transition to third-party support, we'll provide you with a far more comprehensive vulnerability management solution at no

additional charge, and it is included as part of our standard agreement. We author fixes that don't require access to publisher patches, with each fix catering to your unique needs — meaning you won't have to worry about any side effects on other parts of your system. And because they're on-demand and specific to you, we can test and implement them much faster through changes that have little to no impact on the actual code.

Global Tax and Regulatory Compliance

Governing authorities in dozens of countries and all 50 U.S. states implement tax and regulatory changes throughout the year. The software publisher typically provides these in one-size-fits-all updates. In contrast, 3PSS delivers custom updates by continually researching, monitoring, and gathering specific requirements on your behalf.

Our personalized tax and regulatory process is also proactive and delivered in timely updates. We'll work directly with you to schedule and implement all required changes. Our tax and regulatory solution includes:

- A standardized, repeatable process for delivering tax and regulatory updates

- Personalized net-change documentation and test scripts

- Implementation code changes specific to your software version

- Quality-assurance testing for all changes

- Comprehensive follow-up and support for all changes

- Routine communication throughout the year that prepares you for changes to your taxand regulatory environment

Our tax and regulatory experts have developed a proprietary research database that quickly scales these services and solutions whenever they identify new companies and country requirements. Our ISO 9001:2015-certified process minimizes risk by helping you prepare for cyclical and new changes across the tax and regulatory landscape.

Customer Success and Additional Services

Regarding account management, our Customer Success team focuses on our overall relationship with you throughout your entire customer lifecycle. Customer Success works with your organization's leadership, holding quarterly or semiannual executive sponsor meetings to support escalation management, roadmap, and strategic planning.

After switching to 3PSS, many customers realize they suddenly have the budget (thanks to those cost savings) for additional services. Third-party support offers add-on services, and a customer can conveniently append them to their existing contract. These can include:

> **Managed Services High value application, database, and technical managed services designed to optimize performance, build agility & flexibility, reduce cost & complexity, and mitigate risk.**

Offboarding From Third-Party Support

Some organizations stick with 3PSS indefinitely, while others see it as a time-limited option for a specific project, like a migration between environments or from an on-premises to a cloud solution. Regardless, third-party support offers cloud migration advisory services that'll free up your time and resources for an accelerated journey to the cloud.

The process is straight forward:

1. Work through any outstanding issues to find suitable resolutions when possible. If we don't find a resolution by the service termination date, a support engineer will transition the issue to you with all its related documentation.

2. Provide an Issue Management Report that includes all of your ticket activities.

3. For your internal customer systems, deactivate all access granted to us, including VPN connections, user profiles or IDs, TeamViewer (or similar remote-connection tools) sessions, and shared support folders.

4. Ensure backups are made of information within the shared support folder, as it may contain code changes and documentation.

5. For 3PSS Systems — The day after the service-termination date, deactivate your access to the ITSM system (e.g., JIRA), your profiles, and all related address book records.

Regardless of what publisher support has led you to believe, you can always return to their support without negative consequences. Third-party support follows software publisher and industry-standard best practices for code changes and documentation so that you can return to the software publisher's support without the risk of technical or legal issues. And keep in mind that you can renegotiate terms with publisher support that works in your favor, knowing that they'll always take you back. Of course, you will always be welcome to return to 3PSS for future projects.