Client Success Assistance - Service Level Agreement (SLA)

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Versions History:

Version	Date	Authors	Changes
1.0	03-Aug-2020	Philippe Gaudreau	New Procedure, First Issue
2.0	02-Oct-2020	Ericka Moore	Addition of additional services and billing chart
3.0	02-Oct-2020	Ericka Moore	Addition of additional services
4.0	07-Oct-2020	Ericka Moore	Modifications to the billing chart
5.0	21-Fev-2021	Ericka Moore	Modification to the name of the services covered under this agreement to Client Success Assistance, which better reflects the nature of the provided services.
6.0	Refer to document cover page	Ericka Moore	Modification to remove on premises support, service provider responsibilities and modify monthly reporting as well as cosmetic changes.

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1 PURPOSE

This agreement represents a Service Level Agreement ("SLA" or "Agreement") between SOLABS and its customers for provisioning of **Client Success Assistance** services for SOLABS QM.

This SLA is applicable to customers who have Active statement of works (SOWs) on **Client Success Assistance** with SOLABS. Otherwise, the Customer is responsible for providing Support Client Success Assistance as per the LICENSE, SUPPORT AND PROFESSIONAL SERVICES AGREEMENT.

2 ABBREVIATIONS

SLA: Service Level Agreement

SOW: Statement of Work

3 DEFINITIONS

Client Success Assistance: See SOW 0.0 (LICENSE, MAINTENANCE, SUPPORT AND PROFESSIONAL SERVICES AGREEMENT) with SOLABS. Client Success Assistance with active SOW to such effect with SOLABS is further detailed in this document.

Active SOW: An Active SOW means that hours remain for a specific client as per their SOW on Client Success Assistance with SOLABS.

4 APPLICATION AND RESPONSIBILITIES

This procedure is intended in full for members of *Client Success* and *Product and Quality Management* departments at SOLABS. Members of the SOLABS' Client Success Assistance Support team and *Sales and Marketing* department must understand this procedure in principle.

The Client Success department is responsible for the oversight (implementation, review and application) of this policy. The Head of Client Success is the key contact point for clients for Client Success Assistance Agreements.

Product and Quality Management and management is responsible for approving this procedure and any changes related to it.

Product and Quality Management is responsible for Evaluation of implementation and application of the procedure is performed through internal audit activities.

5 REFERENCES DOCUMENTS

- In performing Client Success Assistance services, multiple documents available in SOLABS eRoom and Knowledge Base (https://docs.solabs.com/hc/en-us) are to be used and referenced.
- WI000017 - Process of Creating and Monitoring Client Success Assistance Agreements
- CP000002 – Service Level Agreement (SLA)

6 POLICY

6.1 OBJECTIVE

The objective of this agreement is to obtain a mutual understanding as to the services provided by SOLABS to a Customer when SOLABS is hired by any Customer to provide **Client Success Assistance.**

6.2 STAKEHOLDERS

The following Customer and Service Provider will be used as the basis of the agreement and represent the primary stakeholders associated with this SLA.

Service Provider: SOLABS

Customer: ***All*** customers who actively use SOLABS QM in a Production environment AND have an Active SOW in place, where service hours remain in their bank of hours.

6.3 SERVICE SCOPE

The following services are included in the scope of this agreement:

- Client Success Assistance services for Hosted installations of SOLABS QM (Core software, QM APPS, Reports, eRoom, etc.) which includes:
    - **Virtual QM10 Product Specialist**
    - **Virtual QM10 Client Success Assistance Technical Support**
    - **Virtual QM10 Analytics Specialist**
    - **Virtual Training Specialist**
    - **Virtual data Migration Specialist**

    See Appendix #1 for detailed description of services.

6.3.1 Customer Requirements

Customer responsibilities and/or requirements for support as part of this agreement include:

- Allow for SOLABS to create accounts within the customer's production environment with all "System Roles" assigned, along with an FCT role defining their function. Note that Customer will not be charged for such SOLABS' accounts. Accounts will be created for the principal contact and backup (at least 1).
- *Customer* must provide a point of contact per each SOW.
- *Customer* must communicate requests to SOLABS' principal contact identified in the SOW.
- *Customer* is responsible to provide SOPs for the administration work which needs to be performed. SOLABS may assist customers in developing SOPs as per this SLA and within the scope of an Active SOW.
- *Customer* must provide assistance and collaboration to SOLABS in order to provide logistics and also setup meetings with end-users when needed.

6.4 Service Management

6.4.1 Service Availability

Coverage specific to the services in this Agreement are as follows:

SOLABS SUPPORT CLIENT SUCCESS ASSISTANCE SERVICES	
Principal Contact (SOLABS)	
E-mail: See SOW for point of contact. Phone: See SOW for point of contact.	Monday – Friday from 9:00 – 18:00 (EST)

6.5 Service Requests

The Service Provider will respond to service requests submitted by the Customer once all requirements and specifications have been communicated, assessed, and approved. The Service Provider can then provide a timeframe for the request fulfilment when such request is not immediately answered to.

7 Monthly Reporting

SOLABS can provide a monthly count of hours left per each Active SOW to the identified client representative.

8 BILLING TERMS AND CHART

Detailed billing terms can be found in the client specific agreement.

Services provided as per this SLA will be billed using the following 15 minutes increments billing chart:

Minutes Worked	Time Billed Minutes	Time Billed Hours
1 - 14	15	0.25
15 - 32	30	0.50
33 - 44	45	0.75
45 - 62	60	1.00
63 - 74	75	1.25
75 - 92	90	1.50
93 - 104	105	1.75
105 - 122	120	2.00
123 - 134	135	2.25
135 -152	150	2.50
153 - 164	165	2.75
165 - 180	180	3.00

9 APPENDIX #1: DETAILED DESCRIPTION OF SERVICES

- Client Success Assistance services for Hosted installations of SOLABS QM (Core software, QM APPS, Reports, eRoom, etc.) which includes:
  - **Virtual QM10 Product Specialist**: Instructions on system functionalities, Q&A's, walkthroughs, short training sessions, knowledge references, etc.
  - **Virtual QM10 Client Success Assistance Technical Support:** Resolution of simple issues such as password issues, configuration issues, navigation issues as well as escalation to Level II Support for more complex issues that require an investigation be opened.
  - **Virtual QM10 Analytics Specialist**: Training on the SOLABS Standard Reporting offering (Core and QM APPS, Excel and SSRS), training on the reporting portal and creation of Ad Hoc Reports and Analytics by Nexgen Analytics (an approved SOLABS' supplier).
  - **Virtual Training Specialist**: Creation of elaborate training material on QM10 such as client specific super- user and end-user guides, online quizzes on QM10 knowledge for super-users and end-users, training workshops and creation of client specific training videos.
  - **Virtual data Migration Specialist**: Simple and efficient manual migration of client data by a SOLABS product specialist

  - **Virtual QM10 Administration Services**
    - **User Management**
      - Create new users
      - Modify users – add/remove Roles, change reporting relationships
      - Deactivate exiting users and reassign pending tasks as necessary
      - Create/assign Roles
      - Unlock users
    - **Custom Lists**
      - Create/modify
    - **System Attributes**
      - Create/modify
- **System Configurations**
  - Create/Modify
    - **Document Administration**
      - Create/modify Document Types
      - Create/modify Document Workflow Templates
      - Create/modify PDF Rendering Templates
      - Run Document Status Queries
      - Document Coordinator for Document Control Process
      - Create/modify documents from draft/tracked changes versions and route for review/approval
      - Import legacy documents and route for approval

  - Create/modify Folder Structure (Tree view)
  - Modify document location
  - Modify folder/document privileges
- **Training Administration**
  - Create new Curriculum
  - Create new Training Activities
  - Link Training Activities to FCT Roles
  - Assign End Users
  - Run Training Status Queries
  - Training Coordinator for Document Control Process
  - Create Training Assessments in Questionmark
- **Process Administration**
  - Assign/remove Process Roles
  - Reassign Process Tasks
  - Run Process Status Queries
- **Reports**
  - Create reports with custom parameters (filters, hidden columns, etc.)
  - Create Report Subscriptions