

1. Implementation Management

All new clients are assigned a dedicated Implementation Manager who will own the client onboarding experience. Prior to the client signing the contract, the Implementation Manager will partner with the Ascent360 sales team as needed to ensure new clients are set up for success and have clear expectations.

The client implementation process includes the following:

- Sales-to-Implementation internal call
- Client Implementation Kick-Off call
- Collaboration with client technical resources to facilitate data onboarding and any integrations
 - Initiated in the Kick-off call, ongoing thereafter through completion
- Collaboration with client partners as needed
 - **Client facilitation** of collaboration with their partners is required
- Management and communication with Ascent360 cross-team resources
 - Weekly status updates
 - Ad hoc updates in Teams 'implementation thread' as needed
 - Escalations for timeline, vendor, or scope issues.
- Regular client communications and meetings, when required
 - Weekly progress updates
 - Outstanding deliverables and next steps
 - Timeline adherence and/or modifications
- CPD Launch Call and internal Handover-to-CSM call

2. Client Support Model

Ascent360 offers a variety of support tools and services to meet the needs of our clients. Our support options include:

- Client Help Desk Support – Standard for all clients
- Client Success Management (paid time for a dedicated CSM) –Recommended yet incurs an extra cost
- Professional Services (paid support for custom work and projects) – Optional for enterprise level clients and custom projects. *Can be ad hoc or recurring.*

Client Support

All clients receive client support for general questions and support with standard features. This includes access to

our HelpDesk knowledgebase of articles as well submitting help requests via our ticketing system. When creating a new ticket, clients will receive a list of articles that may address and resolve their question. If a ticket is created the client will receive an immediate confirmation and ticket number via email, along with the ability to review and edit their open ticket as needed. The Help Desk is managed by our Client Support team and tickets are usually responded to within one business day.

Client Support includes:

- Assistance with standard features and settings within the platform
 - Standard features include all functionality that is already built into the solution and included in the client's contract
- Inquiries for advice on best practices
 - Help with email strategies and marketing campaign recommendations
- Reporting of potential issues with standard functionality & troubleshooting
 - Clients can report any issues with existing functionality as they occur
- Time with a Specialist
 - 30 minute sessions with a product specialist for one on one support, scheduled in advance as needed by the client and based on availability.

Client Support does not include:

- Professional Services
 - Custom work or projects that cannot be completed within the standard functionality and within the contract are not supported
- Standard tasks on behalf of the client
 - The Ascent360 support team will gladly steer you in the right direction when you get stuck. But we'd rather teach you to fish than fish on your behalf!

Client Success Management

In addition to our standard client support above, Professional and Enterprise level clients are eligible to purchase dedicated support from one of our Client Success Managers.

Client Success Management support includes:

- Client Support detailed above, PLUS
 - An assigned Client Success Manager
 - Work with the same person for each interaction (excluding HelpDesk tickets)
- Regular phone calls with your CSM
 - Recommended weekly for 6 to 8 weeks, monthly thereafter (depending on the number of support hours in the contract)

- Review marketing plays, reports, ROI performance
- Strategic planning and advice
- Updates on any open client requests
- Direct access as needed during business hours
- Troubleshooting
 - Not deducted from 6 hours if a bug is identified
 - Deducted from 6 hours if it is a user error, training gap, or no bug is found

Client Success Management does not include:

- Professional Services
 - Custom work or projects that cannot be completed within the standard functionality and within the contract are not supported
- Standard tasks on behalf of the client
 - The Ascent360 support team will gladly steer you in the right direction when you get stuck

Professional Services

Custom development and projects are required to include Professional Services. These services include one on one support from one of our Client Success Managers as described above, but also custom and technical support.

Professional Services includes:

- Professional-level support with Client Success Management detailed above, PLUS
- Custom support, examples include
 - Data integrations
 - Data analysis
- Ad hoc and incremental custom requests
 - Due to complexity or high levels of effort that exceed the time purchased, an incremental Statement of Work (SOW) may be required to meet a client request
 - SOW's will include requirements gathering with the client, and estimation for client approval, and a projected timeline for completion
 - The SOW will be a Time and Materials agreement, with all hours worked being billed to the client at the end of the month that they were worked
- Annual Account Reviews
 - A 1 to 4 hour (depending on the number of support hours in the contract) deep dive into overall performance, operational opportunities, and strategic planning for the upcoming year.