



T S A N E T

Your Technology is Connected. Are you?

# Custom Groups – Version 2 Dec 2013

TSANet eBook

PHONE

WEB

9401 Indian Creek Pkwy, Overland Park, 66210

+1 913 345 9311

[www.tsanet.org](http://www.tsanet.org)

# TSANet Custom Groups

## Contents

Creating Custom Group Relationships in TSANet .....	3
Scope.....	3
The TSANet Open Group Relationship Model .....	3
Custom Group Relationship Options .....	4
Utilizing the TSANet legal framework .....	5
Utilizing the TSANet Database .....	6
Custom Group Case Studies.....	7
Case Study # 1 .....	7
Case Study # 2 .....	7
Case Study # 3 .....	7
Implementing a Custom Group Relationship.....	8
How to Implement your Custom Group .....	8
Is this a hosted relationship? .....	8
Do you want to define the following support elements? .....	9
Do you want to require a specific experience level of engagement? .....	9
Should the process engagement process fail, how defined do you want the escalation process to be? .....	9
Adding Members into your Custom Group.....	10
Adding Non-Members.....	10
Adding Existing Members into your custom group.....	10
Suspension, disqualification or termination requirements?.....	10
Baseline Addendum for Custom Groups.....	11

# TSANet Custom Groups

## Creating Custom Group Relationships in TSANet

---

### Scope

This document is designed to assist members in understanding the method for creation of Custom Groups. This document covers details regarding the process for creation, options and implementation of a Custom Group relationship. This document will not address membership level categories or pricing options. TSANet can offer its members a very detailed and customizable relationship structure. Members interested in creating Custom Groups should contact the TSANet office for more details. This document will give members a base line education about utilizing this powerful benefit of membership.

Standard Members of TSANet can utilize the TSANet infrastructure to create or participate in Custom Group relationships. These relationships can come in various forms to meet a variety of relationship needs.

### The TSANet Open Group Relationship Model

To understand how easy Custom Groups can be established, it is necessary to have a grasp of the existing TSANet relationship structure. Historically, TSANet established many-to-many relationships known as Open Groups. The major benefit of an Open Group is that a member can join into a single relationship and establish a collaborative relationship with multiple partners. Understanding the existing Open Group model will help you define how to better structure your Custom Group. In TSANet Open Groups, there are four main elements all members agree to abide by:

1. Members agree that there must be a **Mutual Customer** involved in any interaction between members. The definition of a Mutual Customer may vary by the relationship based on the requirements established by the member.
2. Members will define the **hours of operations and global** requirements. Many members may restrict product sets, may or may not provide 24/7 global support.
3. Members agree to **collaborate on an issue to isolation and/or resolution**. The point of an Open Group relationship is to establish engagement and collaboration between members; not put the Mutual Customer in the middle of the problem resolution. No member is required to collaborate until the issue **is resolved but must collaborate** until the problem is isolated, an owner established for problem resolution, and that information is communicated to the customer
4. Depending on the elements of the relationship, a member must meet the minimum **Service Level Objectives (SLO)** response times. SLOs will vary between relationships to meet the needs of most members. SLO response times are minimum response times. Most, likely the response will be based on the Mutual Customer's entitlement.

# TSANet Custom Groups

There are two Open Group relationships currently in place for TSANet members. The elements of these relationships meet the majority of relationship needs for the industry and are used as a template to define the elements of a Custom Group.

## Basic TSANet relationship elements:

- Mutual Customer defined by Member
- Hours of Operation defined by Member
- SLO of Next Business Day in Severity 1 / No SLO for non-Severity 1 cases

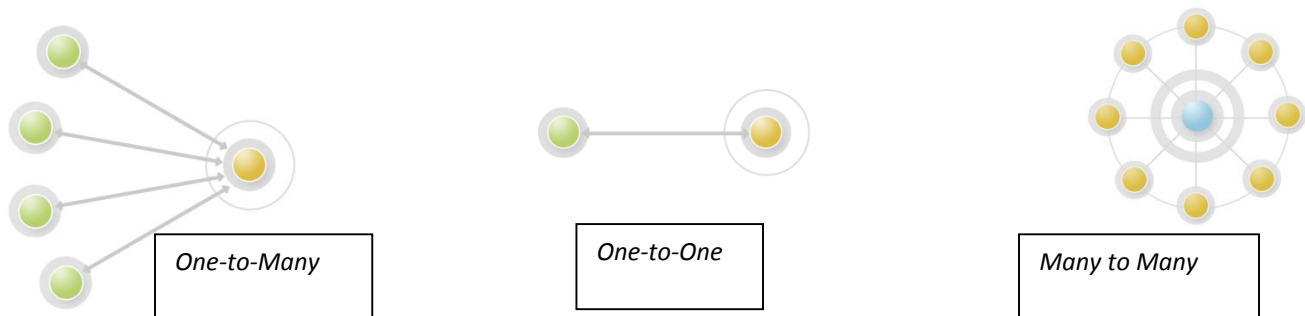
## Premium TSANet relationship elements:

- Mutual Customer defined as a customer with 24/7 entitlement
- 24/7/365 Global Support Required\*
- SLO of 2 Hours / Severity 1, 4 Hours / Severity 2, Next Business Day / Severity 3

\*Members are required to support customers worldwide. However, if a member does not have global customers, this does not prohibit them from participating

## Custom Group Relationship Options

Members may create Custom Groups to fit their specific needs. For example, if a member has a specific product set where it would be beneficial to have an engagement process with multiple partners, they could host a relationship and request participation from additional companies. This foundation allows a member to sign-up partners without creating a separate agreement for each individual partner. From the host perspective, this becomes a **one-to-many relationship** model and from the partner perspective, the relationship is a **one-to-one** relationship with the host.



Should a member need to identify separate support elements for each individual partner, a Custom Group can be created for each individual partner. Where this may be necessary for specific situations, most relationships can be established with a common set of support elements. The processes a member will use can be customized to engage with other members and will be discussed later.

# TSANet Custom Groups

## Utilizing the TSANet legal framework

---

A major benefit to TSANet membership is the ability to utilize the legal framework established and utilized since 1993. There are three main legal documents that comprise the TSANet legal framework:

- Database and License Agreement
- Code of Conduct
- Relationships Addendum

The Database and License agreement and Code of Conduct are base level documents. Each member, regardless of level of membership or relationship(s) participating, agrees to these base-level documents. The documents contain industry standard verbiage defining member behavior, confidentiality of information between members and additional elements of TSANet membership.

In creating a Custom Group Addendum there are several areas that need to be defined. A Custom Group Addendum template ([See Exhibit A](#)) has been created to help members and TSANet staffs create the Custom group. The following elements will be created within a Custom Group:

- Structure of relationship (e.g. one-to-many / one-to-one)
- Host of relationship if applicable
- Support Elements
  - ✓ Use Criteria
  - ✓ Hours of Operation
  - ✓ Mutual Customer Definition
  - ✓ SLOs
  - ✓ Global Requirements
  - ✓ Escalation Requirements
- Relationship Business Elements
  - ✓ Responsible Parties
  - ✓ Disqualification
  - ✓ Termination

Within Custom Groups, the termination clause is modified to allow the host of a relationship the authority to invoke suspension and/or termination. TSANet will only be allowed to terminate a member in a Custom Group should there be a violation of a nature that would affect other members in an Open Group relationship.

# TSANet Custom Groups

## Utilizing the TSANet Database

As a member, the TSANet database can be customized to streamline the engagement and collaboration process at an operational level. The database, which contains the operational procedures for collaboration, can be customized to fit the needs of the Custom Group. All Custom Group documents are only visible to those in the group. As with all TSANet relationships, members will have authority to create and/or edit process documents. The database will send an auto-generated request to members every 90 days to verify or edit their process documents.

Database features include:

- Encrypted URL support portals customized to your needs
  - ✓ Links to all partners, groups of partners, specific partner(s)
  - ✓ Ability to specify limit access
- Ability to assign process documents to specific departments or create departments specifically for a Custom Group
- Ability to create a process of engagement for a group or individual members within the groups
- A customized landing page to enable members to easily join the custom group

vmware | technology alliance  
PARTNER

VMWARE CUSTOMER SUPPORT COMMUNITY (TAP)

**Company Information** >  
Contact Documents  
Payment  
Complete

**VMware Technology Alliance Program (TAP) Customer Support Community (Limited TSANet Member)**

The TSANet/VMware TAP Community facilitates seamless global collaboration between TAP Program Partner support organizations that best addresses mutual customer problems. Availability and response time depends on the mutual customer's entitlement. All partners also provide 24x7 Escalation contacts.

If your company is already a member of TSANet ([click here to find out](#)), please contact TSANet directly at +1 913 345 9311 for pricing and implementation.

TSANet, founded in 1993, is a worldwide, vendor-neutral, not-for-profit organization that provides the legal framework and contact database to foster multi-vendor problem-solving. VMware is utilizing TSANet's expertise to establish a collaborative ecosystem where VMware and its global partners can address customers' multi-vendor virtualization problems.

By registering below, you will be joining TSANet as a Limited Member. The VMware/TSANet support portal provides the framework for engagement in multi-vendor support interactions surrounding virtualization issues and potential interdependencies with other products (e.g. operating systems, databases, application software and hardware). For support issues that do not involve a virtualization product, your support organization should continue to rely on other support processes. Non-virtualization issues are considered outside of the scope of this VMware/TSANet engagement portal.

Once you have completed the registration process, you will receive a user-id and password which will allow you to gain access to the TSANet database to post contact and escalation information, products supported and entitlement instructions.

You must also agree to the [Relationship Documents](#), [License Agreement](#), and [Addendum](#)

Company  First Name

# TSANet Custom Groups

## Custom Group Case Studies

---

### Case Study # 1

*Problem* – Vendors A and B are marketing a joint solution sold to the end-user. A support relationship between the new companies needs to be established to ensure the companies can collaborate to provide seamless support to the mutual customer. The customer will benefit from a single-point of contact. Customers are expected to call Vendor A as support entitlement is only established with Vendor A.

*Solution* – A single one-to-one relationship is established that contains automatic entitlement (e.g. account number) from Vendor A to Vendor B. An engagement process is defined to route calls to personnel with specific knowledge surrounding the solution. A warm transfer process is included in the relationship's process documents and there is a feedback mechanism invoked via the TSANet database.

### Case Study # 2

*Problem* – Vendor A is providing a major hardware version upgrade to a series of products. The accounts potentially affected are high visibility, enterprise-level customers. Potential problems require high-level back-line engineers be engaged with similar level engineers at multiple companies. Enterprise level entitlement will be shared with all members of the Custom Group.

*Solution* – Vendor A hosts a one-to-many relationship with defined elements for routing calls direct to back-end engineering resources with all members of the group. A separate process document is posted for a select group of individuals and guidelines are posted for the use of the relationship.

### Case Study # 3

*Problem* – Vendor A has multiple partners that co-develop products utilizing the core software manufactured by Vendor A. When support issues occur, the customer may contact either the partner or the vendor. A sub-set of partners need a different path as their interaction involves another product group. A relationship needs to be established to ensure that both partner and vendor have a mechanism for collaboration.

*Solution* – A one-to-many relationship by the host is established with the guidelines and support elements defined for all partners. A landing page is created for new members to join into the relationship and an encrypted URL is automatically sent to the partner on joining. A separate process document is created and assigned to the sub-set of partners that need to be directed to another support group.

# TSANet Custom Groups

## Implementing a Custom Group Relationship

---

### How to Implement your Custom Group

TSANet has made the process of creating and implementing a new relationship simple. Utilizing the existing legal framework (i.e. Code of Conduct) and database allows our members to be leaps and bounds ahead of the typical creation and implementation of a one-to-one cooperative relationship outside the TSANet process. The support elements of the relationship are compiled into your Relationship Addendum. The creation of this Addendum is typically a joint effort between TSANet staff and you.

Before you get started with the specifics of the Relationship Addendum, let's cover a few implementation basics. Companies joining your relationship must either join TSANet or already have some type of membership in TSANet. In either case, implementation should be easy and you can rely on TSANet staff to help guide participants of your custom group. In most cases, your involvement in promotion of the relationship will be the key to efficient implementation. TSANet's role is to assist our members in education of new partners about the TSANet organization and your custom group. We do this via joint web conferences and marketing materials. Your introduction to new members of the overall relationship concept and high-level view of TSANet will be instrumental. For example, giving TSANet a list of new members without any type of introduction will likely not be effective. Having a joint plan on guiding new members into your group will save a tremendous amount of time and potential frustration. What types of members and the approach to implementation of them is an area that should be covered in our initial consultation.

Having the answers to the questions listed below will help when crafting the Addendum. The typical approach is for TSANet staff to prepare a draft for discussion and review. When finalized and approved, we can take several approaches to implementation of members.

Here are a few items that will help in the creation of your relationship. Please refer to Exhibit A for further details.

### Is this a hosted relationship?

TSANet defines two terms; Host and Participant. Will this be a one-to-many, one to one or many to many relationship? If you wish to have a many to many relationship meaning all participants can engage and collaborate with each other, all participants will need to be Basic or Premium members. If it is a hosted relationship where the partner has a relationship "only" with the host, you can take advantage of the Limited Member program allowing non-members or other Limited Members to join at a very low annual member cost. Any Basic and/or Premium member can join your hosted group at no charge. The verbiage crafted in Exhibit A will define this fundamental element of the relationship at the beginning of the document.



# TSANet Custom Groups

Do you want to define the following support elements?

Hours of Operation or require 24/7 coverage

Global coverage requirements

Expected Response and/or resolution times

Do you want to require a specific experience level of engagement?

Many advanced relationships are created to provide cooperative support beyond the traditional and/or classic support mechanisms. Do you want to specify the technician's experience level or a specific tier of support (e.g. Tier II or Engineering) as part of the relationship? Many higher-level relationships can specify named callers. TSANet can accommodate that need if necessary.

Should the process engagement process fail, how defined do you want the escalation process to be?

Many members will require a specific level of escalation (e.g. duty manager or management). This can be further defined in the Requirements for Participation and Information needed areas of the Addendum.

# TSANet Custom Groups

## Adding Members into your Custom Group

---

### Adding Non-Members

If this is a hosted relationship, TSANet can create a Landing Page ([xxx.tsanet.org](http://xxx.tsanet.org)) allowing you to guide non-TSANet members through the joining process. A sample of the Landing page was given earlier in this document. This would be customized to your program (including your logo and a front page) guiding your participants through the entire process via an automated method. This includes:

- Becoming a TSANet Member and accepting your Relationship Addendum
- Adding a process for engagement for your support staff
- Paying annual member dues
- Receiving notification of the new member into your group

The partner program portal also sends the new member Business Manger login credentials and a group encrypted URL guiding them to your engagement process.

### Adding Existing Members into your custom group

As any existing TSANet member (at any level) has already agreed to other TSANet documents including the Code of Conduct, and is loaded into the TSANet system, the process for existing members is different. These participants SHOULD NOT join through your support portal landing page. You should notify TSANet staff of existing members and we jointly will on-board them into your custom group. As existing members have already agreed to the Database and License Agreement and the Code of Conduct, your Relationship Addendum can be electronically posted for acceptance in the TSANet database. Members are then contacted by TSANet and guided through creating a separate engagement process if their existing process is not sufficient for your relationship.

### Suspension, disqualification or termination requirements?

Most hosted group relationships give the right to suspend and/or terminate another member to the host or more specifically to the designated TSANet Business Manager. You can be as detailed as you like about this section but keep in mind that only TSANet can suspend or terminate a member's from the organization. You can retain the right to terminate a member from your relationship but not the overall organization.

Whether it's a one-to-one relationship with an existing TSANet member or a hosted group with hundreds of members, TSANet is here to assist you in your relationship needs. As a Basic or Premium Member, this is another benefit of membership in TSANet. To take advantage of this process, give us a call to get started. +1 913 345 9311 or email [membership@tsanet.org](mailto:membership@tsanet.org)

# TSANet Custom Groups

## Baseline Addendum for Custom Groups

---

### EXHIBIT A

#### Addendum to the TSANet Code of Conduct

##### *(XXXXX Custom Group Relationship)*

This is a Custom Group Relationship established by XXXXX Corporation having its principal place of business is at XXXXXXXXXXXXXXXX (“XXXXX”) for the purpose of support collaboration and escalation between the group participant(s) and XXXXX. The Host of this custom group relationship is XXXXX (the “**Host**”).

*The above section edited to describe who is hosting the relationship.*

#### General

Members identify each of such member’s company sites (each a “**Company Site**”) in connection with membership in TSANet, Inc. (“**TSANet**”). This TSANet relationship addendum (this “**Addendum**”) applies to conduct of a member and each of its representatives at each such site, and at other locations where the member makes or receives calls for support or engages in membership activities in furtherance of this Custom Group Relationship (this “**Relationship**”). This Relationship within TSANet allows for a clearly defined support process whereby a Mutual Customer (as defined below) has been identified and a multi-vendor problem exists that is supported by this Relationship.

This is a one-to-many relationship where XXXXX has a relationship with all participants but each participant only has a relationship with XXXXX and no participant other than XXXXX has a relationship with the other participants. TSANet members who agree to interact in this relationship group to further this Relationship are together known as participants (“**Participants**”), except as stated otherwise. Participants, including the Host, XXXXX, are to utilize this relationship for collaboration and escalation between XXXXX and Participant(s) only. Participants of this relationship are Affiliated Members as defined by the TSANet Bylaws. By signifying their acceptance below, members in TSANet, Inc. (“**TSANet**”) agree that the additional terms of this Addendum are applicable to them in this Relationship, and that these additional terms supplement the TSANet Code of Conduct (the “**Code of Conduct**”).

*The above section edited to describe who One-to-One, One-to-Many, Many-to-Many*

Each member shall assure that each of member’s representatives participating in TSANet calls or member activities for such member shall first have been trained in TSANet processes and procedures applicable to the relationship in which they are participating (each a “**Designated Caller**”). Each Designated Caller shall only conduct themselves in compliance

# TSANet Custom Groups

with the TSANet Code of Conduct (the “**Code of Conduct**”), this Addendum, all TSANet applicable processes and procedures, as well as TSANet policy when participating in this relationship.

Participation in this relationship may be implemented by a member in all TSANet regions. Each member’s activities in TSANet shall conform to the Code of Conduct and each member is solely responsible for complying with laws applicable to their business activities. The Code of Conduct contains terms and conditions, policies and processes that each member is required to adhere to for entry into and participation in a TSANet relationship. In the event of any conflicts or inconsistencies between the Code of Conduct and this Addendum, the terms of this Addendum shall take precedence as between members in this relationship; provided, however, that this Addendum is not intended to modify or alter Section 5 (“**Competition**”), Section 7 (**Confidentiality**) and Section 7.4 (“**Limitation of Liability**”) of the Code of Conduct, nor Section 7 (“Limitation of Liability”) in the TSANet Database License and Member Acceptance Agreement, as may be periodically revised or updated.

## **Requirements for Participation:**

Participants are obligated to respond to other participants under the terms of this agreement where the Mutual Customer has been identified and defined in the TSANet database. Participants agree to have an internal process to identify and engage technicians capable of diagnosing or troubleshooting incidents. Participants further agree that when a service request is initiated and the product has been identified as part of this relationship, Participants will collaborate within the defined response guidelines.

Participants agree to diagnose and troubleshoot Mutual Customer, multi-vendor problems to isolation and/or resolution with other Participants in accordance with the Mutual Customer’s obligations with the Participant(s) as defined in the TSANet Database or relationship terms.

*The above section edited to define specifics of the relationship (e.g. Mutual Customer definition or No Mutual Customer*

## **Term**

This Addendum is effective immediately upon adoption by TSANet, may be periodically updated, and will automatically be renewed on an annual basis unless otherwise specified. Participants will be notified of any changes to this Addendum as defined by the TSANet Bylaws. Participants may terminate their participation in this Group Relationship with 90 days prior written notice to the President of TSANet.

*The above section edited to define the Term.*

## **Certified Platforms**

# TSANet Custom Groups

One Participant's certified platform does not necessarily constitute a certified platform that will be supported by all Participants. Where support obligations (i.e. Mutual Customer) exist from Participant(s) to customer, Participant agrees to engage other Participant(s) utilizing reasonable efforts and general troubleshooting to isolate and/or resolve a customer configuration regardless of whether there is a mutually agreed upon configuration or certified platform. This Addendum does not obligate Participants to continue engagement beyond initial troubleshooting on non-mutually agreed upon certified platforms. If after initial evaluation a Participant determines resources beyond initial troubleshooting are required and disengages on a non-mutually agreed upon certified platform(s), the Participant disengaging agrees to inform the Mutual Customer of the disengagement.

Participants are encouraged to post or link to information concerning certified platforms in the TSANet database. Participants are responsible for supporting the customer based on their independent and direct support contract with the customer in question.

Participants should never imply in sales or support literature that membership in this relationship obligates a Participant to engage resources beyond general troubleshooting to isolation and/or resolution where a mutually agreed upon configuration has not been agreed upon by all parties involved.

*The above section typically inserted to define interoperability issues with individual company HCL*

## Response Time Priority

Participants agree to strive to respond via telephone or electronic correspondence to other Participants with Mutual Customer, multivendor problems based on the following Priority Definitions:

**P-1 Critical** (System Critical, Down, Loss of main functionality) A catastrophic problem that may severely impact the Mutual Customer's ability to conduct business. This may mean that the Mutual Customer's systems and/or product are down or not functioning and no procedural workaround exists.

For **P-1** issues - Participants will strive to respond to each other within **the next business day** from the time of the initial call. Response is defined as a technician beginning the diagnostic process via telephone or electronic correspondence.

**For all other issues** - Participants will strive to respond within their best effort guidelines. Response is defined as a technician beginning the diagnostic process via telephone or electronic correspondence.

*The above section edited to define SLOs if necessary*

## Escalation

Members agree to define a process to escalate calls to the appropriate management level capable of authorizing the required resources to diagnose, troubleshoot, isolate and/or resolve complex problems within the appropriate time for the severity level.

# TSANet Custom Groups

*The above section edited to define if an escalation path is required*

## **Transfer of Incident**

Members agree to transfer incidents between participants of this Basic Relationship and a Participant where both parties mutually agree that the call should be transferred. The Participant accepting the responsibility will accept a direct customer transfer from the Member of the Group or be responsible for informing the Mutual Customer in a reasonable and timely manner that ownership has been transferred. All Participants shall make reasonable efforts to ensure a smooth transition and ensure Participants and the Mutual Customer are aware of the status of the call.

*The above section edited to describe warm transfer process and procedures*

## **Products Supported and Notification of Discontinued Products**

Participants in this relationship will collaborate to support a Mutual Customer for defined product offerings (which may in fact include all products sold and supported by a Participant) or by providing support based on a customer's contractual relationship with the Participant.

When a Participant decides to make a significant change to their cooperative support entitlement instructions they agree to provide 45 days written notification to the Member's Authorized Representative who has been designated a business manager (the "**Business Manager**") for this relationship, Such changes will include, but not be limited to, withdrawal of products currently supported where such products are still actively being sold and supported by the Participant outside this relationship or a change in the level of contract required by the end user to be supported under this relationship.

*The above section edited to define the product set(s).*

## **Information Required**

Participants agree to supply TSANet the following information and keep information up-to-date for the purposes of this relationship. Participants agree to verify and/or update information every ninety (90) days. Participant information will be available via the TSANet database only to other Participants of this relationship. Required information must be provided for each TSANet site participating in the agreement. Each participating support organization agrees to supply contact process instructions or access number(s) used for collaboration including products covered, hours of support under this relationship and Participant's criteria and verification of a Mutual Customer. Additionally, escalation information is required for each participating support organization identified.

*The above section edited to define what information should be posted in the TSANet database*

# TSANet Custom Groups

## Disqualification or Discipline

A Participant's non-compliance with this Addendum or the member's duties and responsibilities applicable to this Relationship may result in termination, suspension or disqualification from this relationship by the Host or by TSANet. Participant(s) may terminate their participation from this relationship with 30 days' notice. Notice should be made to the President of TSANet and the designated XXXXX TSANet Business Manager.

*The above section edited to define disqualification, suspension or termination. Typical in custom groups, the host has authority to terminate members. TSANet's responsibility is to its members and disqualification in this relationship will not terminate other relationships.*

## Member Acceptance of Addendum

By signifying acceptance, Member agrees to be bound to the terms of this Agreement, intends to submit this Addendum to TSANet, and agrees to the terms of participation in the TSANet organization respecting membership in this Basic Relationship as such terms are specified in this Agreement.

<ACCEPT> \_\_\_\_\_

By signifying that the Member declines below, the membership process in the Mission Critical Relationship will not continue.

<DECLINE> \_\_\_\_\_

For More information Contact US at +1 913 345 9311 or visit the web at [www.tsanet.org](http://www.tsanet.org)