TSANET

Your Technology is Connected. Are you?

Custom Groups eBook

V3 April 2016

TSANet Custom Groups

Contents

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.

Basic and Premium 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 for Basic and Premium members. 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 collabo**rate 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.

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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.

One-to-Many

One-to-One

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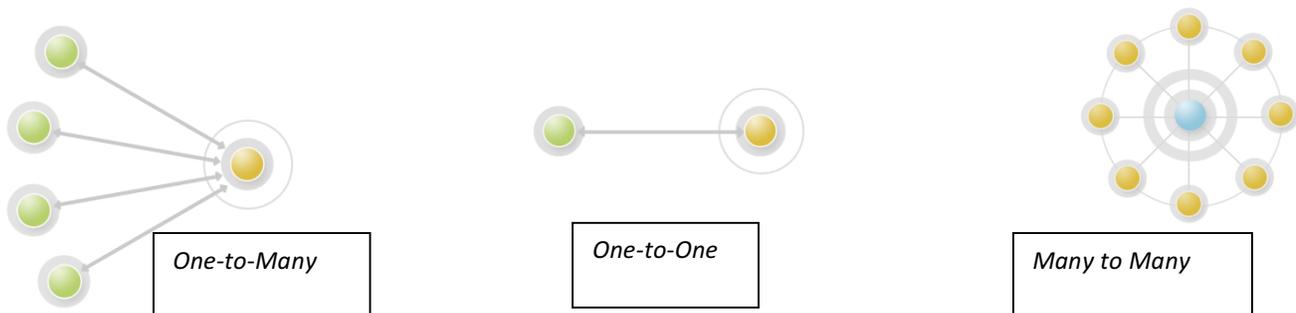
Should a member need to identify separate support elements for each individual partner, a Custom Group can be created for each individual partner. Where this may be necessary for specific situations, most relationships can be established with a common set of support elements. The processes a member will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

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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 co-branded landing page to enable members to easily join the custom group
- A customized microsite that includes features such as knowledge and training exchange

EMC TechConnect

Member Help

EMC² Technology Connect

EMC Business Partner Program for Technology Connect

- **New** TSANet members may view a short **video** on the joining process
- **Existing** TSANet members should **contact TSANet** direct at +1 913 345 9311

The EMC Technology Connect (Tech Connect) community on TSANet.org facilitates global collaboration among EMC and Tech Connect Partner support organizations to address mutual customer problems. Availability and response time depends on the mutual customer's entitlement. By registering below, you will be joining TSANet as a Limited Member, pending completion of your company's execution of the Tech Connect Partner Master Agreement and processing of the Tech Connect annual program fee. Incompletion of the Agreement and the program fee will void your Limited Membership status.

The EMC Tech Connect/TSANet support portal provides the framework for engagement in multi-vendor support interactions surrounding EMC products and your company's products. Note that only up-to-date validations with the EMC product lines approved by Tech Connect for testing with your company's specific products are supported in this portal. For support issues that do not involve EMC products that were approved by Tech Connect, your support organization should continue to rely on other support processes. Non-EMC Tech Connect approved product issues are considered outside of the scope of this EMC Tech Connect /TSANet support 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 for your company, along with products supported, and entitlement instructions. Email your user-id and password to techconnect@emc.com.

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.

If you are an existing TSANet member or require assistance with any aspect of the joining process, please contact TSANet at +1 913 345 9311. If you prefer to set-up a short call regarding the on-boarding process, email Send an email to dennis@tsanet.org

Helpful Links

Registration How To Video

TSANet Overview

[Existing TSANet Member?] [Continue >]

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BLOG

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.

Case Study # 4

Problem – Vendor A has a Channel Partner program that allows Channel partners the ability to provide support. A relationship needs to be established to ensure that both partner and vendor have a mechanism for collaboration. Vendor A also shares special training and knowledge with these authorized support partners.

Solution – A one-to many relationship 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 microsite is created that provides the ability to collaborate with the partners and share training and knowledge materials.

Case Study # 5

Problem – A group of Vendors have a solution that is sold to the market. They would like to create an authorized support channel partner program to support the combined solution. The channel partners need access to each vendor and knowledge and training related to the combined solution.

Solution – This custom group is setup that allows each of the Vendors to collaborate while at the same time allows each of the Channel Partners to collaborate with one or more of the vendors. A microsite is created that provides the ability to collaborate with the partners and share training and knowledge materials.

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.

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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.

What marketing materials are needed to support the custom group?

TSANet works with the member to define the marketing plan and content needed for the group. This can include the following:

- ✓ Co-branded landing page
- ✓ Co-branded Marketing Brochure
- ✓ Presentation / webinar that explains the group and features of the Microsite

What features are needed for the Microsite?

All Custom groups come with a microsite that can be customized for the member. Some features of the microsite include:

- ✓ Knowledge and Training exchange (or other pages)
- ✓ Integration options to a member's content and systems (RSS Feeds or iFrames)
- ✓ Customize and co-brand the homepage
- ✓ Case exchange integration

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) 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.

Note: TSANet provides options to allow a host to pay for non-members to join. Contact TSANet for further details.

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

TSANet Custom Groups

Baseline Addendum for Custom Groups

EXIBIT 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 XXXXXXXXXXXXXXX ("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

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

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 Participate 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.

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

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