

Guided Success Program

Our purpose is to ensure that our customers succeed. We do this by putting client success at the forefront of everything we do. Through years of industry-specific experience and thousands of client engagements, we bring best practices to bear to maximize the success rate of your product development process. We are dedicated to helping you achieve your business goals with Jama Connect®.

SUCCESS SERVICES CATALOG

The catalog contains a variety of solutions that enable your team to achieve your business outcomes using Jama Connect®. The types of offerings available in the [catalog](#) include:

OFFERING	DEFINITION
Training Resources	Recorded expert tutorials that give you the flexibility to learn at your own pace and on your own schedule. Live, public webinars that review leading practices and insights with industry experts. Also includes recurring live Jama Connect training sessions.
Benchmark Assessments	Data-driven diagnostics and assessments to help your team understand your maturity in system engineering and requirements management frameworks, including recommendations to improve.
Consulting	Personalized, expert consulting offerings are structured around specific business outcomes such as compliance, increasing quality, and improving process efficiency.
Technical Services	Technical services are available such as integration hub setup, custom document exports, or API training. For example, our developers can work with your team to create a custom-tailored document export that fits your specific branding, formatting, and logic.

The Guided Success Program Contains:

- Unlimited access to online training resources
- Up to 12 Benchmark, Consulting, or Technical offerings per subscription period

Your Success Team will recommend specific offerings based on your team’s desired outcomes. This is what we refer to as the Success Path.

Full catalog of Solution Offerings can be found at www.jamasoftware.com/success

Example Path to Onboard Jama Connect

- **Kickoff**
 - Introductions to your Jama CSM and Consultant
 - Benchmark current process maturity and needs
- **Implement**
 - Tailor Jama Connect framework to your org workflows
 - Consulting offerings e.g. configuration, review workflow, test management
 - Technical services e.g. integrations, custom exports
 - Personalized and private end-user training
- **Measure**
 - Monthly traceability compliance reporting
 - Requirement Quality Audits
- **Optimize**
 - Optimization working session(s) with consultant
 - Monthly public trainings for new users
 - Scale to new teams/use cases

Customer Success Team

The Guided Success Program includes a team dedicated to your success through proactive guidance using data-driven insights and best practices to maximize value and achieve desired business outcomes.

Customer Success Manager (CSM) - INCLUDED

The CSM team offers customers engagement through onboarding, account monitoring, and usage guidance. Throughout the year, the CSM team will offer you proactive advice — focused on your program's overall health — delivered through personalized outreach.

Includes:

- Access to a named Customer Success Manager
- Yearly Renewal Discussion
- Digital Engagement
- Ad-Hoc Discussions

Jama Solutions Consultant - INCLUDED

The Consultant is responsible for providing mentorship to help our new and existing customers achieve sustained value from Jama Connect, while keeping them happy and satisfied through your engagement with us.

- Access to a named Consultant
- Primary contact to deliver your success services
- Responsible for understanding your desired process and recommending the most relevant digital assets (tutorials / guides) and consulting offerings from the Guided Success Services catalog to achieve your desired outcomes
- Functional experience in requirements management & test management processes

Your consultant will recommend a tailored path from the **Success Services Catalog - (up to 12 offerings)** to ensure adoption and success.



Customer Success Management

The Guided Success Program includes a team dedicated to your success through proactive guidance using data-driven insights and best practices to maximize value and achieve desired business outcomes.

Onboarding - INCLUDED

All new customers will participate in the onboarding process to ensure that you understand how to work with us. Onboarding ensures that the Jama Software® team has identified, understood, and documented your problem statement, desired business outcomes, requirements, timeline, and success criteria.

Benefits:

- You will gain an understanding of where to find the variety of resources available as you design, develop, and deploy your solution(s).
- You will have a training path and/or applicable success path template to help you achieve your desired outcomes.
- Your Success team will confirm your goals and recommend solutions to optimize workflows and processes that quickly bring you value.

Program Monitoring - INCLUDED

Our Customer Success Management team has access to tools and data to monitor your programs' performance. Customers will also receive additional proactive and personalized recommendations for improvement.

Benefits:

As product usage and utilization of Jama Software's success services are monitored, the Customer Success Management team will be able to use data-driven insights to offer best practices and resource recommendations to ensure you achieve your desired business outcomes.

Success Planning - INCLUDED

Benefits:

Through frequent and personalized engagements, our Customer Success Management team will be able to obtain a higher level of understanding of your business needs and be able to make additional recommendations on next steps and services that will help you achieve your organization's desired goals.

Executive Business Review (EBR) - INCLUDED

The Executive Business Review is an opportunity for the Customer Success Management team and your key contacts to review your current journey status and to work together to create a strategic plan for the year ahead.

Benefits:

The Executive Business Review allows both parties to align on your desired business outcomes enabling Jama Software to continue to support your work in achieving those goals with ongoing best practice recommendations as well as advisory, training, and support services.



Enterprise Technical Support

Software Services

Software Updates & Maintenance Releases - INCLUDED

Jama Software regularly updates the software, its backend, and its supporting infrastructure — and makes these updates available to its customers.

Software Services

Technical Support - INCLUDED

Customer's Designated Support Contacts may submit support requests to Jama Software via the Approved Ticket Submittal Method. Once a support request has been received, the Technical Support Engineer handling the ticket will acknowledge receipt and respond within the Response Time related to the Priority selected when the ticket was opened.

Accessed via:

- Online Ticket Submission
- Chat

Availability

These are the standard business hours during which Jama Software Support services are provided. When a Support Request is opened after Regular Support Hours or during those designated US Holidays, the Technical Support Engineer will contact the customer during the next business day.

- Support Hours: Sunday 10:00PM - Friday 6:00PM PST

Language

This is the language in which the Jama Software Technical Support Engineers will respond to a support request

- English

Named Support Contact

Named Support Contacts are Users who are key personnel identified by Customer to serve as primary liaisons between Customer and Jama Software Engineers for technical support. The Customer shall notify Jama Software whenever Named Support Contact responsibilities are transferred from one individual to another.

- Includes four (4) Named Support Contacts

Response Time

- A Jama Technical Support Engineer will respond to a support request from a Designated Support Contact, provided it is submitted according to Approved Submittal Methods. Response time is associated with issue Severity (set by the Designated Support Contact submitting the ticket). Response time is measured when the ticket is submitted via the CRM system. For severity definitions and response times, please visit <https://support.jamasoftware.com/>

At Your Side Throughout Your Journey

Our Success Programs were designed to ensure your success with Jama Connect. With our Guided Success Program, we'll surround your team with deep industry and product expertise. We are here throughout your entire journey to help you maximize the value of your investment and achieve your business goals.

With the Guided Success Program, you can expect:

- ✓ Faster time-to-value
- ✓ To achieve desired business outcomes
- ✓ Increased added strategic value
- ✓ A simplified renewal process
- ✓ Optimized relationship
- ✓ Improved overall satisfaction



Still have questions?

If you're interested in learning more about Jama Connect or our Customer Success Programs, please visit:

www.jamasoftware.com/contact

For existing Jama Software customers, please reach out directly to your Customer Success Manager.



ABOUT JAMA SOFTWARE

Jama Software® is focused on maximizing innovation success in multidisciplinary engineering organizations. Numerous firsts for humanity in fields such as fuel cells, electrification, space, software-defined vehicles, surgical robotics, and more all rely on Jama Connect® requirements management software to minimize the risk of defects, rework, cost overruns, and recalls. Using Jama Connect, engineering organizations can now intelligently manage the development process by leveraging Live Traceability™ across best-of-breed tools to measurably improve outcomes. Our rapidly growing customer base spans the automotive, medical device, life sciences, semiconductor, aerospace & defense, industrial manufacturing, consumer electronics, financial services, and insurance industries. To learn more, visit us at:

www.jamasoftware.com