

2020

SAFETECH *Synergy*

Elevating **QHSE** with Industry Best **Technology!**
Presented by ITRAK

Wednesday May 27 4:00pm (MST)

*“Understanding New Support
Options from ITRAK 365”*



ISV Connect Premier Tier Partner

ITRAK
365



www.useitrak.com

Housekeeping Items

- Please mute yourselves
- If there aren't a lot of people, we'll take questions openly throughout the presentation
- Otherwise, feel free to ask question in the Chat panel or click the 'Raise hand' icon
- You can also join our Microsoft Teams Conference Channel and continue the conversation there (Ask Us How?)
 - Instructions: <https://itrak365.com/conference-schedule/>
- If you have question after the conference, see above or you can just email them to us via support@neosystems.com
- We can provide copies of the video and any presentation materials, just ask
- Check out our YouTube and LinkedIn pages as well
- Make sure to look at the Schedule for other sessions

INTRODUCTIONS

<https://itrak365.com/about-us/#the-team>



Tom Makarov
Customer Success Manager

- 1 Year with ITRAK !
- 18-year Software Industry veteran
- 5+ Years of CSM Experience
- Canada, US, UK, EMEA, AsiaPac
- PM, Implementation, System Admin, Consulting, Help Desk, and more...



Kassem Elrafih
Data & Reporting Specialist

- 1 Year with ITRAK !
- Power BI Specialist
- Support Desk
- BA Economics, Management and Society

Understanding New Support Options from ITRAK 365

“The purpose of this session is to discuss the depth and breadth of the service options available to new and existing customers under our New Support Program.

Not all customers have been made aware of the changes that we’ve implemented in 2019-2020. We’re constantly working to build and expand our cost-effective, efficient, and detailed offerings.

Support is just one of several arms of the ITRAK 365 Team. We work in conjunction with Development, Consulting/Professional Services, Customer Success Management, and Marketing to bring assistance and education to our customers.”

Agenda

- What does Support at ITRAK 365 do?
- Support Versions/Tiers
- What are these tiers? How are they different?
- Comparison

- What are the biggest BENEFITS of each?
- How do I derive value from these offerings?
- Deciphering the Support Product Offering Matrix?
- How are Legacy Customers affected by these?
- What are we adding in 2021?
- Q&A

What does Support @ ITRAK 365 do?

- Support is often the main interface between the Customer and ITRAK
- The answer to the question of:

Who do I email if I don't know who to talk to?

support@neosystems.com
support@itrak365.com

- This has been an exercise of:
 - Standardization
 - Simplification
 - Expansion of service
 - Process for future developments



Some Highlights

- Total Cases in 2019: **Over 1000+ cases**
- Total Cases in 2020: **450 Already!**

- Intake, Triage, Routing & Distribution, and Follow-up
- Fixes Tier 1 issues
 - Access/Security
 - User Issues
 - Minor Dynamics/ITRAK setup
 - How-To's
 - Training
 - Documentation
- Fix some Tier 2 issues and Distributes others & Tier 3

- Liaises with Consulting/Professional Services/Development/CSM and back to the Customer

Continued...

- Lots of Education!
- Webinars: <https://itrak365.com/webinars/>
 - Free Live Weekly Sessions since January 2020
 - Over 20 now!
 - Various topics: User Management, Power BI, Microsoft UCI Changes, Document Library Creation, Mobile & Portal Navigation, Procedures & Competencies, COVID-19 Community Edition, and more...
- Building a Documentation Library (beta)
 - <https://itrak365.com/documentation>
 - Create new docs, refine old ones, looking at interactive online docs (Documentor)
- Support Team assembles Learnings, FAQs, Defects, Feature Requests...and turns these things into actionable items.
 - Creates a feedback loop and a Community!

Support Versions

****Legacy***

Standard

Premium

Premium Plus

Support Versions

****Legacy***

Pre-existing agreements for older customers or custom arrangements due to specific version or contract conditions

Standard

Complimentary Tier available to all customers with a current ITRAK 365 agreement/subscription

Premium


**Optional Tier. Includes everything in Standard PLUS Additional Services.
+Cost**

Premium Plus

AS COMPLETE AS IT GETS!

**Optional Tier. Includes everything in Premium PLUS Additional Services.
+Cost**

Comparison - Hours

STANDARD	PREMIUM	PREMIUM PLUS
9am-3pm MST (Monday-Friday)	8am-5pm MST (Monday-Friday)	24 x 7 
	<i>Longer Hours</i>	<i>Global Coverage!</i>

Comparison – Support Level Agreement (SLA)

STANDARD	PREMIUM	PREMIUM PLUS
Best-Effort Only	<p>HIGH 1hr initial response / 1 day resolution</p> <p>MED 4 hr initial response / 2 day resolution</p> <p>LOW 2 day initial response / 10 day resolution</p>	<p>HIGH 1hr initial response / 0.5 day resolution</p> <p>MED 2 hr initial response / 1 day resolution</p> <p>LOW 1 day initial response / 5 day resolution</p>
No SLAs	Guaranteed SLAs	Fastest Case Response Possible!

Comparison – Contact Methods

STANDARD	PREMIUM	PREMIUM PLUS
Email & Customer Portal Only	ALL CHANNELS (Email, Portal, Phone)	ALL CHANNELS+ (Email, Portal, Phone, Mobile, Chat, & Virtual Agent?)
	<i>Easier to Get in Touch</i>	<i>Perfect for Almost Every Type of Need!</i>
support@neosystems.com	premiumsupport@neosystems.com	CustomerNameSupport@neosystems.com

Comparison – Case Escalation

STANDARD	PREMIUM	PREMIUM PLUS
No Escalation Manager	Escalation Manager	Escalation Manager & Department Manager
	<i>Extra Touchpoint</i>	<i>Always be in the loop on your cases!</i>

Comparison – Documentation

STANDARD	PREMIUM	PREMIUM PLUS
Free Documentation Library	Free Documentation Library	Free Documentation Library
<i>No Customization</i>	<i>Some Customization</i>	+ <i>Custom Documentation!</i>

<https://itrak365.com/documentation/>

Comparison – Training

STANDARD	PREMIUM	PREMIUM PLUS
Standard User & Admin Training	Custom User & Admin Training	Custom User & Admin Training PLUS Classroom Training
<i>Help for All!</i>	<i>Modified to your processes</i>	<i>Make it fit all YOUR needs</i>

Comparison – Costs

STANDARD	PREMIUM	PREMIUM PLUS
INCLUDED*	\$1000/month	\$2500/month
<i>Some ITRAK Customers are not eligible for Standard Support (i.e. Legacy)</i>		

Notes/Comments/Exclusions

- Applies to ITRAK 365, On-Premise, and Hosted Customers
- Excludes all ITRAK Version 3 (iTrak 3) Customers
- Some customers may also be excluded due to unsupported versions of Dynamics/ITRAK combinations
 - These customers may need to have Custom/Legacy agreements in place instead
 - Different costing would apply depending on complexity
- Does require *some* older customers to sign our New Support Agreement
 - Ideally all should be completed in 2020 but exceptions may apply
 - Doing so in conjunction with Cloud Migrations, contract renewals, etc.
- Customers without an agreement in place continue paying their Professional Service rate for Support services
 - ***Missing out on cost-savings and value-added services!***

Who does Premium and Premium Plus benefit?

PREMIUM

- Customers who already spend approx. **\$10K p.a.** on Support services. *Premium could yield savings!*
- Customers that have too much variability in spending and want a more consistent spend
- Customers with many locations and/or many people interacting with ITRAK
- Customers with high-volume and urgent case response requirements
- Customers that are currently not utilizing or underutilizing the most easily assessable elements of Support (i.e. Training, Documentation, etc.)
- Customers with advanced variations in their setup, thus requiring more Tier 2 assistance
- Customers with advanced technical and reporting needs

PREMIUM PLUS

- Customers who already spend approx. **\$25K p.a.** on Support services.
- Customers that have too much variability in spending and want a more consistent spend
- **International or Geographically dispersed Customers or those with 24/7 (3 Shift) Operations**
- Customers with the highest volume and/or urgent case response requirements
- Customers that want to utilize **every aspect** of the ITRAK offerings (i.e. Custom Training & Documentation, Special Assistance, Technical Guidance, Auditing Help, Tier 3 needs, Development, etc.)
- Customers with the highest reporting needs

Examples of Underutilized Gems

PREMIUM	PREMIUM PLUS
<ul style="list-style-type: none">• Basic Cost Savings• Longer Support Hours and More Flexibility in Case Handling• Case Escalation• Forms Troubleshooting without going to P.S.• More Flexible Training• More Useful Documentation• Some assistance with Dynamics (Advanced Find, Reporting Wizards, Custom Views)• Early Product Releases• More flexibility in free ITRAK upgrades	<ul style="list-style-type: none">• Basic Cost Savings• 24/7• Maximum Coverage and Escalation!• Fastest response times possible under the current scheme• Maximum Forms Troubleshooting without going to P.S.• Help with Microsoft, Azure, Servers, Network setup & troubleshooting (Tier 3)*• New User Onboarding Training Packages*• Dynamics and ITRAK setup*• Development of standard Dynamics solutions (Microsoft AppSource) <p data-bbox="1505 1033 1843 1066"><i>*Some limitations apply</i></p>

Service Offerings Listing (aka Support Matrix)

	A	B	C	D	E	F
1	Service	Standard	Premium	Premium Plus	Professional Services	Notes/Exceptions
2	Support Cases					
3	Basic Case Triage (Tier 1)	x	x	x		
4	Email Case Submission	x	x	x		
5	Portal Case Submission	x	x	x		
6	Phone Case Submissions		x	x		
7	User Setup Assistance	x	x	x		Cloud Only
8	User Troubleshooting	x	x	x		Cloud Only
9	Tier 2 Troubleshooting		x	x		Typically Configuration
10	Tier 3 Troubleshooting			x		Typically Technical Assistance (Microsoft, Azure, Servers, etc.)
11	Dedicated Support Email		x	x		
12	Escalation Manager		x	x		
13	Multi-level Escalations			x		
14	Customer Support Portal Assistance	x	x	x		Not the ITRAK Portal. Usage documentation or guidance provided
15	Monthly Support Stats Report (Basic)		x	x		Excel
16	Real-time Support Stats Dashboard			x		
17	Remote Support	x	x	x		
18	Partner Support Desk		x	x		
19						
20	Training					
21	Basic User Training	x	x	x		Mobile/Portal. Onboarding of users is separate
22	Basic Administrator Training	x	x	x		
23	Specified User Training		x	x		Forms only
24	Specified Administrator Training		x	x		Guidance provided on most relevant tables. Forms Building not included.
25	Training Program Development				x	
26	Reporting Training	x*	x*	x		*Select reports only (standard canned reports and new releases)
27	Standard Onboarding Packages			x*	x	For ongoing New Hires. *Limits apply

High Value/Low Utilization

- *Basically this is what we think everyone should use because it's already included for ALL (Standard, Premium, and Premium Plus)*
 - Our Webinars!
 - Submitting Defect finds (the faster we can QA & fix them)
 - Submitting Product Requests (so we know what kind of things people want)
 - Use our Customer Portal (can see your own past cases)
 - Ask for Basic User or Basic Admin Training (Portal or App)
 - Ask for How-To Guides
 - Read our Monthly Support Newsletters
 - Follow our social media (especially LinkedIn and YouTube) for extra content
 - Ask for a Licensing Assessment
 - Health Monitoring (Cloud-only). This is stats on Form Creation, Submission, etc.
 - Azure Performance Management (Cloud-only)
 - Power BI Dashboards
 - Sandbox
 - Version Upgrades*

Power BI @ The ITRAK Support Team

- Power BI is an ever-growing part of what we do in Support
- New Reports
- New Dashboards
- Custom pre-built Dashboard packages that we help configure
- Troubleshooting
- KPIs (internal)
- 3rd Party Data Integrations (Data Pools)
- Training
- Webinars



The Future of Support

ALREADY COMMITTED TO THIS YEAR!

- Case Submission Power BI Dashboard for Premium customers (currently only done for Premium Plus)
- Enhanced Power BI Standard Report/Dashboard Package
- Improved Release Notes
- Improved Documentation
- More How-To Videos

LIKELY TO BE SEEN NEXT YEAR (2021)

- Community Forum
- Data Mining/Statistics
- Real-time industry monitoring/trends analysis

DEBATING

- Extending Support Phone # for all tiers?
- Chat window and/or WhatsApp channel?
- Microsoft Teams Group (debate channel or case submission)?
- Virtual Agent (with Microsoft AI)?
- How many versions we're willing to upgrade for free?
- Real-time performance management dashboard for customers (Cloud-only)?
- Exposing KPIs to customers?

2020

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Questions?

support@neosystems.com

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