

# Allocadia Assist

Delivering long-term customer value is in our DNA.

You're on a mission. We'll help you get there.

Since our founding, we've made it a core strategic priority to deliver outstanding customer experiences through an unmatched depth of people and expertise. Why? Because we know what it takes to succeed at marketing performance management. This challenge is our birthplace.

Allocadia Assist is a personalized, continuous enablement program designed to help you get maximum value out of your Allocadia investment. We tailor Allocadia Assist to your unique needs, training and equipping you and your team to leverage everything Allocadia has to offer where and when you're ready for it.

## Allocadia Assist Services

- New Feature Enablement
- Re-training
- Budget Rollover
- Analytics Updates
- Bi-annual Business Review
- Priority Technical Support
- System Maintenance
- Configuration Review
- Named CSM

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“Our team's job is to ensure that our solution is made to suit your business and to fully enable your users to get the most out of it. That's how you'll get maximum value from your purchase of Allocadia.”

— T.J. Begley  
VP Professional Services & Support



## Service Details

### New Feature Enablement

We release updates to the Allocadia platform every six weeks, but you might choose to put them to work at a later date. When you're ready, we'll make sure the new capabilities are properly configured, and we'll get your team fully trained on how to use them.

### Analytics Updates

Changes to internal and external business conditions are inevitable. When big ones come around, your strategy and the results you're driving can change too. We will help you maintain your analytics dashboards so that you're always getting the marketing performance insights you need most. This includes updates to account for new attributes and new metrics tracked in Allocadia.

### System Maintenance

Like oil changes for your (non-hybrid) car, regular system maintenance is crucial to ensure smooth workflow and accurate data. We conduct regular audits of your system to ensure full compliance with your working environment, including review, maintenance, and modifications of existing configurations and integrations. So, for example, if Finance springs a change to General Ledger codes on you, we'll make sure your data integrity in Allocadia remains unaffected.

### Re-training

They say prevention is the best medicine, and we agree. That's why we're committed to making sure your team is always properly trained on how to use Allocadia. This includes training for new team members, and periodic re-training for existing members who just need a refresher.

### Bi-annual Business Review

Twice a year we'll arrange an in-depth business review to make sure that your Allocadia platform is fully supporting your team's goals and objectives. We'll identify opportunities to deliver more value and work out a practical plan to get you there.

### Configuration Review

Usually part of the second annual business review, we'll look closely at how your Allocadia platform is configured to make sure it's doing exactly what you need. This typically occurs - and is particularly important - before your fiscal rollover and before you launch into a new planning phase, to confirm that the system will handle data the way you want it to.

## Budget Rollover

It's nowhere near as complicated as what Finance has to do at year-end, but getting ready for the next fiscal year is a vital step in the planning cycle. We'll make sure your budget hierarchy and configurations are transferred and adjusted to reflect any relevant changes to your business (within the pre-existing scope of your setup) so you'll be ready to get going with your new plans as quickly and with as little disruption as possible.

## Priority Technical Support

As an Allocadia Assist customer, you get priority service from our technical support team for non-critical bugs or issues. This includes extended hours of access to our technical support team. See the table below for details (differences in **bold**).

| Service Level                    | Metrics   | Priority 1 | Priority 2       | Priority 3      |
|----------------------------------|---|------------|------------------|-----------------|
| Standard<br>Technical<br>Support | Support Hours:<br>Mon-Fri 9AM—4:30PM PT                 |            |                  |                 |
|                                  | Response Time   | 1 hour     | 1 business day   | 5 business days |
|                                  | Commence Resolution Time<br>(after first response time) | 30 minutes | 4 business hours | 3 business days |
| Allocadia<br>Assist              | Support Hours:<br>Mon-Fri 8AM—8:00PM PT                 |            |                  |                 |
|                                  | Response Time   | 1 hour     | 4 business hours | 1 business day  |
|                                  | Commence Resolution Time<br>(after first response time) | 30 minutes | 2 business hours | 2 business days |



## The Allocadia Customer Experience Promise

We stand behind our software because we know you rely on it as the source of truth for measuring, understanding, and managing your marketing performance. As your business grows and evolves, we promise to keep your Allocadia platform up-to-date and relevant, and to keep your team fully empowered to derive maximum value. When you're successful, we'll know we've succeeded too.

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**“Allocadia worked with us through every step of the way and made sure we had what we needed. More than that, they have answered every question efficiently (and I have plenty) and are so kind.”**

– Erin Ashcraft  
The Learning House

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### **Allocadia Assist** Delivering Value At Every Step

[www.allocadia.com/customer-experience](http://www.allocadia.com/customer-experience)

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 **ALLOCADIA**<sup>SM</sup>