

# Strategic 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 the 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 Strategic Success Program Contains:

- Unlimited access to training resources
- Up to 24 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.

A full catalog of Solution Offerings can be found at: [www.jamasoftware.com/success](http://www.jamasoftware.com/success)



## Example Path to Onboard Jama Connect



## Customer Success Team

The Strategic 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 Customer Success Manager (CSM) 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:

- Named Senior Customer Success Manager
- Bi-weekly check-ins (as necessary)
- Digital Engagement
- Strategic Partnership Discussions

### Jama Connect Solutions Consultant - INCLUDED

The Consultant is responsible for providing mentorship to help you achieve sustained value from Jama Connect, while keeping you happy and satisfied throughout your engagement with us.

- Primary day-to-day contact to deliver your success services and coordinate experts across the Jama Software team.
- Responsible for understanding your desired process and recommending the most relevant digital assets (tutorials / guides) and consulting offerings from the Strategic 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 24 offerings)** and facilitate a bi-weekly technical check-ins to ensure adoption and success.

# Customer Success Management

The Strategic 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 objectives.

## 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.



# Customer Success Management - Continued

## Roadmap Planning - INCLUDED

Critical to any strategic relationship is the ability to help match both your short and long-term strategic growth goals with the technology capabilities of Jama Connect. With deep domain expertise and a full understanding of your strategic growth plans and desired business outcomes, Senior/Strategic Success Managers (SSM) ensure alignment with your business requirements and the technology required to satisfy those needs.

### Benefits:

By forging strong relationships between you and our product management teams, Strategic Success Managers are well positioned to facilitate the important discussions required to align both parties on the state of your business and the future of Jama Software technology. With deep business and use case knowledge, Senior/Strategic Success Managers advocate for you and help influence product roadmaps. Additionally, the SSMs will work with you on implementing current best practices with existing technology solutions.

## Jama Software Executive Sponsor Program - INCLUDED

Jama Software's Executive Sponsor will ensure tight collaboration across all parties internal and external to Jama Software. In collaboration with your SSM, Jama Software's Executive Sponsors are responsible for the overarching executive, program, and technical governance.

### Benefits:

Strategic Success Managers help identify the governance processes needed. Working to keep the multiple programs and processes governed, the SSM will safeguard the achievement of business objectives and enhance your return on investment (ROI).



# Premium Technical Support

\*We recommend bundling Premium Support with the Strategic Success Program. This is a separate package with additional cost.

## 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.

## Assisted Support Services

### Support Desk - 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 six (6) Named Support Contacts

#### Response Time

- A Jama Technical Support Engineer will respond to a support request from a Named Support Contact, provided it is submitted according to Approved Submittal Methods. Response time is associated with issue Severity (set by the Named 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/>

#### Technical Account Manager

Your designated Technical Account Manager is the single point of contact on urgent, non-urgent, and high-impact issues that may arise. They will:

- Provide direct insight into upcoming releases, as well as make you aware of upcoming training for the latest features.
- Manage and oversee support tickets and ensure proper escalation.
- Act as an advocate on your behalf inside Jama Software to prioritize defects and enhancement requests with high business impact for your organization.
- Manage internal communications across global teams within your organization, acting as the main point of contact for technical issues regarding Jama Connect.

## At Your Side Throughout Your Journey

Our Success Programs were designed to ensure your success with Jama Connect. With our Strategic 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 Customer  
Success Strategic Plan,  
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](http://www.jamasoftware.com/contact)

DATASHEET | [jamasoftware.com](http://jamasoftware.com)

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](http://www.jamasoftware.com)