



## Service Description Technical Support Account Manager and SaaS Service Management (Standard and Premium)

### OVERVIEW OF PTC'S SERVICE MANAGEMENT OFFERINGS

PTC recognizes that some customers may seek an enhanced service level engagement from PTC. For those customers, PTC offers premium services on an as-purchased basis.

These premium services are specifically designed based on how customers have implemented their PTC software (On-Premise or Software as a Service or "SaaS").

**TSAM:** For customers who purchase "on premise licenses" (meaning that PTC is not hosting the technology for the customer), such customers can purchase a Technical Support Account Manager (TSAM).

**SaaS Service Management:** For customers who purchase SaaS offerings (meaning that PTC hosts the technology for the customer), such customers can purchase Premium Service Management.

Please note that for SaaS customers, PTC includes a Standard service level at no cost. Under this model, PTC provides a defined set of deliverables. PTC's Premium Service Management that can be optionally purchased provides added deliverables and benefits as defined in Table 1 below.

In addition, included in PTC's Premium Service Management offer are enhancements in the frequency and methodology of the common deliverables that are included in both the Standard and Premium service offerings. Please reference these details in Table 2 below.

### HIGH LEVEL DESCRIPTION OF THE FEATURES OF EACH OFFERING

	On Prem	SaaS	
Table 1: Service Features	TSAM	Standard	Premium
<b>Customer Enablement:</b> Education of PTC tools and processes	✓	✓	✓
<b>Service Reviews:</b> Provide performance trends and analysis	✓	✓	✓
<b>Maintenance:</b> Planning and scheduling		✓	✓
<b>Upgrade Planning:</b> Drive strategy and scheduling with customers		✓	✓
<b>Root Cause Analysis for Significant Severity-0 Outages:</b> Review and communicate key findings and corrective actions of critical issues	✓	✓	✓
<b>Customer Intelligence Management:</b> Provide contextual awareness of customer roadmap, use cases, and priorities	✓	✓	✓
<b>Product Roadmap and Supportability:</b> Communicate on service strategy and roadmap, including critical announcements	✓	✓	✓
<b>Release Management:</b> Oversee and coordinate implementation of platform, software, and architecture changes		✓	✓

	On Prem	SaaS	
Table 1: Service Features	TSAM	Standard	Premium
<b>Client Advocacy:</b> Act as an advocate for customers to bring about service improvements within PTC ecosystem	✓		✓
<b>PTC Spokesperson:</b> Represent the interest of customers, relays important information to customers regarding PTC advancements and organizational initiatives	✓		✓
<b>Risk Mitigation:</b> Oversee customer-specific mitigation plans with PTC teams to ensure efficient and quality resolution	✓		✓
<b>Software Performance Report:</b> Prioritization and Coordination of PTC software fixes	✓		✓
<b>Environmental Consultancy:</b> Orchestrate activities to ensure system performance			✓
<b>Escalation Management:</b> Be a primary point of contact for significant operational issues, driving the execution of resolution plans for high-impact events	✓		✓
<b>Case Management:</b> Manage the prioritization of incidents and provide status reviews and trends	✓		✓
<b>Cost:</b> Service available as an additional purchase or included?	Add Purch	Incl w/ SaaS	Add Purch

## DESCRIPTION OF TSAM/PREMIUM SERVICE MANAGEMENT (ADDITIONAL PURCHASE)

The objective of the Premium Service Management and TSAM offerings is to leverage the breadth and depth of PTC's ecosystem to effectively meet the customer's needs. The Premium Service Manager/TSAM acts as an extension of PTC's team to work seamlessly within the organization to allow for effective prioritization of business requirements and to ensure important issues receive appropriate attention quickly and accurately. The Premium Service Manager/TSAM will proactively orchestrate activities on the customer's behalf to enhance their overall service experience.

Premium Service Managers/TSAMs will provide customers with detailed awareness and insights regarding PTC's service delivery objectives, strategy, and schedules, allowing the customer to efficiently plan resources, budgets, and timelines for their critical initiatives.

The Premium Service Management/TSAM service provides additional managerial oversight and contextual awareness of the customer's environment and requirements which will positively impact the avoidance of risk and increase effectiveness in issue resolution.

PTC Premium Service resources will provide customized and personalized reports regarding activity levels, trends, open issues, and resolutions, allowing the customer to gain a deeper understanding of their relationship with PTC and their service experience.

The Premium Service Managers/TSAMs will also represent the voice of the customer to the PTC ecosystem by advocating for their interests and needs ensuring their satisfaction.

Finally, in partnership with the customer, Premium Service Managers/TSAMs will work to understand the customer's strategy and roadmap and proactively plan for the customer's future success.

## DIFFERENCES BETWEEN THE STANDARD AND PREMIUM SERVICE MANAGEMENT OFFERINGS (SAAS)

The following table highlights the differences in methodology and frequency of delivery between the common set of deliverables that are applicable between the Standard and Premium service levels.

**Table 2:**

	Standard		Premium	
Task	Method	Frequency	Method	Frequency
Customer Enablement	Online, self-paced trainings	As Needed	In person or video conference	As Needed
Service Reviews	Video conference	Quarterly	In person or video conference	Monthly
Maintenance	E-Mail	As Needed	Video conference, E-Mail, or Phone Calls	As Needed
Upgrade Planning	Video conference	As Needed	In person or video conference	As Needed
Review and Communicate Root Cause Analysis	E-Mail	As Needed	Video conference or Phone Calls	As Needed
Customer Intelligence Management	E-Mail	Quarterly	Video conference, E-Mail, or Phone Calls	Weekly
Represents Product Roadmap and Supportability	E-Mail	Quarterly	In person or video conference	Monthly
Release Management	E-Mail	As Needed	In person or video conference	As Needed

The Service Level Target for customer inquiries will be:

- Standard = Service Manager response within 2 business days
- Premium = Service Manager response within 1 business day

## SERVICE AVAILABILITY

The Premium Service Management/TSAM service engagement is typically sold coterminous to the customer's annual support contract or subscription term. The Premium Service Manager/TSAM is available for regular and ad-hoc conference calls:

- **Monday to Friday**

Standard Business Hours (usually 9 am - 5 pm local time for the time zone in which the contract is signed unless otherwise requested by the customer and agreed to by PTC).

*Exceptions are made for:*

- *holidays recognized by PTC*
- *internal training*

- *time off (e.g., vacation, sick time) in accordance with PTC's paid time off policies.*
- **Saturday, Sunday, and Public Holidays**  
As required with advanced notice and at PTC's discretion

Written and verbal communication will be delivered in English unless otherwise requested by the customer and agreed to by PTC.

## SCOPE

- Although the Premium Service Manager/TSAM is consistently accessible to the customers to meet their business needs, the Premium Service Manager/TSAM will formally and proactively engage assigned customers weekly during a conference call.
- Up to three identified customer Points of Contact (PoC) can directly communicate and interact with a single Premium Service Manager/TSAM individual (or their substitute when out of the office.)
- The number of cases/incidents/service requests a Premium Service Manager/TSAM can manage at any given time is not expected to exceed 30.
- The Premium Service Manager/TSAM is a designated resource and is not expected to exceed 10 hours for one customer engagement in a given week. If a customer requires additional support beyond this anticipated average on a consistent and ongoing basis, PTC reserves the right to require the customer to purchase an additional engagement.
- Under the circumstances where a singular company purchases multiple Premium Service Management/TSAM engagements, PTC in its sole discretion reserves the right to assign the same Service Manager/TSAM to these different contractual engagements.