

SERVICES SUCCESS BUNDLES

Services Descriptions and Details

alteryx

PURPOSE OF THIS DOCUMENT

To define

- Services Success Bundles
- Description of services included
- Scope of each service

TABLE OF CONTENTS

Topic	Page	Topic	Page	Topic	Page
Services Success Bundle Description	4	Alteryx Analytics Day	11	Upgrade Advisory	18
Services by Bundle	5	Prescriptive Onboarding Program	12	Technical Account Manager	19
Services Success Bundle Add-ons	6	Community	13	Support Coverage (SEV1 Only)	20
Services Descriptions	7	Workflow Optimization	14	Learning Marketplace	21
Customer Success Manager	8	Use Case Workshops	15	Prescriptive Private Events	22
Analytics Transformation Assessment	9	Server Environment Optimization	16		
Executive Business Review	10	Environment Health Check	17		

SERVICES SUCCESS BUNDLE DESCRIPTION

Our Goal: To help customers accelerate the global democratization of analytics

Alteryx Services Success Bundles provide certain Customer Success, Support, Consulting, and Training services in an integrated tiered approach to help customers unify their analytics, data science, and process automation solutions and democratize analytics investments across on-premise and cloud environments

SERVICES SUCCESS BUNDLES

Services	Standard	Standard Plus	Premier	Premier Plus	
Success	Customer Success Manager	Digital	Digital	Named	Named
	Analytics Transformation Assessment	---	---	Annual	Annual
	Executive Business Review	---	---	Semi-Annual	Quarterly
	Alteryx Analytics Day	---	---	Annual	Annual
	Curated Enablement Sessions			4x per year	8x per year
	Prescriptive Onboarding Program	✓	✓	✓	✓
	Community	✓	✓	✓	✓
Consulting*	Workflow Optimization	---	---	2x per year	4x per year
	Use Case Workshops	---	---	2x per year	4x per year
	Server / Cloud Environment Optimization	---	---	2x per year	4x per year
	Server / Cloud Environment Health Check	---	---	2x per year	4x per year
	Upgrade Advisory	---	---	2x per year	4x per year
Support	Technical Account Manager	---	---	---	Named
	Escalation Management	---	---	✓	✓
	Target Initial Response Time (SEV1 Only)	8 Business Hours	1 hour	1 hour	1 hour
	Support Coverage (SEV1 Only)	Business Hours	24x7	24x7	24x7
	Support Portal Access	✓	✓	✓	✓
Training*	Learning Marketplace	---	---	10 Annual Subscriptions	25 Annual Subscriptions
	Prescriptive Private Events	---	---	2x per year	4x per year

*Consulting and Training Services deliverables can be used based on customer preferences. Quantities are estimates based on typical consumption profiles. Training events, Customer Choice Enablement events, and workshops are scheduled in advance.

SERVICES SUCCESS BUNDLE ADD-ON OPTIONS

Additional guidance and assistance available for Premier and Premier Plus Bundles

	Add-on SKUs	Premier Add-on	Premier Plus Add-on
1	Customer Success Manager	Named Premier CSM	Named Premier Plus CSM
2	Technical Account Manager	Named Premier TAM	Named Premier Plus TAM
3	Consulting & Training Services*	SKU Number Here Quantity	SKU Number Here Quantity
	Workflow Optimization	4x per year	8x per year
	Server / Cloud Environment Optimization	4x per year	8x per year
	Server / Cloud Environment Health Check	4x per year	8x per year
	Prescriptive Training Events	4x per year	8x per year

Add-On Services are useful...
 When there is a need for regional coverage, coverage for more than one business unit, or a need for additional consulting services

*Consulting and Training Services deliverables can be used based on customer preferences. Quantities are estimates based on typical consumption profiles. Training events are scheduled in advance.

CUSTOMER SUCCESS MANAGER

High-Level Description	Assigned Alteryx expert to help the customer develop and execute a value realization success plan
Purpose	To partner and advocate for the customer and foster and build long-term strategic relationships within the customer organization to aide with the adoption and use of Alteryx platform and solutions
Activities	Define strategy roadmaps to guide data transformation breakthroughs
Activities Occur	During standard local business hours
Duration	Subscription term
Not Included	Hands-on activities involving customer systems or data

ANALYTICS TRANSFORMATION ASSESSMENT (ATA)

High-Level Description	An analytics and data capabilities assessment to identify gaps and recommend ways in which to implement of best practices
Purpose	To help develop a tailored success plan consisting of core tactics for the democratization of analytics and industry best practices
Delivered by	Customer Success Manager
Activities	<ul style="list-style-type: none"> • One hour assessment workshop • One hour delivery and review workshop • Tracking of results is integrated into regular cadence with the customer
Activities Occur	During standard local business hours
Duration	1 Workshop = 8 hours per year contract
Not Included	Any hands-on activities performed by Alteryx resources
*Additional Info	Not all customers will be suited for ATA. Requirement is an organization that is ready to move up the analytics maturity curve and to have willingness and ability to follow recommendations

EXECUTIVE BUSINESS REVIEW

High-Level Description	Meeting with key stakeholders to gain a deeper understanding of customer priorities and goals, identify ways in which Alteryx can provide proactive guidance to help achieve them, and provide a forum to share key highlights and outcomes achieved with Alteryx.
Purpose	Aligns corporate objectives with analytics goals, ROI, and breakthrough milestones
Delivered by	Customer Success Manager
Activities	Discussion on the desired outcomes and how Alteryx can help achieve them, and review of outcomes achieved to date.
Activities Occur	During standard local business hours
Duration	1 review per year contract

ALTERYX ANALYTICS DAY

High-Level Description	An event for users or teams with the customer organization who have scheduled analytics on the Alteryx server to demo their solutions and use cases to the broader company community of analytics professionals
Purpose	To excite users and show art of analytics possibilities
Delivered by	Customer Success Manager
Activities	Analytics professionals demo their use cases and solutions leveraging Alteryx to the broader company community of analytics professionals
Activities Occur	During standard local business hours
Duration	1 analytics day = 8 hours per year contract

CURATED ENABLEMENT SESSIONS

High-Level Description	A prescriptive, outcome-driven training path that is part of an enablement plan comprised of an organized collection of lessons focused on a specific concept. These include materials curated, staged, and ready to deliver.
Purpose	To introduce concepts and functionality to the customer's user community. The concepts covered in these sessions are distinct from the courses within the learning marketplace which are more traditional training/courses.
Delivered by	Customer Success Manager
Activities	Five (5) different Discovery Series Introductory Concepts (2 lessons + up to 3 Challenges, sequential) Core Concepts (4 lessons, sequential) Automation Concepts (5 lessons, sequential) Advanced Concepts (4 lessons, sequential) Skills Challenge (TBD # of challenges, non-sequential)
Activities Occur	During standard local business hours
Duration	Each series counts as one entitlement delivery as defined in the Bundles (Premier Bundle provides 4 delivery entitlements -- Premier Plus Bundle provides 8 delivery entitlements)

PRESCRIPTIVE ONBOARDING PROGRAM

High-Level Description	A digital video series available on the Alteryx Community enabling users to get started with their Alteryx technology
Purpose	To help individual license holders learn how to use Alteryx products; content includes getting started on the Alteryx product, Alteryx Community navigation, workflow building, and product skillset acceleration
Delivered by	Online via the Alteryx Community
Activities	Self-service consumption of a video series intended to help guide the user through activities such as: <ul style="list-style-type: none">• Using fundamental functionalities of the product• Navigating the Alteryx Community for self-service support• Accessing the Alteryx Weekly Challenge to help put theory into action• Taking additional steps on the Alteryx journey (e.g., through Alteryx Academy or product certifications)
Duration	Subscription term
Activities Occur	During standard local business hours
Not Included	Does not deliver customized enablement

COMMUNITY

High-Level Description	Access the online community of Alteryx users and knowledge-based content
Purpose	Helps users on their use of Alteryx products and connect them to a community of peers
Delivered by	Self-service
Activities	Self-services consumption of knowledge base articles and solutions, interactive lessons, certain product certifications, peer-to-peer discussions, blogs, and podcasts
Activities Occur	Not applicable, self-service
Duration	Subscription term
*Additional Info	Certain exam certifications may require a fee and certain content may require additional access

WORKFLOW OPTIMIZATION

High-Level Description	Review and optimization of 1 existing Alteryx workflow of small-to-medium complexity
Purpose	Provide guidance and assistance in the optimization and tuning of an existing Alteryx workflow
Delivered by	Analytics Consultant
Activities	Working session with the customer to optimize 1 small-to-medium complexity workflow
Activities Occur	During standard local business hours
Duration	1 Workflow optimization = 8 hours per year contract
Not Included	Creation of workflows; review/optimization of any high complexity or any additional small to medium

USE CASE WORKSHOPS

High-Level Description	Assistance with the discovery and prioritization of new uses cases
Purpose	Discuss and analyze potential use cases
Delivered by	Analytics Consultant
Activities	Discovery session with key stakeholders to identify new use cases
Activities Occur	During standard local business hours
Duration	1 Workshop = 8 hours per year contract
Not Included	Any hands-on activities performed by Alteryx resources

SERVER ENVIRONMENT OPTIMIZATION

High-Level Description	Guidance on the configuration and customization of the customer's Alteryx Server environment for improved performance
Purpose	Analysis and review of the customer's Alteryx Server environment performance and configuration to identify key areas of improvement
Delivered by	Technical Consultant
Activities	Review current performance and configuration and, (if suitable in the allotted time) help implement guidance provided
Activities Occur	During standard local business hours
Duration	1 Server Environment Optimization = 8 hours per year contract
Not Included	Technical Consultant will not perform any actions on behalf of the customer

ENVIRONMENT HEALTH CHECK

High-Level Description	Health check on the customer's production environment for Alteryx Server
Purpose	Provide strategic guidance and root cause analysis on any concerns to help optimize Alteryx Server architecture and environment
Delivered by	Technical Consultant
Activities	<ul style="list-style-type: none">• Perform a health check• Scope of session will include identifying specifications for Alteryx system settings, best practices, and environment optimizations
Activities Occur	During standard local business hours
Duration	Environment Health Check = 1 hour per year contract
Not Included	Any hands-on activities performed by Alteryx resources
*Additional Info	Should root cause analysis point to the need for server or environment optimization, additional sessions and/or deeper architecture planning should be scheduled through available Server Environment Optimization hours

UPGRADE ADVISORY

High-Level Description	Preparation services for the customer-led upgrade of Alteryx production environments
Purpose	To help prepare the customer team to perform an upgrade of their Alteryx production environments using their own resources*
Delivered by	Technical Consultant
Activities	<ul style="list-style-type: none"> • Provide strategic how-to guidance to prepare production environment admin teams to upgrade • Support will be available 24/7 for any SEV1 issues encountered in production environments during upgrade or migration with a one-hour target response time
Activities Occur	During Istandard local business hours
Duration	1 Upgrade Advisory = 8 hours per year contract
Not Included	Alteryx will not perform the upgrade on behalf of the customer
*Additional Info	Customer can also engage an Alteryx partner to perform upgrade services

TECHNICAL ACCOUNT MANAGER

High-Level Description	Proactive management of customer support and escalations
Purpose	To drive issue resolution on customer support cases through a designated resource
Delivered by	Technical Account Manager
Activities	<ul style="list-style-type: none">• Ownership of escalations and coordination of internal Alteryx teams• Active management of customer support cases to ensure timely response and resolutions
Activities Occur	During standard local business hours for standard support issues, 24x7 for SEV1 issues
Duration	Subscription term

SEV1 SUPPORT COVERAGE

High-Level Description	24x7 customer support availability with an initial target response time of 1 hour for SEV1 support cases
Purpose	Provides enhanced availability and responsiveness for SEV1 support cases
Delivered by	Alteryx Customer Support
Duration	Subscription term

LEARNING MARKETPLACE

High-Level Description	Online platform that delivers Alteryx training and enablement content
Purpose	Upskilling of Alteryx users
Activities	Content includes directive curriculum, instructor-led training, webinars, and articles
Activities Occur	Not applicable; online self-service content and pre-scheduled instructor-led training
Duration	Subscription term
Not Included	Private customized learning, certifications

PRESCRIPTIVE PRIVATE EVENTS

High-Level Description	Instructor-led consulting to discover customer's training needs, build training plan, and deliver training plan
Purpose	To develop foundational knowledge for using Alteryx
Delivered by	Alteryx certified trainer
Activities	Customized training
Activities Occur	During standard local business hours
Duration	16 hours a year (Premier) 32 hours a year (Premier Plus)

THANK YOU

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