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# SERVICES SUCCESS BUNDLES

Services Descriptions and Details

alteryx | **AI PLATFORM**  
FOR ENTERPRISE ANALYTICS

## PURPOSE OF THIS DOCUMENT

### To define

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

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# 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
	Discovery Series			✓	✓
	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
	Private Training 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*	Quantity	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
	Private 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

<b>High-Level Description</b>	Assigned Alteryx expert to help the customer develop and execute a value realization success plan
<b>Purpose</b>	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
<b>Activities</b>	Define strategy roadmaps to guide data transformation breakthroughs
<b>Activities Occur</b>	During standard local business hours
<b>Duration</b>	Subscription term
<b>Not Included</b>	Hands-on activities involving customer systems or data

# ANALYTICS TRANSFORMATION ASSESSMENT (ATA)

<b>High-Level Description</b>	An analytics and data capabilities assessment to identify gaps and recommend ways in which to implement of best practices
<b>Purpose</b>	To help develop a tailored success plan consisting of core tactics for the democratization of analytics and industry best practices
<b>Delivered by</b>	Customer Success Manager
<b>Activities</b>	<ul style="list-style-type: none"> <li>• One hour assessment workshop</li> <li>• One hour delivery and review workshop</li> <li>• Tracking of results is integrated into regular cadence with the customer</li> </ul>
<b>Activities Occur</b>	During standard local business hours
<b>Duration</b>	1 Workshop = 8 hours per subscription year
<b>Not Included</b>	Any hands-on activities performed by Alteryx resources
<b>*Additional Info</b>	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

<b>High-Level Description</b>	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.
<b>Purpose</b>	Aligns corporate objectives with analytics goals, ROI, and breakthrough milestones
<b>Delivered by</b>	Customer Success Manager
<b>Activities</b>	Discussion on the desired outcomes and how Alteryx can help achieve them, and review of outcomes achieved to date.
<b>Activities Occur</b>	During standard local business hours
<b>Duration</b>	1 review per subscription year

# ALTERYX ANALYTICS DAY

<b>High-Level Description</b>	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
<b>Purpose</b>	To excite users and show art of analytics possibilities
<b>Delivered by</b>	Customer Success Manager
<b>Activities</b>	Analytics professionals demo their use cases and solutions leveraging Alteryx to the broader company community of analytics professionals
<b>Activities Occur</b>	During standard local business hours
<b>Duration</b>	1 analytics day = 8 hours per subscription year

# DISCOVERY SERIES

<b>High-Level Description</b>	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.
<b>Purpose</b>	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.
<b>Delivered by</b>	Customer Success Manager
<b>Activities</b>	Four (4) different Discovery Series are available for delivery: <b>Introductory Concepts</b> (3 lessons, sequential) <b>Core Concepts</b> (4 lessons, sequential) <b>Automation Concepts</b> (5 lessons, sequential) <b>Advanced Concepts</b> (4 lessons, sequential)
<b>Activities Occur</b>	During standard local business hours
<b>Duration</b>	Ongoing

# PRESCRIPTIVE ONBOARDING PROGRAM

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

# COMMUNITY

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

# WORKFLOW OPTIMIZATION

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

# USE CASE WORKSHOPS

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

# SERVER ENVIRONMENT OPTIMIZATION

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

# ENVIRONMENT HEALTH CHECK

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

<b>High-Level Description</b>	Preparation services for the customer-led upgrade of Alteryx production environments
<b>Purpose</b>	To help prepare the customer team to perform an upgrade of their Alteryx production environments using their own resources*
<b>Delivered by</b>	Technical Consultant
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Provide strategic how-to guidance to prepare production environment admin teams to upgrade</li> <li>• 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</li> </ul>
<b>Activities Occur</b>	During standard local business hours
<b>Duration</b>	1 Upgrade Advisory = 8 hours per subscription year
<b>Not Included</b>	Alteryx will not perform the upgrade on behalf of the customer
<b>*Additional Info</b>	Customer can also engage an Alteryx partner to perform upgrade services

# TECHNICAL ACCOUNT MANAGER

<b>High-Level Description</b>	Assigned technical advisor to assist with proactive platform support, including management of customer support and escalations
<b>Purpose</b>	To partner and advocate for the customer while fostering and building long-term strategic relationships within the customer organization to aide in the technical management of Alteryx platform and solutions.
<b>Delivered by</b>	Technical Account Manager
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Regular customer status check-ins with platform owners, application admins</li> <li>• Platform environment health checks and upgrade advisory</li> <li>• Ownership of internal and external communications for escalations and coordination with internal Alteryx teams</li> <li>• Proactive management of customer support cases to ensure timely response and resolutions</li> </ul>
<b>Activities Occur</b>	During standard local business hours, 24x7 for SEV1 issues
<b>Duration</b>	Subscription term

# SUPPORT EXPERIENCE MANAGER (SEM)

<b>High-Level Description</b>	Support Experience resource who manages complex, urgent, and high-priority customer issues and requests that require special attention and resolution
<b>Purpose</b>	To drive issue resolution on customer support cases through a designated resource (See Escalation Management definition)
<b>Delivered by</b>	Support Experience Manager
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Ownership of internal communications for support case level escalations and coordination with internal Alteryx teams</li> <li>• Active management of customer support cases to ensure timely response and resolutions</li> <li>• Digital proactive support of Alteryx platforms; Digital content for support onboarding, upgrade advisory</li> </ul>
<b>Activities Occur</b>	During standard local business hours for standard support issues, 24x7 for SEV1 issues
<b>Duration</b>	Subscription term

# ESCALATION MANAGEMENT

<b>High-Level Description</b>	Review and management of high priority issues and requests related to customer's Alteryx environments
<b>Purpose</b>	To drive timely and effective resolution of critical issues and minimize disruptions to operations or services
<b>Delivered by</b>	Technical Account Manager or Support Experience Manager
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Evaluate the urgency and criticality of the requested escalated issue to determine the appropriate level of escalation and response time.</li> <li>• Provide support and resources to expedite the resolution of escalated issues, including coordination of additional resources or escalation to higher management levels, when needed.</li> <li>• Facilitate clear and timely communication between support teams, management, and other stakeholders involved in the escalation process.</li> </ul>
<b>Activities Occur</b>	During standard local business hours
<b>Duration</b>	Subscription term
<b>Not Included</b>	Any hands-on activities performed by Alteryx resources

# SEV1 SUPPORT COVERAGE

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

# LEARNING MARKETPLACE

<b>High-Level Description</b>	Online learning platform that delivers Alteryx training courses and tracks learning activity.
<b>Purpose</b>	Upskilling of Alteryx users
<b>Activities</b>	Courses include instructor-led and digital courses.
<b>Activities Occur</b>	Instructor-led courses are scheduled during regular business hours in several time zones. Digital courses are available 24 X 7.
<b>Duration</b>	Subscription term
<b>Not Included</b>	Private courses, customized materials, certifications

# PRIVATE TRAINING EVENTS

<b>High-Level Description</b>	Instructor-led consulting to discover customer's training needs, build training plan, and deliver training plan
<b>Purpose</b>	To develop foundational to advanced knowledge for using Alteryx products
<b>Delivered by</b>	Alteryx certified trainer
<b>Activities</b>	Tailored training
<b>Activities Occur</b>	During standard local business hours
<b>Duration</b>	16 hours a year (Premier) 32 hours a year (Premier Plus)
<b>Not Included</b>	Customized materials

# Thank You