

Professional Services FAQ

Implementation Services

Q: When should a customer start the implementation process?

A: Typically a Customer Success Manager is introduced to a new customer by the sales contact soon after the contract is signed. An initial kick off meeting is set up by the Customer Success Manager and the process begins. Often it is smart practice to involve the Customer Success Manager and/or the Implementation Manager during the decision making process prior to finalizing the contract. This can help create a feeling of moving the process forward to implementation and close. It can also help the soon to be customer gain a better understanding of how the process works, what is expected of them, expected timeframe, and how they get the Engage system deployed and running.

Q: How long does a typical implementation take?

A: A typical Allegiance TotalEngage implementation can take 4 to 8 weeks depending on how fast the new customer can move through the process, providing required elements for the deployment. If fewer products are purchased, then the process can move faster. This process has also been known to take as long as six months or more depending on the responsiveness of the customer.

Q: How involved do I need to get in the implementation process as a sales representative?

A: The only involvement necessary from a sales representative during the implementation process is (a) initial introduction to the Customer Success Manager and (b) follow up throughout the process as you feel necessary.

Customer Support

Q: What qualifies as a support incident?

A: Customer Support program defines an incident as an issue that requires in-depth research on behalf of support personnel or other professional services staff.

Q: What if a customer has a simple question or needs a password reset? Does that count?

A: Questions that can be answered immediately, help that can be immediately given and references to existing information do not count as a support incident

Q: What qualifies as consulting? If customers have questions about the deployment of their survey or a question about a report does that count as consulting?

A: Allegiance customer support personnel can answer many of your questions in relation to our product line, including survey deployment and reporting questions. Allegiance also provides consulting services offered from our Best Practices consulting team. These additional services are available for a fee as customers require more in-depth knowledge and expertise surrounding customer data and its interpretation and the actions required to improve loyalty and engagement.

Education Services

Q: Are the Allegiance trainings sessions live or recorded?

A: Allegiance uses a 'blended learning' approach to education and are all available via the Web. Some of the courses are self-paced interactive and most use a live instructor. The blended learning approach means that you will receive training using a blend of these methodologies.

Q: How does a customer sign up for training?

A: All training can be included in the Allegiance standard service agreement and purchased with the other Allegiance products and offerings. This typically includes the Allegiance 90 Day Passport and the Allegiance

Annual Passport. Training courses can also be purchased a la carte and ordered by credit card at the Allegiance Education Center found at www.allegianceuniversity.com.

Q: Can a customer order on site training hosted at their location?

A: *Yes, a customer can order on site training. However, due to the effort required the customer will pay a premium for this service (see the education team for details). You should also know that until the education team grows to substantial size and we are capable of handling on site training more efficiently we recommend not offering unless the customer absolutely demands and approved by Allegiance Education Services team.*

Best Practices Consulting

Q: When do I involve consulting services?

A: *It is recommended that an Allegiance consultant be involved early in the sales process. An Allegiance Best Practices consultant can help the prospect understand from an analytical perspective why it is a good decision to purchase Allegiance products. A consultant can also help provide detail about services offered far beyond the Allegiance software solutions, helping the prospect understand the greater value Allegiance offers.*

Q: How are consulting services purchased?

A: *Allegiance consulting services can be purchased at any time with or without the purchase of a software system. It is most common, however, that they are purchased along with other products and offerings and included in the standard service agreement.*

Q: When are the consulting services delivered?

A: *There are different consulting engagements created for different stages of the product life cycle. Some come before deployment and use of the system. These make up the FOUNDATION elements. Others take place after the system has been running for more than 6 months and are included in the GROWTH segment, utilizing the system data. While others come even later in the life cycle helping customers get more from their system being a part of the ENRICHMENT section.*

Q: Are consulting services a one-time service or recurring annually?

A: *Some services are only necessary one time such as the ENGAGEMENT BOOTCAMP. This engagement is designed to set the stage and help answer questions such as "why should I care about engagement" and "what do we do about it". Most of the consulting services however, such as ENGAGEMENT QUICK WINS, have been designed to help customers get more out of their system by helping analyze their data and then assisting with the development of an action plan designed to grow business and create value, and therefore are to be executed year over year.*