



Customer Engagement Guide

Aprimo provides all day, every day support for our best-in-class Aprimo Platform Solutions. Our goal is to find problems before you do. But if you do encounter an issue and need assistance, we are here to help.

This guide outlines customer interaction with Aprimo Support, engagement channels, priority definitions and response times, as well as additional Aprimo Service offerings.

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Customer Support and Service Offerings

Customer Premier Support

- Case Creation via Aprimo Customer Portal or phone
- 24x7 / 365 coverage hours for priority 1 issues
- Technical troubleshooting and consultation
- Software updates and related release documentation
- Receive real-time updates on release deployments and system events <https://status.aprimo.com>
- Access to <https://help.aprimo.com>

Professional Services

Concierge Services

Aprimo's Concierge Services specializes in post-activation consulting services designed to help customers gain greater value from their investment and build ongoing application expertise while optimizing their overall processes.

To help our customers achieve this we offer two unique service offerings: **Optimization** and **Expert Services**.

Optimization Services

To optimize your Aprimo solution, you will be assigned a Customer Success Principal. A Principal-level consultant is the foremost expert on Aprimo and helps customers evolve their solutions. The Principal will start with a customer's key business objectives and devise a success roadmap. They also will bring application expertise and deep experience on optimizing Aprimo, then propose a set of activities to accelerate how customers realize value. As we walk this path together, the Principal will be in lock step through bi-weekly status calls with your team.

Expert Services

Our Expert Services specialize in providing ongoing monthly assistance to customers. An application expert will work with customers on a recurring basis to provide a variety of services as customers build out and manage their solution.

While our expert will always take direction from you, the team will focus on the following services:

- Conduct discovery for new requirements
- Design the solution
- New configuration and modifications
- Create reports and/or provide data expertise
- Conduct end user and administration enablement
- Conduct application training
- Provide operational and administrative assistance including user setup, views configuration, fiscal year setup and financial closeouts
- Ad hoc Q&A

These offerings provide best practices to enable your team, insights into new product features, and customized assists as you build out your Aprimo solution.

For more information on these offerings or pricing, please contact your Customer Success Director or Customer Success Manager.

Aprimo Customer Support Portal

Authorized Support Contacts can access our Customer Support Portal at any time to report new potential issues, check the status of open cases, and search our Knowledge Base of Known Issues. The Aprimo Activation team will work with you to identify Authorized Contacts that will be issued credentials to access the Customer Support Portal.

You may maintain 2 to 4 users with access to the Customer Support Portal, and, if you ever need to give additional accounts Customer Support portal access after activation, simply open a request in the portal. An Aprimo team member will review the request for completion to ensure that the user has completed the required product training. When submitting the request please include name, email, contact phone number, and details of the type of training the user(s) has completed for the Aprimo application administration.

Partner Representation in the Customer Support Portal

If you have contracted independently with an Aprimo Partner to represent your organization as your Authorized Customer Support Contact, you're required to send Aprimo Support a letter of authorization on your company letterhead signed by the customer's authorized signatory. Appropriate templates will be provided upon request of your account team representative. The Aprimo Partner you contracted with will retain authorization until you rescind it via written notification.



The Role of the Customer When Contacting Support

Who Should Contact Aprimo Support?

During implementation, Aprimo customers and partners will be asked to identify Authorized Support Contacts. This group should serve as the front line for Aprimo issues reported by the end users, with the purpose of identifying potential "business process" issues.

Access to the Customer Support Portal requires Aprimo Authorized Support Contacts to obtain one of the following Aprimo Product Certifications from Aprimo Academy:

- Aprimo DAM "Certified" Badge Curriculum
- Aprimo Productivity Management - "Certified" Badge Curriculum"

Identify an Authorized Support Contact that has a working knowledge of the business process, configuration within Aprimo and an Aprimo Certification.

What Do I Need When Submitting a Case?

- A summary of the issue you are experiencing with Aprimo, **including recreation of steps** where applicable or submitted cases that provide clear recreation steps to assist in case progression.

- Full application screenshots and/or videos.
- Business impact (please see Appendix B: Priority Definitions for guidance).
- Be available if follow up is needed. The case status will reflect when and what additional information is needed, and support team members reach out for these details.
- How many users are affected and what is the impact to your business?
- Is this an issue with one or multiple browsers (e.g. Chrome and Edge)?
- Is this the first time you have seen this behavior?
- What were you doing when you encountered the issue?
- What is the expected result vs. the result received?
- Indicate whether you approve or reject Customer Support Team Members to access the user interface of the customer's Aprimo environment during the course of the Support investigation. (Note, if you reject team member access, Aprimo Support may request a live troubleshooting session during the course of the investigation. Support appreciates a prompt response in order to progress the case efficiently.)
- Search Knowledge Portal for possible solutions and best practices
- Review Knowledge Articles presented a when entering your case details

How Do I Check the Status of My Case?

- You can check the status of your Case and Known Issues via the [Aprimo Customer Support Portal](#). Additionally you can monitor and subscribe to Status.Aprimo.com to see current platform activity, accessibility, and service status.



What to Expect When Opening a Case

Priority Rating

When submitting a case to Aprimo Customer Support, a priority rating is needed. The Priority rating represents the impact that the reported issue has on your Aprimo application and business.

The priority rating may be discussed at the time of submission to help Aprimo gain clarity into the business impact and urgency, and possibly change based on this discussion.

Priority Definitions

PRIORITY RATING 1 - **Critical**

A problem that prohibits use of the product or renders the product inoperable.

A Priority 1 case is a catastrophic issue which severely impacts the customer's production systems, as they are inaccessible or there is a system-wide performance degradation making the application platform unusable.

PRIORITY RATING 2 - **Significant**

A problem that causes a significant impact to the business; however, operations can continue in a degraded fashion.

A Priority 2 case is a production issue in which the customer can access the system, but in a severely reduced capacity. This type of issue is causing significant impact to portions of the customer's normal business operations and productivity.

PRIORITY RATING 3 - **Minor**

A non-critical problem that is impacting the customer.

A Priority 3 case is an issue that is impacting the customer, but is neither critical nor preventing ongoing use of Aprimo.

Definitions of Categories

Request: Requests for items that need action from Aprimo Support such as updating an IP whitelist, SSO certification updates, or Connector installers.

Question: General application questions that are not specific to your configuration. These types of cases are routed to our product owners and will be addressed in general application functionality and not customer specific.

Feature Flag Request: Requests to enable features that are generally available but requires the functionality to be enabled specific to an environment. (Additional information found on page 10 of this guide.)

Functionality Issue: An issue that is encountered with an unexpected result based upon an intended configuration.

Performance Issue: An issue that impacts UI navigation timing, response time, or load time.

Outage: An issue impacting user authentication or access.



Service Level Agreements & Contact Information

Closing Open Cases

Resolution of a Case (Known Issue Solution or other cause) will prompt the support team for case closure. A Support Case also will be considered closed for the following reasons:

- Failure of Customer to respond to requests for further details. Aprimo Customer Support will make two (2) attempts via the portal or phone to contact the customer. If no response is received from the customer after the first attempt, a follow up note will include a closure date.
- Resolution of a Known Issue (i.e. defect) associated with the case.
- Identification of a cause outside of an Aprimo Known Issue.
- Customer request for cancellation of a case.

Service Feature	Premier Application Support		
CASE CREATION	Phone or Portal		
	Priority 1 via phone only	Priority 2	Priority 3
ACTIVE BUSINESS HOURS	24/7 Requires customer availability via phone during investigation	9am–5pm (M-F)	9am–5pm (M-F)
INITIAL RESPONSE TIMES	Immediate via customer contact by phone	Next Business Day	Next Business Day
UPDATE RESPONSE TIMES*	Hourly or agreed upon cadence	Once every 2 business days	Once every 5 business days
ONLINE CUSTOMER PORTAL	https://aprimo.service-now.com/aprimocustomersupport		
CONTACT INFORMATION	Languages: English 24x7		
AMERICAS	1-877-794-8556 (option 2)		
UNITED KINGDOM	00-800-7627-8746 (option 2)		
AUSTRALIA	0011-800-7627-8746 (option 2)		
ALL OTHER REGIONS	Country exit code +414-395-8520 (option 2)		

* Update response times are tracked through identification of a Known Issue or solution proposed. On Known Issues, a targeted development completion date will be provided with subsequent updates given as the Known Issue progresses through key stages of the development life cycle.

Initial Response / Triage

We know your time is valuable and our solutions are critical to your business. The initial response from Aprimo Support Teams will focus on assessing whether a product issue exists, and ensuring we have what we need to troubleshoot. A senior level Support team member will be evaluating the case to determine if all artifacts are available to move the case forward, assist in defining the next step of the investigation, or assist in determining if the symptom can be associated to a Known Issue.

Case Updates

As Aprimo investigates submitted cases, assigned Support Analysts will provide timely updates on the case via the Customer Support Portal which will propagate via email to the Authorized Support Contact and customer-defined user lists. The timing of these communications will be based on the priority rating of your case and progress made.

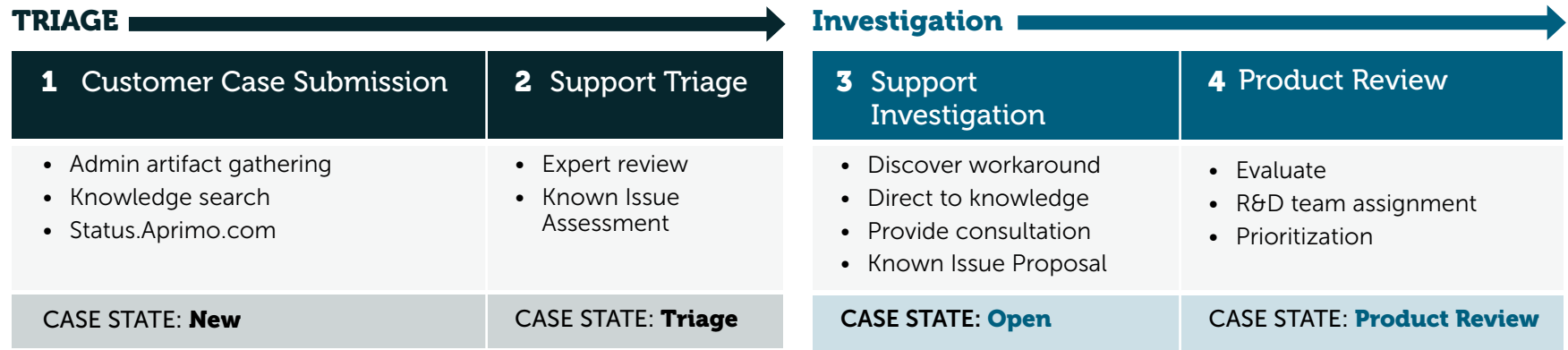
When We Need Your Help

Aprimo proactively monitors and logs thousands of data points focusing on the health and stability of our platform; combined with customer details provided at case submission, this often helps us investigate reported issues with minimal customer interaction.

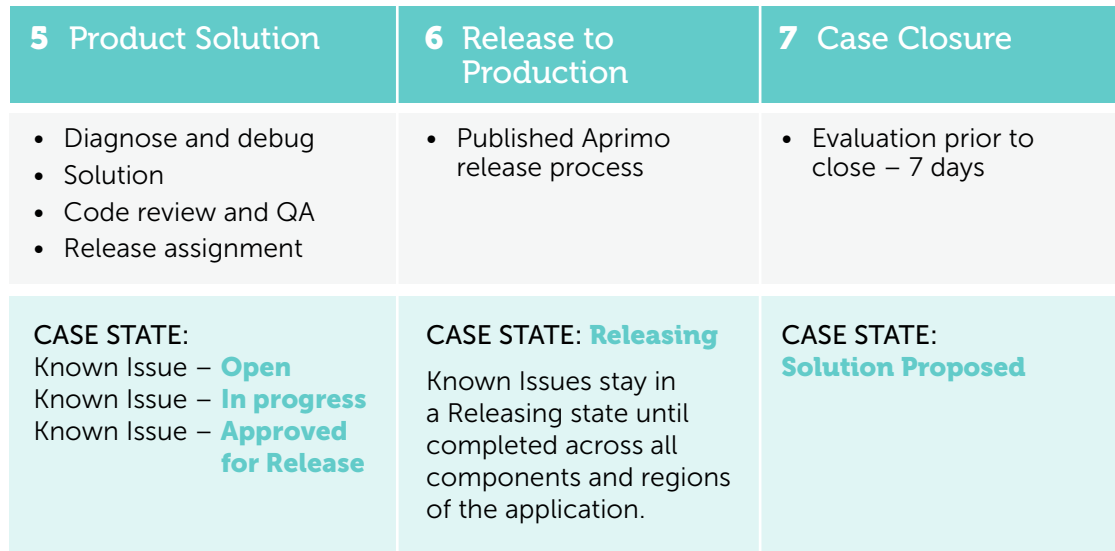
However, there are times when support needs customer assistance in narrowing down a potential issue. In cases when Aprimo needs such assistance, team members update case notes and statuses indicating that the team is unable to progress an investigation. If no response is received, case closure will occur.



Case Lifecycle Overview



KNOWN ISSUE RESOLUTION



Additional Case States

Awaiting Information – Investigation needs additional detail from Customer to progress

Solution Proposed – Long term solution or workaround has been identified

Release Management and Other Process Notes

Release Process

Aprimo updates Productivity Management bi-weekly and DAM weekly. Aprimo's release process outline and documentation is located in [Aprimo Help](#).

Aprimo encourages customers to subscribe to [Aprimo's Status page](#) to receive real-time updates on release deployments and system events. Any member in the organization can sign up to receive notifications and alerts. Once a user has subscribed, they can tailor their notifications to specific needs. There are no requirements to use this service.

For Distributed Marketing (DM) updates, release information, and help documentation please visit support.aprimodm.com/

Customers Automating Testing

The Aprimo platform is constantly evolving and continuously changing, any customer created UI automation tests could be impacted and Aprimo cannot guarantee tests will not break release to release. Aprimo will not support troubleshooting customer created automation failures due to the number of variables beyond our control. If the automation failures can be manually replicated by an end user, then a support ticket can be created and Aprimo will investigate further.

If customers choose to create automation against the application, Aprimo recommends using our [publicly accessible APIs](#) for the automation. The APIs are rarely changed and would require less maintenance by our customers.

Questions/Requests Not Directly Related to a Product Issue

Product-related Questions and Environmental Requests also may be logged as cases through the Aprimo Support Portal by submitting with the properly aligned category (question or request). Aprimo team members work with customers through the Support Portal to ensure questions are fully answered and all needs are met. Service Level Agreements do not apply to these general product questions or requests.

Refresh requests can be made once per month for each Sandbox DataSource.

Enhancement Requests

[Aprimo Voice](#) is the key platform for Aprimo to communicate our customers. This platform is open to all Aprimo customers (both business users and admin) and enables customers to easily submit and manage feature requests, as well as gain more visibility into the Aprimo Product teams.

Customers and partners can generate a login on their corporate email address to be granted access. This may take 24-48 hours for their login to be approved.

New Features

New features that have material or noticeable user impact are issued behind a "Feature Flag". A Feature Flag is a switch that enables customers, typically system administrators, to have the features activated once they are ready. The common practice is to activate in their sandbox the new feature(s), perform user training if necessary, then turn the feature(s) on in the production instance.

A complete list of feature flags currently available is located in [Aprimo Help](#).

Security Testing

Aprimo customers requiring information on security related items should contact their Customer Account Team (CSD, SE, or CSP) to engage with Aprimo Security directly. Customers who wish to perform Penetration or Vulnerability testing must engage with Aprimo Security before engaging in any test. **The Aprimo Authorization Form to Perform Security Testing will be provided upon request** to the customer's IT or Security team conducting the testing by the Customer Account Team (CSD, SE, or CSP). This form must be completed fully with signatures from the Aprimo Security team with agreement on the scope of work prior to any testing. Any findings should be submitted directly to your Customer Success Director.

Listed below are items the Aprimo Security team regularly responds to:

- Documentation Requests
- Security Questions
- Security Audits
- Penetration Test Requests
- Vulnerability findings





Early Adopter Program (EAP)

Aprimo's Early Adopter Program (EAP) is an exclusive community for customers to join and gain early access to features and functionality. Members have the opportunity to influence and shape the innovations our product teams are developing.

How it works:

- Aprimo SaaS customers are eligible and encouraged to sign up
- Aprimo Product Team selects a set of number of participants
- EAP members attend initial kickoff calls and demos
- Customers provide feedback in an online forum as they use the new functionality
- An Aprimo team member interviews participants for customer success stories
- Reach out to your Customer Success Director for more information on the EAP

Additional Resources

APRIMO HELP – <https://help.aprimo.com>

Additional help on application concepts, infrastructure maintenance, and release notes.

DEVELOPER RESOURCES –

<https://developers.aprimo.com/>

Access the Aprimo developer and API documentation that will allow you to easily develop and integrate with Aprimo products.

APRIMO ACADEMY –

<https://aprimoacademy.edubrite.com>

Aprimo Academy is the central school of learning for all Aprimo products. It is a space for Aprimo users, alliance partners, and employees to gain knowledge on configurations, best practices, and complete certification courses. Customer admins and customer SMEs can obtain access to Aprimo Academy by using the sign-up link provided on Aprimo Academy: <https://aprimoacademy.edubrite.com>.

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About Aprimo

Aprimo offers industry-leading digital asset management and work management solutions that help your teams spend their time and effort on content and marketing strategies that actually drive business outcomes and reach customers in the right channels. Its powerful Content Operations platform provides organizations with a single source of truth to optimize the way they plan, develop, govern, and deliver exceptional brand experiences at scale.



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