

# BlackBerry Customer Success Plans

## Program Description (“BlackBerry Success Program Description”)

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## Introduction

BlackBerry Customer Success Plans provide organizations with direct access to Customer Success Managers (“CSM”), best practice materials, and thought leadership assets with a focus on achieving maximum value from and adoption of BlackBerry enterprise software. With a flexible choice of plans, plus optional services designed to meet the needs of organizations - regardless of the size and complexity of its BlackBerry enterprise software deployment - there are Customer Success services to provide organizations with increased focus on achieving business value from its investments in BlackBerry solutions. By subscribing to BlackBerry Customer Success Plans, organizations may experience:

- Additional insight of and access to a full scope of BlackBerry services, support, training, and enablement options through the entire solution adoption cycle;
- Increased use of new features and functionality, including early access through beta program invitations;
- The ability to predictably manage business growth and process change;
- More realized business value from its BlackBerry deployment by using a data-driven approach and proven methodology;
- Clarity in near-term and long-term targets for adoption, understanding current adoption and engagement of BlackBerry software;
- Increased company-wide product adoption by identifying and removing deployment obstacles and ensuring readiness;
- Access to mobility best practices and materials to support smooth deployments, engaged users, and adoption of products;
- Reduced project risk, providing early identification of project health concerns and creating plans to mitigate;
- Improved user experiences;
- Planning and optimizing BlackBerry deployments to other regions or subsidiaries, and adding additional use cases for mobility;
- Maximized return on investment and business value from purchased BlackBerry software.

**Note:** Except as outlined in this document, each service offered within the BlackBerry Customer Success Plan program will be delivered in English only.

## BlackBerry Customer Success Plans Overview

The BlackBerry Customer Success Plan program provides two distinct plans:

### 1) Success Plan

Success Plan customers are provided access to a proven adoption framework of workshops, content, activities, business reviews, templates and assets, using both onsite and offsite interactive engagements with a designated CSM. This framework of adoption-focused resources applies to customers across industries and verticals and supports customers along the full cycle of their solution adoption cycle. Use of the Success Plan adoption framework provides insights into key adoption and usage metrics at the beginning of the plan, establishes targets for adoption, then tracks, measures and reports on progress towards the targeted adoption goals.

The Success Plan customer is assigned a designated Customer Success Manager that will engage with customer business and technology teams. During the initial sessions, the CSM will be seeking to understand the most important desired medium-to-long term business outcomes aligned with BlackBerry software, and will use these understandings to tailor the adoption framework to the customer. The Success Plan provides a full schedule of regular interactions with the customer teams, including the option of one annual onsite workshop visit, plus remote workshops and governance conference calls to ensure a continuity of service throughout the adoption plan cycles. Assigned CSMs can be contacted directly via phone and email by customers.

### 2) Success Plus Plan

Like the Success Plan, the Success Plus Plan provides a prescriptive adoption framework, which for Success Plus Plan customers is highly customized to their specific stage and lifecycle, supported with onsite and offsite engagements from a highly-designated CSM, most often with experience in the customer's industry. Additionally, customers who subscribe to the Success Plus Plan have the option to participate in exclusive workshop opportunities with the goal to achieve enhanced platform deployments and to discover new use cases which create even more business value. Success Plus Plan customers are assigned an executive sponsor, who aligns with the customer's senior leadership, with the goal to build a beneficial partnership aligned to accelerated adoption and business value realization.

The Success Plus Plan provides a full schedule of regular interactions with the customer teams, including the option of four onsite workshop visits, plus remote workshops and regular governance conference calls to ensure a continuity of service throughout the adoption plan cycles. Assigned CSMs can be contacted directly via phone and email by customers.

Like the Success Plan, use of the Success Plus Plan adoption framework provides insights into key adoption and usage metrics at the beginning of the plan, establishes targets for adoption, then tracks, measures and reports on progress towards the targeted adoption goals.

In addition to our adoption framework, Success Plan and Success Plus Plan customers may purchase certain other professional services and support services to enhance their BlackBerry planning and deployment projects. As a benefit, the CSM will understand programs and recommend interactions with teams and resources at BlackBerry that may provide opportunities to further enhance BlackBerry software configurations, shorten time of deployments and increase rates of adoptions.

## Success Plans Features

Below is an overview of some of the common activities performed with customers:

Phase	Feature	Description <sup>1</sup>	Success <sup>2</sup>	Success Plus <sup>2</sup>
<b>Strategize &amp; Plan</b>	Strategy Workshop and Goal Setting	<p>Initial Session:</p> <ul style="list-style-type: none"> <li>Develop a mutual understanding of Customer Success</li> <li>Identify business benefits from mobility</li> <li>Incorporate mobile app trends and business drivers</li> <li>Identify long term mobility goals (1yr, 3yr Vision)</li> <li>Business &amp; Technical Dependencies</li> </ul> <p>Create and Baseline your Mobile Success Dashboard:</p> <ul style="list-style-type: none"> <li>Identify current state of product(s) Adoption and User Engagement</li> <li>Add secondary metrics of success</li> <li>Include business value goals from 1yr vision</li> <li>Create Adoption and Engagement Targets</li> <li>Create draft dashboard</li> </ul> <p>Create and Measure your Product Transition Plans:</p> <ul style="list-style-type: none"> <li>Following Product Roadmap workshop, identify future deployment milestones</li> <li>Create work-back plan</li> </ul>	1x per year	2x per year
	Security Vulnerability Assessment Workshop	<ul style="list-style-type: none"> <li>Comprehensive vendor-agnostic review of your mobile security</li> <li>Discover your security strengths and vulnerabilities</li> <li>Conduct review of 100+ controls in 20 categories</li> <li>Learn best practices to improve Security</li> </ul>	1x per year	2x per year
	BlackBerry Product Roadmap Reviews	<ul style="list-style-type: none"> <li>Update of platform and product plans</li> <li>360° view of BlackBerry strategies and portfolios</li> <li>Ask questions of BlackBerry Product Management</li> </ul>	1x per year	3x per year
	Strategic Business Reviews	<ul style="list-style-type: none"> <li>Customer Adoption Plans</li> <li>Adoption Progress Review</li> <li>Top Mobile Use Cases</li> <li>Program Changes</li> </ul>	1x per year	3x per year
	Management Engagement	<ul style="list-style-type: none"> <li>BlackBerry Executive Sponsor</li> </ul>	--	Ongoing

Phase	Feature	Description <sup>1</sup>	Success <sup>2</sup>	Success Plus <sup>2</sup>
Deploy	Environment Assessment	<p>Technical Review:</p> <ul style="list-style-type: none"> <li>• Ensure BlackBerry and Customer Technical Teams are aligned to common goals</li> <li>• Generates requirements for customer deployment plans</li> <li>• Identify need for additional BlackBerry teams and services</li> <li>• Captures Risks, Milestones, KPIs</li> </ul> <p>Technical Architecture Validation:</p> <ul style="list-style-type: none"> <li>• Review Environment Transition Plan &amp; Change Control Process</li> <li>• Ensure technical teams have POC plans</li> <li>• Ensure Capacity Planning due diligence</li> <li>• Ensure Environment Health Screen is up to date*</li> </ul>	1x per year	2x per year
	Mobility Deployment Plan Workshop	<ul style="list-style-type: none"> <li>• Identify optimal end-state configuration</li> <li>• Define the scope of the current deployment (groups, impacted orgs)</li> <li>• Create a communication plan, support plan for deployment phase</li> <li>• Outline potential risks and challenges (based on best practices), with plans to mitigate</li> <li>• Define measurements and reporting of deployment</li> </ul>	1x per year	1x per year
	Mobile App Policy & Security Profile Workshop	<ul style="list-style-type: none"> <li>• Mobile Device Lifecycle Management</li> <li>• Application security</li> <li>• Organizational security structure</li> <li>• Security configuration change management</li> <li>• Risk assessment</li> <li>• Security incident and response</li> <li>• Governance/HR alignment</li> <li>• Security awareness plan</li> </ul>	1x per year	1x per year

\*Health Screen service is included with certain Technical Support plans, or alternatively can be purchased as a Professional Service for a fee

Phase	Feature	Description <sup>1</sup>	Success <sup>2</sup>	Success Plus <sup>2</sup>
<b>Engage &amp; Optimize</b>	App Management Best Practices Workshop	<ul style="list-style-type: none"> <li>• Understand MAM/Mobile App/Product features and gaps</li> <li>• Review and expand application deployment plans</li> <li>• Build communication plans to educate end users updates to UX</li> <li>• Assistance for web teams (IT and LOB) on program lifecycle planning for apps</li> </ul>	1x per year	1x per year
	End-User Adoption & Engagement Workshop	<ul style="list-style-type: none"> <li>• For apps/workflows that have been deployed, ensure maximum Adoption (maximizing ROI for app effort)</li> <li>• Identify measurements for app engagement/utilization</li> <li>• Review &amp; provide industry best practices for activities supporting increased app adoption/usage</li> <li>• Best practices for utilizing End User champions</li> <li>• Identify quantitative and qualitative measurements for feedback of apps/workflows (reporting and user surveys)</li> </ul>	1x per year	2x per year
	Help Desk Strategy Workshop	<ul style="list-style-type: none"> <li>• Capture deployment needs including technical planning with support teams</li> <li>• Ensure support workflows are current</li> <li>• Create communication plan and templates for provisioning, use, surveys and checkpoints</li> <li>• Review mobility policies best practices and changes (security, access, support)</li> </ul>	1x per year	2x per year

Phase	Feature	Description <sup>1</sup>	Success <sup>2</sup>	Success Plus <sup>2</sup>
<b>Expand</b>	App Strategy & New Use Case Discovery Workshop	<ul style="list-style-type: none"> <li>Understand the overall app ecosystem, in use and desired</li> <li>Identify known Use Cases, discover new use case needs</li> <li>Expand discovery sessions beyond IT to lines of business</li> <li>Educate teams on app and trends, both horizontal and vertical</li> <li>Define an action plan to solve for Use Case development</li> </ul>	2x per year	4x per year
	App Factory Best Practices Workshop	<ul style="list-style-type: none"> <li>Introduce API Platform and SDK to developer teams</li> <li>Identification of target application(s) for support</li> <li>Review professional services developer training opportunities</li> <li>Review App Framework vendors and best practices</li> </ul>	1x per year	1x per year
	Using Intranet Access to Increase Productivity Workshop	<ul style="list-style-type: none"> <li>Best practices for Enterprise App Stores</li> <li>Reviewing maximized use of Workspaces and BYOD</li> <li>Using SSO to increase adoption</li> <li>Understanding document access &amp; security profiles</li> </ul>	1x per year	1x per year
	Establishing & Measure ROI Workshop	<ul style="list-style-type: none"> <li>Build a view of Costs for TCO</li> <li>Identify efficiencies, effectiveness, and error reduction to calculate ROI</li> </ul>	1x per year	1x per year

1. Feature descriptions, goals, activities, and deliverables are samples descriptions. Not all activities and deliverables listed in this table will be received by all customers. Each customer of the Success Plan and Success Plus Plan will discuss with their CSM the goals and activities from the BlackBerry Customer Success Plan features and choose the most applicable for their environment and business needs, possibly forgoing some features while enhancing other features.
2. Suggested frequency over a one-year duration. Maximum frequency within the base plans. Frequency of features and activities may occur less often than described in this program description.

## Customer Responsibilities

Customer resources and teams play an important role in the delivery of BlackBerry Customer Success Plans. Customer responsibilities for support of BlackBerry Customer Success Plan services include:

- Introduction to key business and technical participants involved in mobile, enterprise solutions, and line of business application and use cases planning and deployments.
- Customer must provide BlackBerry CSMs with information and resources to successfully execute the BlackBerry Customer Success Plans. This can include providing access to project team members and resources, and attendance by these resources in planning, execution, or preparation meetings.
- Providing BlackBerry with accurate information about systems and software related to BlackBerry deployments, in support of accurate and efficient understanding of use and consumption of the BlackBerry and appropriate adjacent solutions.
- Providing BlackBerry CSMs with appropriate workspace when onsite, either conference room or workstation.
- To provide effective use of time and resources, customers will ensure that a limited group of individuals (up to ten) contact CSMs directly.
- Site preparation and related environmental requirements.
- Insights into past use, current use, and future planned use of BlackBerry software licenses.
- Participate in evaluating escalation priorities, when necessary.
- Coordinate, facilitate, and participate in periodic business, program, and project reviews and technology meetings.
- Ensure resources are available in a timely manner to undertake tasks such as change control and documentation review.
- Timely responses with requested information needed by CSMs in order to prepare for meetings or complete reports, assessments and deliverables.
- Ensure that all plans, proposals, templates, and other materials used in the delivery of the BlackBerry Customer Success Plan will not be shared with individuals not employed or contracted by the customer, regardless if those individuals are contracted by the customer.
- Ensure that it has necessary escalation and communication channels to resolve any program blockers in a timely manner, including project dependencies on third parties and Customer's other vendors, suppliers, and consultants.
- Any additional travel and expense costs for travel if requested by the customer and agreed to by BlackBerry, beyond the scope of onsite visits defined in this program description. These Travel and Expense costs can be paid by Customer prior to the engagement, or at actuals cost to BlackBerry, invoiced to the Customer at engagement completion.
- Responsibility for all BlackBerry system installation, configuration, deployment, end user training and support.
- Responsibility for installations/upgrades/configurations/etc. identified by BlackBerry in the delivery of the BlackBerry Customer Success Plan. BlackBerry is not responsible for issues that result from Customers installations or use of BlackBerry or third party products, including service disruptions or service outages and issues.
- Support of products non-BlackBerry products.

## **Out of Scope Services**

Services that are not described within a customer's designated BlackBerry Customer Success Plan as outlined above, are outside the scope of BlackBerry Customer Success Plan. If a customer requests any services that are out-of-scope, the BlackBerry CSM will inform the customer of other optional services and programs provided by BlackBerry that may be subject to additional charges.

### **Interactions with other services from BlackBerry**

While performing BlackBerry Customer Success Plan activities, the CSMs and the customer may engage with other BlackBerry teams, programs, and services. For the avoidance of doubt, BlackBerry Customer Success Plans do not replace previously contracted professional services engagements still in progress, nor do BlackBerry Customer Success Plans provide any level of technical support services. CSMs are not responsible for services and support besides that described in this program description, even though CSMs may participate in conversations relating to all aspects of the BlackBerry software and services, including technical planning, deployment, and technical support. All technical support services continue to follow the appropriate paths for interactions, issue identification, escalation and resolution defined by the technical support program subscribed to by the customer.

### **Additional Limitations, Exclusions, and Additional Customer Responsibilities**

BlackBerry is not responsible for delivering all tasks, activities, deliverables, or a subset of activities defined in this program description. The adoption framework defined in this program may be utilized in part or in whole by the customer.

BlackBerry may choose, at its own discretion, to change CSM assignments for customers at any point and at any frequency within the BlackBerry Customer Success Plan term. If ever requested by a customer, BlackBerry will attempt to re-assign a new CSM.

BlackBerry is not responsible for the installation, configuration, or validation of any software or hardware, tools, or utilities.

BlackBerry only provides advisory services included with BlackBerry Customer Success Plans; no actual software license, systems architecture, systems design, installation, implementation or support is included in this service.

In support of sharing confidential product plans or company information, BlackBerry may request the customer to sign NDA agreements. If the customer declines to sign these NDA agreements, BlackBerry may refrain from sharing confidential information or refrain from providing certain BlackBerry Customer Success Plan services that would involve sharing confidential information.

BlackBerry may subcontract all or a portion of the services and/or have the services performed by one of its affiliates.

BlackBerry offers additional consulting and educational offerings. To learn more about these offerings, please go to: <http://us.blackberry.com/enterprise/products/support-services.html>

**Note: the services described in this Program Description are subject to the terms and conditions of the Business Services by BlackBerry Terms found at: <http://us.blackberry.com/legal/technical-support-terms.html>**

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