



Smart Transition Methodology

COMPREHENSIVE. CONSISTENT. PREDICTABLE.

At Spinnaker Support, we know that IT leaders have questions about what it will be like to switch from vendor support to a third-party support alternative – and whether the switch makes sense. Over 1,000 clients worldwide have found that switching to Spinnaker Support is more than a safe choice. For them, it is a smart choice.

SMART TRANSITION PRINCIPLES

Your transition to Spinnaker Support begins with onboarding. Our transition process reduces risks by applying three key principles:

- **Comprehensive Steps** — We apply a proven roadmap of actions that help you understand and succeed in your transition to Spinnaker Support.
- **Consistent process** — Our ISO 9001:2015-governed third-party software support processes apply best practices to help you make the transition while protecting software publishers' intellectual property rights.
- **Predictable timetables** — We help you to understand key delivery dates due from your staff and from Spinnaker Support. We manage projects and effectively communicate progress throughout the switchover process.

SMART TRANSITION PROCESS

At its core, the Spinnaker Support model is based on a thorough due diligence process to understand your unique SAP or Oracle environment. Then, we hand-pick your support team, ensuring the right balance of skillsets, chemistry, and geographic reach. This approach accelerates the relationship building process and enables the best long-term support. Our proven process helps Spinnaker Support staff to develop in-depth knowledge of your organization's technology landscape, system configurations, and business processes. This empowers our skilled engineers to develop a good functional and technical perspective that helps resolve complex cases quickly. We truly become a natural extension of your internal staff.

Spinnaker Support applies a three-phased approach to help your organization experience world-class support.



Smart Transition Phases

“

Spinnaker Support is delivering as promised. Their robust, audited processes enabled timely, smooth onboarding from Oracle maintenance. Oclaro is realizing significantly faster speeds of response, problem diagnosis, and issue resolution for less cost.

”

The process has been continuously improved over the years from onboarding of nearly 1,000 customers. Each phase of onboarding activities is designed to support the continuous knowledge transfer of your practices, processes, culture, and technologies to our core team. The duration of each phase is based upon customer and system complexity, as well as the scope of services to be delivered. Our onboarding phases focus on:

Clear responsibilities — We collaborate with you to identify crucial roles, responsibilities, and resources, including task owners, approvers, contributors, and others who need to be informed. You know who is responsible for project activities.

Project management — Using our proven, ISO 9001:2015-certified processes, we communicate with you about needed action steps, predictable timetables, task owners, and progress. You know what will happen, when, and by whom.

Knowledge transfer — Using our proven approach, we gain detailed knowledge of your environment including customizations, previous support issues, relevant business processes, and key individuals. As a result, our expert staff deliver tailored, effective support during live operations from the first call to final resolution.

INITIATE PHASE

TRANSITION INITIATION

To be successful in maximizing benefits while minimizing risks, preparation and planning is a crucial step in the team's preparation for delivering maintenance support. The Spinnaker Support team works closely with your staff to plan and execute effective transition activities, as follows:

- Assign Account Support Lead (ASL)
- Begin the alignment process
- Construct client-specific documentation and prepare initial onboarding presentation
- Create a ticket to set up new customer in IT service management (ITSM) system
- Create secured, private customer knowledge transfer folder to share with the support team (contacts, services, software modules, releases, assignments, etc.)
- Define team assignments, make introductions
- Learn and plan how to best adapt and follow client security policies
- Outline connectivity and system access process
- Outline interoperability opportunities
- Outline transition planning process
- Review requirements and recommendations for knowledge sharing and software archiving
- Review contract
- Review scope of services

To speed up the Transition Initiation phase, Spinnaker Support teams focus on self-study and preparation for one-on-one meetings with your organization's knowledge experts. Our engineers average over 15 years of relevant experience supporting many clients in many different industries. This experience has helped them develop effective self-study methods for researching customer's environments so that meetings can focus primarily on addressing questions.

% Complete	Task	Start Date	End Date	Lag (Dn)	Predecessors	Spinnaker Resources
Customer Onboarding Project Template - SAP						
Rev 02, 2015.FEB.03						
0%	Sales Cycle	06/01/15	06/22/15	16		
0%	Contract/Support Start Date	07/01/15	07/01/15	0		
0%	Agreed Onboarding Start Date	07/01/15	07/01/15	0		
0%	Customer Onboarding	07/02/15	12/11/15	117		
0%	Prepare	07/02/15	07/13/15	8		
0%	Introduce	07/09/15	07/21/15	9		
0%	Connect	07/10/15	08/03/15	17		
0%	Archive (if applicable)	07/10/15	12/11/15	111		
0%	Share	07/10/15	08/20/15	30		
0%	Onboarding Wrap-Up	12/14/15	12/16/15	3		
0%	SAP Maintenance End Date	12/31/15	12/31/15	0		
0%	Updated Customer Documents (Attached)	06/08/15	12/14/15	136		

Task	Start Date	End Date	Lag (Dn)	Predecessors	Spinnaker Resources
Contract/Support Start Date	07/01/15	07/01/15	0		
Agreed Onboarding Start Date	07/01/15	07/01/15	0		
Customer Onboarding	07/02/15	12/11/15	117		
Prepare	07/02/15	07/13/15	8		
Introduce	07/09/15	07/21/15	9		
Customer Onboarding Meeting (Kick-Off Meeting)	07/09/15	07/09/15	1	38	Spin ASL, Spin Dedicate, Spin Sales, Spin VP-S&F
Send Post-Onboarding Welcome Email to Customer (Using Template + Attachments)	07/09/15	07/10/15	2		
Create Post-Onboarding Email (Use Attached Template Titled "Post Onboarding Email Template - SAP")	07/09/15	07/09/15	1	40FS -1 day	Spin ASL
Update & Send "SAP Spinnaker Support Contact Information Template" to Customer (update & use attached template)	07/09/15	07/09/15	1	40FS -1 day	Spin ASL
Send Spinnaker "Remote Support (TeamViewer OS) Customer" to Customer (doc attached)	07/09/15	07/09/15	1	40FS -1 day	Spin ASL
Send Spinnaker "SAP System Access Protocols" to Customer (doc attached)	07/09/15	07/09/15	1	40FS -1 day	Spin ASL
Request Customer SAP Landscape Diagram	07/09/15	07/10/15	2	40FS -1 day	Spin ASL
Customer Review & Follow-Up for Onboarding Welcome Email + Attachments	07/13/15	07/15/15	3		
Review "Spinnaker Support List of Contacts" & Notify ASL with any Questions	07/13/15	07/13/15	1	41	
Review Spinnaker "TeamViewer User Guide" & Notify ASL with any Questions	07/13/15	07/13/15	1	41	
Review Spinnaker "SAP System Access Protocols" & Notify ASL with any Questions	07/13/15	07/15/15	3	41	
Complete & Send Customer SAP Landscape Diagram to ASL	07/13/15	07/15/15	3	41	

Standardized Project Plan

PRE-LAUNCH PHASE

PRE-LAUNCH EXECUTION

Spinnaker Support's Engagement Manager and Account Support Lead work closely with you to manage tickets, solution development, delivery, and performance reporting. The core team continues to work closely with your support team to understand all business operations and related support activities as they move closer to the Launch Phase.

- Access GUI and maintenance environments on client systems
- Adjust customer and/or Spinnaker Support processes as necessary
- Create ticket to enable customer login access to issue tracking system
- Exchange of protocol information (IP addresses, machine names, etc.)
- Obtain request forms from customer (contact template, environment access form, year-end requirements, and system landscape)
- Provide documentation to customer (issue tracking system user guide, system access protocols, Spinnaker Support contact info, etc.)
- Review customer IT roadmap, ensure alignment with roadmap
- Review tax and regulatory requirements with customer
- Setup dedicated virtual machine to create single point of entry into client systems
- Setup VMWare backup connection solution
- If customer is preparing to terminate their Support Agreement with the software publisher, provide appropriate advice on procuring and archiving documents and updates to which they may be entitled (and optionally perform the work as a managed service). Spinnaker Support typically manages and executes archiving for customers as well.

LAUNCH PHASE

LIVE SUPPORT LAUNCH

The goal is to achieve a state of support delivery maturity which enables Spinnaker Support, led by its Engagement Manager, Account Support Lead, and dedicated Support Team Leads, to take over break/fix maintenance responsibilities for our client solutions while keeping our understanding of the system up-to-date.

- Confirm with customer and assigned Spinnaker Support team that all onboarding tasks have been completed satisfactorily
- Integrate the skills matrix with the client information
- Verify that all year-end support arrangements are started
- When onboarding tasks are complete, store updated checklists to SharePoint and revise ITSM system ticket for onboarding activities
- Send customer email communication to kick off new support service
- Deliver ongoing support
- Provide monthly and year-end Global Tax and Regulatory (GTRC) updates (optional)

“

After exhaustive due diligence, we opted to pass on upgrading or migrating our existing E-Business Suite and Siebel software applications. Third-party software support is tailor made for our organization and Spinnaker Support is the wise choice for us. We have begun the archiving and onboarding process and Spinnaker Support is providing great guidance.”

— CIO, Consumer Goods Company

Case Study

A leading Canadian telecommunications carrier decided against paying the high costs of upgrading their ERP software. Following that decision, their staff looked for ways to better support their software and decrease costs. They investigated third-party support options. Ultimately, they selected Spinnaker Support based on highest client and employee satisfaction and retention, lowest vendor risks, and breadth of service capabilities.

Upon selection, Spinnaker Support quickly initiated onboarding activities to gain deep knowledge of the company's people, processes, technology, organization, and practices. With this knowledge, Spinnaker Support personalized their support of the company. Spinnaker Support delivered effective archiving services. Spinnaker Support ensured that all software and product documentation to which the client had access rights was downloaded and packaged in a searchable archive, hosted by the client. This gives the client access to deploy all patches and upgrades licensed through the time of switching to Spinnaker Support.

During the onboarding process Spinnaker Support:

- Created the archiving project plan
- Assisted in the identification of software and documentation to be archived
- Helped to coordinate the download of nearly 300,000 notes, more than 8 enhancement packs, 16 kernels, 4 GUI updates, and numerous support packs and other components
- Ensured that the archiving work was completed in less than 6 weeks

As part of the onboarding process, Spinnaker Support's Global Tax and Regulatory Compliance (GTRC) team worked with the client's payroll and tax staff to identify requirements specific to the client's business operations and locations in Canada and the US. Spinnaker Support then worked with the client to ensure that all applicable publisher legal and payroll notes up to the time of switching were downloaded and available for implementation. Additionally, Spinnaker Support has assumed responsibility for indentifying and implementing future legal changes since the end of publisher support for the client.

The client is saving more than \$1.2 million per year...savings being reinvested in innovations, operations, or bottom line results.

ONBOARDING PROCESS FEATURES

PROJECT MANAGEMENT

- Apply ISO 9001:2015-governed project planning, project management, and client relationship management

TECHNICAL KNOWLEDGE TRANSFER

- Share details of environments, customizations, business processes, and key parties

SOFTWARE UPDATE ARCHIVING

- Create a searchable archive of licensed, uninstalled upgrades, patches, and related materials in case you wish to deploy them in the future. Protect the software publisher's intellectual property rights by archiving only what the client is legally entitled to download and store

GLOBAL TAX AND REGULATORY COMPLIANCE MANAGEMENT

- Verify global tax and regulatory compliance management needs

ABOUT US

Spinnaker Support is the leading global provider of third-party support and managed services for Oracle and SAP enterprise software products. Spinnaker Support clients gain more comprehensive and responsive service, save an average of 62% on their support fees, and can remain on their current software release indefinitely. They trust Spinnaker Support to keep their enterprise applications running at peak performance and to help them navigate from on-premise to hybrid to cloud.

Spinnaker Support operates from ten regional operational centers located in Denver, Dubai, London, Mumbai, Paris, Sao Paulo, Singapore, Seoul, Tel Aviv, and Tokyo. Our award-winning blend of services span SAP, BusinessObjects, Oracle E-Business Suite, JD Edwards, Siebel, Oracle Database, Oracle Technology and Middleware products, Hyperion, Agile PLM, ATG/Endeca, and more.

