



# Shiftboard Support Plans

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# Shiftboard Support Plans

Shiftboard understands that successful software implementation goes beyond initial onboarding and setup. We offer two support options catering to your specific needs to ensure you can continuously maximize the value of our product and partnership. Our Standard Support provides reliable assistance for any software-related inquiries or issues, while our Premium Support takes it a step further, offering a comprehensive package designed to deliver enhanced expertise, expedited response times, and exclusive resources aimed at enhancing product adoption.

	Standard	Premium
<b>Product Support</b>		
<b>Business hours product support via email, phone, and chat</b> Monday–Friday, 6am–5pm PST, except for designated holidays (Christmas Eve, Christmas, and New Year’s Day). See Appendix for details	✓	✓
<b>After-hours product support via phone</b> Emergency response for P1 or P2 critical issues notified by phone Monday–Friday, 5pm-6am PST plus weekends and holidays	✓	✓
<b>Severity-based Service Level Agreement (SLA) target response time</b> See Appendix for details	Standard	Expedited
<b>Real-time system status update</b> Access real-time system availability status and receive outage alerts through Shiftboard's support web portal.	✓	✓
<b>24/7 application monitoring</b> Proactively detect and resolve potential performance issues, such as memory and processor usage spikes, before they impact you.	✓	✓
<b>Application uptime reporting</b> Request reports on system availability and uptime within a timeframe.		✓
<b>Technical Account Management</b>		
<b>Support case analysis and reporting</b> Receive a monthly support case report on response times, resolution duration, case volume, topics trends, and improvement suggestions.		✓
<b>Test environment and refreshes</b> Access a test environment with cloned production data for training and testing software changes, with the ability to refresh cloned data.	Up to 2 refreshes per year	Up to 8 refreshes per year

	Standard	Premium
<b>Health Checks and Adoption Support</b>		
<b>Monthly adoption metrics and analysis</b> Receive a monthly product usage report on usage metrics, user adoption trends, and recommendations by a dedicated Customer Success Manager (CSM).		✓
<b>Quarterly health checks</b> A quarterly call with a dedicated CSM to: <ul style="list-style-type: none"> <li>Review product usage effectiveness and support case trends</li> <li>Identify product and training material enhancement needs</li> <li>Receive best practices and recommendations to optimize product value</li> </ul>		✓
<b>Product feedback sessions</b> A bi-annual meeting with our product teams to gain product roadmap insights and share product feedback, ensuring product alignment with your long-term needs.		✓
<b>Training and Educational Support</b>		
<b>Self-serve help portal</b> Access to a comprehensive library of help documents to troubleshoot issues autonomously, saving time and reliance on the support team.	✓	✓
<b>24/7 online training platform</b> Access to on-demand training through our Learning Management System (LMS), a self-paced program for onboarding new hires and retraining seasoned users.	✓	✓
<b>Supplemental training session</b> An annual scheduler training session by a dedicated CSM to provide additional and refresher training on existing workflows and rules.		✓

# Appendix

## Product Support

Product support is available via email, phone, and chat. Available hours are dependent on your success package. Product Support includes the following services:

- Addressing system service interruptions / outages
- Performing system service updates / maintenance
- Researching and addressing system service behavior that is not in line with what the customer's users expect
- Responding to questions regarding functionality on browser and apps
- Support published integration endpoints for Drop Point and API integration services
- Support on designated direct integrations provided by Shiftboard, such as to Ceridian Dayforce
- Light configuration changes that support technicians can complete without requirements or process discovery

The Product Support Helpdesk does NOT cover the following services:

- Responding to and actioning requests from third-party vendor(s) of the customer
- Issue troubleshooting related to networks, devices, servers, and workstations managed by the customer, including mobile devices
- Requests relating to pre-processing of data for integrations prior to calling integration endpoints
- Performing major configuration changes / site optimizations
- Supporting customer workflows outside of Shiftboard applications
- Support and troubleshooting on how to construct API calls in general
- Significant customer retraining on Shiftboard applications

Phone and email support are also available after business hours between 5pm–6am U.S. Pacific Time on weekdays, weekends, and holidays. Emergency response to issues within these after-hours service windows is restricted to critical (P1 or P2) issues as defined below.

## Severity-Based Service Level Agreements

Severity	Severity Definitions	Targeted Response (Premium)	Targeted Response (Standard)	Targeted Resolution
P1	<p><b>Critical business impact:</b> Production use of the solution is stopped or so severely impacted that all end users cannot use core functionality, and there is no reasonable workaround.</p>	2 hours	4 hours	24 hours
P2	<p><b>Significant business impact:</b> Production use of major functionality within the solution is severely limited with no reasonable workaround, or a significant proportion of end-users are unable to use core functionality.</p>	4 hours	8 hours	5 business days
P3	<p><b>Some business impact:</b> Loss of Production functionality with moderate overall business impact to an individual or group, and there is no reasonable workaround.</p>	1 business days	2 business days	30 business days
P4	<p><b>Minimum business impact:</b> Minor functional errors where reasonable workarounds are available; or requests for information, enhancements, or documentation clarification.</p>	1 business days	3 business days	N/A

## Examples of Severity Level grading by type of issue

Priority 1 case examples: (critical business impact)

- A production server has failed.
- Multiple users cannot access the production servers.
- Performance of the servers has degraded to an unusable level.
- Critical business data is unrecoverable, corrupt, or lost.

Priority 2 case examples: (significant business impact)

- Issue is critical to customer's business operations.
- Critical component returning error or not responding.
- Degraded application performance is having a serious negative impact on business.
- A database or application error has occurred, which severely impacts business operations.

Case examples not typically categorized as Priority 1 or Priority 2:

- Database is operational following a one-time outage; root cause analysis required.
- Feature Request or customization.
- Customer is not available for collaboration with support engineers after hours.
- General questions such as "how-to" or syntax questions.
- Issue with little or no impact.
- Documentation issues.
- Issue is essentially resolved but remains open for customer confirmation.
- An effective workaround has been provided pending final resolution of an issue initially classed as P1 or P2.
- Intermittent wait status with little or no customer interaction required.
- Reports, bulk uploads, or other non-critical business needs.

## Systems Status Reporting

We provide real-time status for our solutions via web portals at [ScheduleFlex System Status](#) and [SchedulePro System Status](#). Users can subscribe to these services to receive alerts in the event of any significant system outages.

## Application Monitoring & Reporting

Our application monitoring tools run 24/7 and detect spikes in memory, processor usage, and other key performance metrics. These tools trigger alerts for our engineering team to investigate and address potential issues before customer impact.

Customers with the Premium Success package can request system availability reports on application uptime within a timeframe.

## **Support Case Reporting (Premium Success)**

With Premium Success, you will receive reports monthly on the cases submitted to our support team by your organization. Our team will share the following details.

- First response times
- Time to resolution
- Trends in volume and case categorization
- Suggestions for improvement based on trends

Your Customer Success Manager will use this information during quarterly business reviews to drive discussions on optimizing the solution and additional training tools to share with your organization.

## **Test Environment Refreshes**

Our team will create a test environment with your production data for you and your team to use for training or testing if you want to implement a change to your software. With standard support, you will have two (2) of these yearly.

Premium Success customers will receive up to eight (8) new instances per year. Our success team will also load your actual schedule and leaves for the current quarter so you can accurately test against real data.

## **Adoption Metrics and Analysis (Premium Success)**

Your Customer Success Manager will send detailed monthly reports on usage metrics by schedulers and employees. Our team will share trend analysis and guidance on increasing user adoption to help your entire organization realize the benefits of the Shiftboard solution. We will discuss the trends during our quarterly health checks.

## **Quarterly Health Checks (Premium Success)**

Your Customer Success Manager will hold quarterly calls with your Shiftboard administrators to review the use and effectiveness of the platform. We will share a trend analysis of your scheduler and employee usage metrics. We will discuss product enhancements and recommendations based on our knowledge of your business. We will leverage support case analysis to drive optimization conversations and use training materials to help address thematic topics received by our support team while sharing industry best practices.

## **Product Feedback Sessions (Premium Success)**

We will invite you to meetings with our product team biannually to gather your organization's feedback on the product. During these two-hour sessions, we will share our product roadmap and ask for your specific use cases and how you might utilize the features.

## Online Training Collateral

Shiftboard has online training materials available for [ScheduleFlex](#) and [SchedulePro](#). Help documentation, including Quick Guides and FAQs, can be accessed right from each product. We also offer unlimited access to our online learning catalog to assist with onboarding new employees or upskilling existing staff.

## Supplemental Training Sessions (Premium Success)

Our team will conduct one training session with your scheduling team annually. The session can supplement online training for schedulers or serve as a general training refresher for existing workflows. The training will cover a subset of workflows, rules, and features in current use as agreed with your Customer Success Manager.