

## PLANVIEW® PLATINUM SERVICE PROGRAM

### Premium Customer Service and Access to Exclusive Benefits

#### Maximize the Value of Your Planview Investment

Meet the changing needs of your dynamic business and receive the highest level of support combined with an assortment of value-added services and member discounts with the Planview Platinum Service Program.

**Premium Customer Care** – Platinum members are assigned a Customer Care Manager who focuses on providing insight into priority tickets and issue resolution. The Customer Care Manager will provide insight into your environment and software use and serves as an advocate for priority requirements or issues. Benefit from regularly scheduled account reviews and ticket status reporting with 24/7 access to Customer Care for urgent incidents.

**Customer Relationship Management** – Planview will assign your organization a Customer Relationship Manager (CRM) who serves as the primary point of contact to navigate Planview, provides strategic account planning, and helps prioritize needs. As an added benefit, Platinum members are assigned a Planview Executive Sponsor who regularly meets with his/her counterpart to ensure everything is kept on track, respective teams are aligned, and business value is ultimately achieved.

*“Our CRM is another voice for us. He gets us in front of the right people and he engages quickly to resolve issues. It has been nice receiving support from someone of his caliber and just having him there to bounce ideas off of has been very beneficial.” Jerry Dulaney, Director, Global Support Services and IT Project Management at Ashley Furniture Industries, Inc.*

#### Exclusive Remote Services –

- **Remote Advisory Service (RAS):** Receive 20 hours of one-on-one remote consulting services that align support activities with Planview Consulting for a cost effective approach that meets your business needs. Get advice from Planview Subject Matter Experts (SME) from Consulting, Application Support, Solution Consulting, and Development.
- **Remote Technical Migration Service:** Platinum on-premise customers receive up to two days of remote (or on-site) migration installation services delivered in a single engagement. Platinum Software-as-a-Service (SaaS) customers receive an extended testing period in the migrated environment.
- **Remote Education Service:** Take advantage of an annual planning session with a Planview Education or Training SME. Together, we analyze your company’s current and future needs and provide recommendations for an organizational education plan. At the same time, Platinum members benefit from weekly PRISMS® Live interactive online classes on a number of popular topics.
- **Remote Assessments:** Receive a migration review to help stakeholders understand the benefits of new software releases, implementation considerations, and risk analysis. The migration consultant will provide a migration assessment summary with recommendations and outcomes.

#### Planview Platinum Service Program

Planview Platinum Service Program offers the highest level of customer support and a variety of value-added services to ensure your success with the flexibility needed to meet changing business demands.

To learn more email: [market@planview.com](mailto:market@planview.com)

#### Platinum Member Benefits

- Customer Care Manager assigned to review tickets and keep you informed on priority requests
- Exclusive relationship with a Planview Executive Sponsor with a focus on business alignment
- Access to Planview experts across the organization
- Flexible Remote Services to meet your business needs
- Inside access to Planview products and a early review of the product roadmap
- First-class offers and member discounts

Platinum members also receive an annual session with a Planview Technical SME to review current system state, performance improvement opportunities, capacity planning, and more.

***“Platinum support has proven indispensable, particularly for the first couple years with the products. We have been able to support rapid progress and product configuration evolution by leveraging the services provided by Platinum.” Larry Rutherford Director of Process Engineering, Tribune Technology Division, Tribune Company.***

**Inside Access to Planview Products** – As a Platinum member you receive exclusive product roadmap briefings conducted by Planview Product Management throughout the year. Benefit from:

- **Product Inner Circle** – Receive priority access to participate in a voice of the customer program driven by Product Management that gives customers the opportunity to provide feedback, brainstorm, collaborate and prioritize key features for major releases. Customers participate in sprint demos and Inner Circle meetings throughout the development lifecycle.
- **Key Enhancement Submission Review** – Work with Planview Product Management to review the customer’s highest-priority product enhancements.
- **Platinum Executive Briefing at Planview Horizons** – Meet with your assigned Planview Executive Sponsor and examine relationship objectives and align them with your corporate priorities and future strategies during the annual Horizons User Conference
- **Agile Development Methods Session** – Benefit from an educational session around Planview’s own use of Agile including internal strategies and best practices.
- **Inside Access to Product Roadmap** – Get a first look at the latest Planview Enterprise software release featuring new functionality and benefits.

**Platinum Exclusive Offers** -- Platinum members can take advantage of valuable offers and discounts including:

- Two complimentary passes to the Planview Horizons User Conference
- Priority registration for Meet the Experts at Planview Horizons User Conference
- Discount on Planview PRISMS Best Practices and PRISMS E-Learning programs
- Remote Advisory Service discount for eight-hour blocks procured in addition to the hours included per Platinum subscription year
- Discount on Planview Austin-based training classes

#### Get Started

To participate in the Platinum Services Program email [market@planview.com](mailto:market@planview.com).



For more than 20 years, Planview has been advancing the discipline of portfolio management, helping our customers change the way they manage people and money to make better business decisions. With a singular focus on portfolio management, Planview is the only company that combines customer-driven software, unmatched domain expertise, and proven best practices to solve each customer’s unique business problems. For more information, visit [www.planview.com](http://www.planview.com).

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