



Reference Document for Parties Interested in Entering into White Label Relationships

Note: Cisco is providing this document as a reference for parties entering into White Label (WL) relationships, and it should be used for reference only. This is not a legal document and shall not be applied as the governing document between the parties.

All items referenced in this document are recommendations, but the governing contract between WL Producer and the other party shall be negotiated, drafted, and signed according to the in-house legal procedures set forth by both parties.

Table of Contents

Sample: Responsibilities of the Parties	3
Transition Management	3
Incident Management	4
Problem Management	7
Change, Release, and Configuration Management	9
Service Level Management	13
Operations Review	14

Sample: Responsibilities of the Parties

Responsibilities of the parties. This sample exhibit outlines a sample breakdown of each party's responsibilities in connection with major project activities.

Transition Management

White Label Producer Responsibilities	White Label Marketer Responsibilities
<ul style="list-style-type: none"> • Audit and accept customer order. • Provide project management for implementation services delivered by the WL Producer. • Conduct a kickoff meeting to review: <ul style="list-style-type: none"> o Customer environment o Project deliverables o Special project considerations and transition management strategies o Initial project timelines for new deployments • Designate a single point of contact (POC) to act as the primary technical interface. • Coordinate, schedule, and execute the customer project kickoff meeting: <ul style="list-style-type: none"> o Identify WL Producer project contacts. o Review roles and responsibilities of WL Producer and customer contacts. o Review the managed services purchased and support entitlements, as indicated on the customer order. o Review the service activation requirements and the key information critical to success for transition management. o Align WL Producer and customer on all major activities, risks, and milestones during the transition management phase. o Develop a project plan for subsequent steps with distribution to project contacts. • Conduct a remote training session: <ul style="list-style-type: none"> o Provide service documentation. o Review: <ul style="list-style-type: none"> • Support services to be delivered • Processes for obtaining service • Service escalation process • Change control policies • How to submit change requests • Standard reports o Explain service delivery checkpoint meetings. • Submit customer acceptance document to customer for approval of service activation. • Transition from transition management to service delivery phase. 	<ul style="list-style-type: none"> • Audit customer order for accuracy in accordance with standard Cisco pricing policies and service definition. • Process customer order to Cisco. • Process customer order to WL producer. • Participate in kickoff and scheduled meetings, and act as single point of contact for account escalations. • Provide best effort to ensure timely completion of the service activation with customer. • Designate a single point of contact (POC) to act as the primary business interface to WL Producer and customer. • Work with customer or channel partner with respect to meeting customer responsibilities specified in service description. • Coordinate with WL Producer service activation team as necessary to ensure initiation of services. • Provide Cisco support contracts detail for managed systems to facilitate access to Cisco Technical Assistance Center (TAC) services for hardware and software support. • Provide project management oversight to ensure that tasks for initial activation and any subsequent projects are implemented.

Incident Management

White Label Producer Responsibilities

Monitoring

- o Monitor managed systems.
- o Detect incidents or data indicating that a service-impacting performance threshold has been exceeded.
- o Capture incident and correlation data, enrich the data with relevant device information, and create an incident ticket.
- o Send automated e-notifications as defined in the service activation meeting to:
 - WL Producer contacts
 - Customer contacts (if desired)

Incident Notification

The customer notification informs the customer that an incident has been recorded and updates the customer as the incident transitions through the various stages of the incident management process. WL Producer uses four communications media to notify customers:

- Electronic mail
- Pager or cellular phone
- Telephone
- Web portal

Incident Classification

The incident is classified according to its impact on the business (its size, scope, and complexity) and its urgency to the business (the speed required to resolve it). Priority is automatically set as a function of impact and urgency.

		IMPACT			
		Widespread	Large	Localized	Individualized
URGENCY	Critical	Critical	Critical	High	High
	High	Critical	High	High	Medium
	Medium	High	Medium	Medium	Medium
	Low	Low	Low	Low	Low

Impact Definitions

Impact is a measure of how critical an incident or problem is to the business, and is often equal to the extent to which an incident leads to degradation of a service running on the network. WL Producer shall allow customers to specify the impact for each managed component during transition management. There are four impact levels:

1. Widespread: The entire network is affected (more than three-quarters of individuals, sites, or devices)
2. Large: Multiple sites are affected (between one-half and three-quarters of individuals, sites, or devices)
3. Localized: A single site and/or multiple users are affected (between one-quarter and one-half of individuals, sites, or devices)

White Label Marketer Responsibilities

- A Customer Relationship Manager (CRM) shall act as an escalation point within the company and within the end-customer's service organization.
- Coordinate with WL Producer for change requests (moves, adds, changes, and deletes).
- Perform quality review to ensure consistency with standards.
- Coordinate and provide oversight of service improvement plans on an as-needed basis with WL Producer.
- Build strong communication ties with customer and WL Producer at all levels (management and technical staff).
- Ensure that any service delivery-related issues are addressed and communicated as appropriate.
- Ensure that all deliverables and milestones as specified in the service description are met.
- Assume responsibility for customer satisfaction from a service delivery perspective.

Incident Management (continued)

White Label Producer Responsibilities	White Label Marketer Responsibilities
<p>4. Individualized: A single user is affected (less than one-quarter of individuals, sites, or devices)</p> <p>Urgency Definitions Urgency describes the necessary speed of solving an incident. For all incidents originated from incident monitoring, the urgency is initially set based on the alarm type that generates the incident, but it may be overridden by a customer based on the customer's perception of the incident's financial impact, business function degradation, or negative impact on their own customer commitments. The urgency of incidents generated from service requests is always set by the customer. There are four levels of urgency:</p> <p>1. Critical</p> <ul style="list-style-type: none"> • Primary business function is stopped (no backup or redundancy) • There is an immediate significant financial impact • Customer perceives the issue as Priority 1 • WL Producer and customer will commit any necessary resources 24x7 to resolve the situation <p>2. High</p> <ul style="list-style-type: none"> • Primary business function is severely degraded or supported by backup or redundant system • There is a probable significant financial impact • Customer perceives the issue as Priority 2 • WL Producer and customer will commit any necessary resources during normal business hours to resolve the situation <p>3. Medium</p> <ul style="list-style-type: none"> • Noncritical business function is stopped or severely degraded • There is a possible financial impact • Customer perceives the issue as Priority 3 • WL Producer and customer are willing to commit resources during normal business hours to restore services to satisfactory levels <p>4. Low</p> <ul style="list-style-type: none"> • Noncritical business function is degraded • There is little or no financial impact • Customer perceives the issue as Priority 4 or below • WL Producer and customer are willing to commit resources during normal business hours within X days to restore services to satisfactory levels 	

Incident Management (continued)

White Label Producer Responsibilities	White Label Marketer Responsibilities
<p>Priority Definitions</p> <p>Priority defines the level of effort that will be expended by WL Producer and the customer to resolve the incident.</p> <p>WL Producer incident management priorities are defined as follows:</p> <p>Priority 1: Critical—WL Producer and the customer will commit any necessary resources 24x7 to resolve the situation.</p> <p>Priority 2: High—WL Producer and the customer will commit full-time resources during standard business hours to resolve the situation.</p> <p>Priority 3: Medium—WL Producer and the customer are willing to commit resources during standard business hours to restore service to satisfactory levels.</p> <p>Priority 4: Low—WL Producer and the customer are willing to commit resources during standard business hours to provide information or assistance.</p> <p>WL Producer will downgrade the case priority in accordance with reduced severity of impact or incident resolution. The case may be left open for a prescribed period while operational stability is being assessed.</p> <p>The incident ticket will be closed upon validation of issue remediation and the system's return to operational stability.</p> <p>Complete ticket detail resides in a knowledge base that is used to support the incident management and problem management processes.</p> <p>Incident Resolution</p> <ul style="list-style-type: none"> • WL Producer will use incident remediation procedures to collect any additional data required to diagnose and match to known errors in our knowledge base. • WL Producer Level I and II personnel will use incident remediation procedures and work to restore services within agreed service levels, initiating change management procedures as needed for restoration. • WL Producer will coordinate the dispatch of support personnel to the customer premises to perform necessary onsite repairs as per the end-customer maintenance and support contracts. Work with onsite personnel as needed to facilitate service restoration. • WL Producer will remotely facilitate hardware replacement and software updates determined to be required by the WL Producer's service center. <p>Standard Reports</p> <p>WL Producer shall provide the customer with standard reports accessible via a web portal. Standard reports should be defined by the WL Producer, WL Marketer, and customer.</p>	

Problem Management

White Label Producer Responsibilities	White Label Marketer Responsibilities
<p>Conduct problem management activities per the following:</p> <p>Problem management minimizes the adverse impact of incidents resulting from errors in managed components by delivering a systematic approach for diagnosing the root causes of incidents and preventing their reoccurrence by recommending the elimination of the underlying errors whenever possible. Problem management is primarily a WL Producer internal process aimed at supporting and improving other service support processes.</p> <p>There are two major types of problem management activities: proactive and reactive. Reactive problem management describes the problem management processes that primarily support incident management. These processes are initiated when an incident cannot be matched to a known error. A problem is declared for the purpose of tracking the activities that lead to identifying a root cause and a resolution to the incident's underlying error. The process concludes when a known error, including its root cause and resolution, has been identified and recorded in the known error database. The known error will then be used to resolve and close all associated open and future incidents. Reactive problem management has two major subprocesses: a primary control process and an error control process.</p> <ul style="list-style-type: none"> • Primary control process: The primary output of the problem control process is the identification of a root cause for the problem. The process steps start with analyzing available data, identifying and recording problems, and classifying problems according to impact, urgency, and status. The rest of problem control involves troubleshooting and diagnosing problems to identify root causes and potential workarounds. • Error control process: Error control takes over from problem control when the root cause of a problem has been identified. First, a known error is identified and recorded based on the root cause of the problem. Next, the error is assessed to determine potential resolutions, which can include both temporary workarounds as well as permanent fixes. If a permanent fix is possible and cost-justifiable, a recommendation will be made to the customer to correct the error by initiating an included change or elective change, as the case may require, via the change management process. The final step and major output of the error control process is to document the resolutions in the known error database so that the remediation procedure can be used by incident management. 	

Problem Management (continued)

White Label Producer Responsibilities	White Label Marketer Responsibilities
<p>Proactive problem management prevents the occurrence or limits the adverse impact of future incidents in two ways:</p> <ul style="list-style-type: none"> • Periodic reviews of the customer network are conducted to identify potential error conditions that can be corrected before incidents occur. When these conditions are identified, the change management process (for conditions with known errors) or the problem control process (for conditions that require further evaluation) is initiated. • Periodic reviews of incidents, problems, known errors, and the incident management process are conducted to improve the efficiency and effectiveness of the WL Producer service center in responding to customer incidents. These activities can include major problem reviews in which the processing of Priority 1 incidents is reviewed to identify opportunities for process improvement. Other activities include reviewing past incidents and problems with the goal of updating the known error database and improving remediation procedures. <p>WL Producer will conduct proactive problem management activities at its sole discretion to improve the results of the incident management process.</p>	

Change, Release, and Configuration Management

Change management is the set of processes by which WL Producer recommends, evaluates, approves, and coordinates the introduction of change into managed components.

Release management is the set of processes by which approved changes are designed, tested, and ultimately released into the production environment.

Configuration management is the set of processes by which WL Producer keeps current a definitive store of record of data relating to the managed components that are required for delivery of managed services. WL Producer's store of record data is limited to current Cisco IOS® Software releases.

Change, release, and configuration management is a tightly integrated set of processes due to the interdependence of their process activities. The evaluation of a proposed change is strongly dependent on accurate configuration data. Approved changes are executed via the release management process, which is also strongly dependent on accurate configuration data for design and testing activities. Configuration management activities must be invoked whenever changes are released, to keep configuration data accurate.

White Label Producer Responsibilities	White Label Marketer Responsibilities
<p>Change Management The purpose of the change management process is to ensure that changes to managed components are evaluated, coordinated, and communicated to all affected parties to minimize the negative impacts of the change to managed services.</p> <p>Changes can be recommended based on the results of a variety of WL Producer processes. Incident management will often result in a remediation procedure that requires a change. Problem management may result in a known error whose permanent resolution requires a change.</p> <p>Changes are always requested by customers submitting a change request. Changes fall into two categories: standard change and elective change.</p> <p>Standard Changes A Standard change is a change recommended by the WL Producer or WL Marketer, often as a result of WL Producer incident management and problem management processes or field notifications.</p> <ul style="list-style-type: none"> • Incidents will result in the creation of an incident trouble ticket, which will initiate the request for change process when WL Producer deems it is required to resolve the incident. • Problems, much like incidents, will result in the creation of incident trouble tickets. However, WL Producer's changes initiated as a result of a problem will also be documented in the problem management knowledge base for future use. • Field notifications identify a known issue and define a remediation to resolve the issue. 	<p>A requested change will occur as a result of changes to the end user contract. Changes such as adding managed components, deleting managed components, or other similar requests will require the creation of a trouble ticket categorized as a change request.</p> <p>WL Marketer will also:</p> <ul style="list-style-type: none"> • Attend customer change management and control meetings. • Assess proposed changes the customer is considering and assess the impact on operations and their entitlements under their contract. • Communicate changes to WL Producer and affected parties.

Change, Release, and Configuration Management (continued)

White Label Producer Responsibilities	White Label Marketer Responsibilities
<p>Elective Changes</p> <p>An elective change is requested by the customer and is often the result of a change in the customer network, the customer’s business processes, or the business. Elective changes are not the result of WL Producer’s incident management or change management processes.</p> <p>Elective changes are scheduled services that the customer must request in advance of service delivery. Elective change service delivery response is defined in the “Service Level Management” section of this agreement.</p> <p>WL Producer’s available elective changes are to be itemized. WL Producer may elect to offer additional services within its areas of competency in response to a customer’s request for service.</p> <p>Customers must purchase elective change hours in order to be entitled to these services. The number of hours purchased may vary by contract. The customer must have a sufficient balance of hours on account to cover their requested change based on WL Producer’s time estimations.</p> <p>Elective change hours are debited from the customer’s block of hour (BoH) account balance as delivered, per the following:</p> <ul style="list-style-type: none"> • All elective change requests will require a minimum charge of 0.5 hour. Billing will be charged in 0.5-hour increments thereafter. • WL Producer’s priority handling of urgent elective change requests is on an as-available basis. WL Producer will make its best effort to respond to such requests. If a priority handling request is accepted, it will be charged as a minimum of 2 hours. Billing will then be charged in 0.5-hour increments thereafter. • Customer elective change requests for which the requested time of service delivery is outside of WL Producer’s normal business hours (Monday through Friday, 8 a.m. to 5 p.m.) will be billed at a rate of 1.2 times the standard rate if the time is accepted by the WL Producer. Change requests to be delivered on holidays observed by the WL Producer will be billed at 2 times the rate if the change time is accepted by the WL Producer. • During the change process, the customer is required to have an authorized onsite representative available to assist as required. <p>WL Producer shall provide a monthly elective change hour report to identify the hours used by the customer for the previous month and year to date.</p> <p>WL Producer shall provide the customer with the option to purchase additional elective change hours as needed. Minimum hour purchase blocks may apply.</p>	

Change, Release, and Configuration Management (continued)

White Label Producer Responsibilities	White Label Marketer Responsibilities
<p>Patch Management</p> <p>Changes that require the application of a “patch” are at the discretion of WL Producer. Patches will be evaluated to ensure that the stability of the current environment is maintained.</p> <p>Patches to remediate an incident or problem are handled as a standard change. Patches that are requested by the customer for the purpose of obtaining additional features or functions are considered discretionary and must be handled as an elective change.</p> <p>As part of the patch process, WL Producer will:</p> <ul style="list-style-type: none"> • Review field notifications to determine the impact and urgency to the customer system and existing software levels. • Apply remote service pack updates to the managed components’ operating system, system software, and applications. • Apply remote bug fixes to the managed components’ operating system, system software, and applications. • Perform a remote software levels audit to verify that the services are running the most current releases and are patched based on vendor best practices. This is a quarterly audit. • Provide a report covering the following details of the audit: site name, server name, IP address, OS release, OS patch #, audit work ticket, and number of hours spent on ticket. • Provide a patch management report to CRMs, Service Account Managers (SAMs), and customers identifying the field notification from vendor and which field notices were implemented in the customer system, and provide a brief explanation as to why/why not, identify the work ticket associate with the change, date change completed, and number of hours to complete the work ticket. 	
<p>Coordinating and Planning</p> <p>The WL Producer provides an application for submitting change requests for standard and elective changes to the WL Producer’s service center. Change requests may also be submitted by telephone or email, or by opening a case and assigning it to the support center. WL Producer personnel will utilize the scheduled outage as applicable to include suppression of events during a change window. Approved changes will be coordinated, planned, and monitored. This will allow coordination of activities to determine how to schedule activities to minimize negative impact.</p> <p>Once a standard or elective change has been released and the configuration data has been updated, the change will be evaluated to determine the level of success in meeting the goals of the change. This evaluation is used to improve the change management process for future changes. The designated engineer will ensure that all relevant stakeholders, including the customer, have been notified that the change is complete. Once evaluation and notification have been completed, the change is closed.</p>	

Change, Release, and Configuration Management (continued)

White Label Producer Responsibilities	White Label Marketer Responsibilities
<p>Release Management</p> <p>Release management is focused on the actual implementation of approved changes. To minimize the risks of adverse impact of any change, all releases are tested. If required because of the nature of the change, a test plan is developed and, whenever possible, a simulated environment is used to evaluate the impact of the change. Upon successful release validation, the test results are submitted to change management for approval to execute the change.</p> <p>Rollout planning includes planning the details involved in executing the change into the production environment. This includes setting the detailed timetable, including securing a customer change window if necessary, identifying and communicating to all stakeholders that need to be notified, and coordinating with customer change procedures.</p> <p>Execution is the act of introducing the change into the production environment. Once the change has been executed, configuration management is initiated to record the changes to all affected configuration Items.</p>	
<p>Configuration Management</p> <p>WL Producer shall maintain an inventory of the managed components to deliver managed services.</p> <p>This inventory is made up of configuration data, including certain inventory details of managed components and the levels of service applied to each managed component.</p> <p>WL Producer shall perform a backup process for devices running Cisco IOS Software. This includes definition and execution of service restoration process for managed components.</p> <p>WL Producer shall provide leading best practice recommendations to customer in support of their backup of unified communications servers. This includes providing scheduling recommendations for performing backups.</p> <p>WL Producer shall monitor the availability for the backup service executable (.exe) on managed unified communications servers.</p>	

Service Level Management

White Label Producer Responsibilities

Incident Management

WL Producer internally manages the service to the following service-level agreements (SLAs):

Mean time to notify: WL Producer will notify customer by email or other prearranged electronic means within 15 minutes of a monitored event that produces a trouble ticket. Upon notification, the customer can access the detail associated with the ticket and its resolution process by accessing the web portal.

Mean time to repair: WL Producer shall restore services to the previous known working configuration as follows:

- Priority 1: 4 hours
- Priority 2: 24 hours
- Priority 3: 2 business days
- Priority 4: 5 business days

SLA terms exclude the following:

- Delays caused by the customer in resolving the qualifying issue.
- Delays caused by third-party companies in resolving the qualifying issue. Third-party companies develop or provide maintenance services for non Cisco components or software.
- Issues related to telecommunications, carrier, or power.
- Issues related to third-party maintenance providers, including third-party dispatched on-site maintenance providers.
- Customer policies or procedures that prevent WL Producer from having access to managed devices.
- Issues related to manufacturer software.
- Preexisting conditions.
- Issues caused by the customer or customer assignee.

Change Management

The WL Producer shall send an email notification acknowledging the receipt of a change request within 15 minutes of receiving it via email.

The delivery response times for standard and elective changes are as follows:

WL Producer's Estimated Time Duration to Perform Change Request	Time to Completion from Receipt of Change Request
< 2 hours	Next business day
2 to 4 hours	Second business day
> 4 hours	Scheduled service

Business days are Monday through Friday, excluding holidays observed by the WL Producer.

White Label Marketer Responsibilities

From a continuous improvement perspective, monthly service reviews occur internally and include sales, marketing, and operations to ensure a consistent view of managed services throughout the organization. The purpose of internal service monitoring is to ensure a prompt response to breaches in service levels so that WL Producer can initiate a plan of action in advance of customer inquiries.

There are two types of internal service reporting:

- Operational reports, occurring daily (or more frequently) to identify service issues in areas supported by the service desk, incident management, problem management, and change management.
- Periodic reports, circulated a few days in advance of monthly reviews to answer questions or resolve disagreements prior to monthly service reviews.

Operations Review

White Label Producer Responsibilities	White Label Marketer Responsibilities
<p>Provide ticket, availability, operational, and performance reports in support of the monthly and annual reviews.</p> <p>WL Producer shall review and interpret the reports to identify trends and possible remediations.</p> <p>WL Producer shall be available to attend the monthly and annual reviews, either in person at the customer site or via a conference call.</p>	<p>Schedule monthly, quarterly, and annual service reviews.</p> <p>Gather and track the ticket data and generate ticket reports. The ticket information is reviewed remotely on a monthly basis in the service level management monthly review meeting with the customer.</p> <p>Monthly reviews also verify any SLA requirements and provide general network performance reporting suitable and available for trending and analysis.</p> <p>The annual business review meeting is an in-person, interactive session that reviews the trends over the past year and discusses the service plan for the next year of service.</p>