



Customer Success Portfolio

Detailed SKU Descriptions



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Product Description: Customer Success Portfolio

Bundled Portfolio Offerings

Below is a guide to the various Customer Success Portfolio “Bundle” (each a “CSD SKU”) that entitle a Customer specific components, services and other inclusions for its purchased Bundle Level to **further** support the Customer’s deployment and use of SaaS Services during the period identified on the applicable Quote for the Customer’s CSD SKU in the “Term Months” column of the Product Table (such period, the Customer’s “CSP Bundle Term”).

Silver Bundle (CSD-SP-SILVER)

The Silver Bundle includes the following items available to Customer each year of the CSP Bundle Term, with details described below:

- Ask an Architect sessions - Up to 40 one-hour sessions per year
- “Ask the Expert” Office Hours and Content Hub
- Identity University – eLearning for 2 students
- Product Roadmap Webinars
- Tenant Connectivity Validation for Identity Security Cloud
- Unlimited Rule Reviews

Gold Bundle (CSD-SP-GOLD)

The Gold Bundle includes the following items available to Customer each year of the CSP Bundle Term, with details described below:

- Ask an Architect sessions - Up to 60 one-hour sessions per year
- “Ask the Expert” Office Hours and Content Hub
- Feature Adoption Workshop (1)
- Identity University – eLearning for 4 students
- Identity University: Skilled Session Pass (1)
- Maturity Benchmarking (1)
- Navigate Conference Pass (1)
- Priority Case Queuing
- Product Roadmap Webinars
- Project Reviews (1)
- Tenant Connectivity Validation for Identity Security Cloud
- Unlimited Rule Reviews



Platinum Bundle (CSD-SP-PLATINUM)

The Platinum Bundle includes the following items available to Customer each year of the CSP Bundle Term, with details described below:

- Ask an Architect sessions - Up to 80 one-hour sessions per year
- "Ask the Expert" Office Hours and Content Hub
- Certification Exams and Prep Resources (10 exams)
- Defect Prioritization
- Designated Platinum Support Team
- Expanded Support Coverage for Priority 2 issues
- Expert Services Assistance with Support Maintenance Items
- Feature Adoption Workshop (2)
- Go-Live Support (1)
- Identity CheckUP (1)
- Identity University – eLearning for 10 students
- Identity University: Skilled Session Passes (2)
- Maturity Benchmarking (2)
- Navigate Conference Passes (2)
- Priority Case Queuing
- Proactive Rule Diagnostics (12)
- Product Roadmap Webinars
- Project Reviews (2)
- Technical Account Manager
- Tenant Connectivity Validation for Identity Security Cloud
- Unlimited Rule Reviews

Bundle Component Details

Ask an Architect Sessions

Applies to Silver, Gold, and Platinum Bundles

- **Silver – up to 40 one-hour sessions per year**
- **Gold – up to 60 one-hour sessions per year**
- **Platinum – up to 80 one-hour sessions per year**

Ask the Architect sessions provide Customers with up to the specified number of one-hour consultation sessions for various activities, excluding hands-on implementation or remediation work. These sessions are designed for:

- Root-cause Analysis
- How-to advising
- Product Q&A
- Rule configuration assistance
- Documentation review
- Mentoring and Customer-specific coaching

Multiple one-hour sessions may be worked back-to-back for issues requiring additional time or to address multiple issues. Sessions may be used by SailPoint resources to research offline either before or after scheduled live sessions and will be deducted in one-hour increments.

Hands on implementation and remediation work is not included. A separate statement of work is required for any implementation or remediation work.

Requests for Architect sessions will be submitted by Customer through the SailPoint Customer portal and will be scheduled at a time mutually agreed upon by the Customer and SailPoint resource. Scheduled sessions canceled by Customer with fewer than 24-hour notice will be deducted from the Customer session balance.

Ask the Expert Office Hours and Content Hub

Applies to Silver, Gold, and Platinum Bundles

Ask the Expert Office Hours are hosted virtually eight (8) times per calendar year by members of SailPoint's technical team. These 1-hour sessions will feature technical demos and



opportunities to ask questions. These sessions will be open to all Customers during their respective CSP Bundle Terms.

Customers will also gain access to the Ask the Expert: Content Hub, where they can find on-demand recordings of previous Office Hours as well as technical resources shared by SailPoint's experts.

Certification Exams and Prep Resources

Applies only to Platinum Bundles – 30 Training Units towards 10 certification exams per year

SailPoint offers a certification exam for identity professionals to showcase their knowledge of identity security and SailPoint products. As part of the Platinum Bundle, Customers are provided with prep resources that include access to study guides, documentation, and on-demand videos providing tips on studying and the exam process.

SailPoint will also provide 30 Training Units per year to use towards 10 SailPoint Certified IdentityNow Professional exams. Each IdentityNow Professional exam is valued at 3 Training Units. To register for the certification exam, the individual candidate will go to university.sailpoint.com and apply 3 Training Units as the form of payment. If an individual candidate registers for other certification exams that may require more than the 3 Training Units allocated as part of the Platinum Bundle, SailPoint will not issue additional Training Units to cover any shortage of exams. Customer is responsible for monitoring and tracking the distribution and usage of Training Units. As part of the Customer onboarding process, the Customer will be required to provide a Training Administrator contact, who is authorized by Customer to request Training Unit reports from SailPoint by emailing training-help@sailpoint.com. SailPoint provides no guarantee that the individual certification candidate will pass the exam. If an individual certification candidate does not pass the exam and desires to retake such exam, the retaking of such exam will require additional Training Units.

Defect Prioritization

Applies only to Platinum Bundles

SailPoint engineering will give preference to product defects impacting Platinum Bundle Customers. This does not guarantee a turnaround time for resolution of product defects.



Designated Platinum Support Team

Applies only to Platinum Bundles

Customers who purchase the Platinum Bundle will have their support issues addressed by Designated Senior Support Engineers.

Expanded Coverage for Problem Priority 2 Issues

Applies only to Platinum Bundles

Support will work Problem Priority 2 issues (as defined in the SailPoint [Support Policy](#)) 24x5 for Platinum Bundle Customers. This is available upon request only.

Expert Services Assistance with Support Maintenance Items

Applies only to Platinum Bundles

Expert Services assistance is included in the Platinum Bundle for the investigation of performance issues, configurations, and partner-written rules where possible, making for a more seamless Customer experience.

Expert Services assistance does not include Professional Services remediation and implementation work which Customer may purchase separately from this offering (if desired), and requires a separate, mutually executed statement of work.

Feature Adoption Workshop

Applies to Gold and Platinum Bundles

- **Gold – up to 1 workshop per year**
- **Platinum – up to 2 workshops per year**

Feature Adoption Workshops review progress of Customer identity program and help align Customer business objectives with SailPoint's existing solutions and future roadmap. During these workshops SailPoint will provide recommendations on what to tackle next based on program maturity and the priorities of Customer organization.

SailPoint and Customer will:

- Review the features of the Identity Security Cloud package to which Customer has subscribed



- Identify how to extract maximum value from SailPoint products
- Advise Customer on Identity roadmap, addressing priorities and quick wins tailored to Customer's organization

Pework is required by Customer with Feature Adoption Workshops to ensure alignment on strategic goals. Each Feature Adoption Workshop shall not exceed 2 hours.

Customer must submit the request for Feature Adoption Workshop to SailPoint in writing four (4) weeks prior to desired workshop date. If a request is made less than four (4) weeks in advance, SailPoint will make commercially reasonable efforts to identify a resource that can deliver the workshop but cannot guarantee a resource will be available on shorter notice.

Go-Live Support

Applies only to Platinum Bundles – 1 weekend go-live or after-hours event per year

Platinum Bundle Customers are entitled to one (1) weekend go-live or after-hours event per year of their CSP Bundle Term.

A weekend go-live or after hours event services engagement consists of two parts:

- Customer will have the ability to contact [SailPoint Support](#) for assistance on the go-live weekend or after hours event.
- SailPoint will identify a SailPoint Professional Services resource as requested by Customer. This resource will be on call in case implementation assistance is needed that cannot be provided by the SailPoint Support team.

Customer must submit the request for go-live assistance to SailPoint four (4) weeks prior to the go-live weekend or after hours event. If a request is made less than four (4) weeks in advance, SailPoint will make commercially reasonable efforts to identify a Professional Services resource that can be available to support but cannot guarantee a resource will be available on shorter notice. SailPoint will provide all assistance remotely.

Customer will provide the appropriate project delivery staff to ensure SailPoint has the resources needed to perform the services outlined below. SailPoint will provide assistance as requested within the bounds of the description set forth herein.



Weekend Go-live

- Pre-go-live meeting prior to the designated weekend, the scheduling of which will be as mutually agreed to by the parties.
- 24x7 remote assistance from Friday 6PM to Monday 8AM local time should questions/issues arise regarding the go-live
- Post-go-live meeting, the scheduling of which will be as mutually agreed to by the parties.

Customers may opt to leverage go-live support after hours on a weekday. For Customers who choose this option, 24x7 remote assistance is available from 6pm of their chosen date until 8am the following morning.

Pre-Go-Live Checkpoint Meeting

This meeting will ideally be scheduled a few days before the go-live. Topics covered will be:

- Identify tasks not completed and the associated risks
- Confirm go-live start time, estimated completion time and other key milestones
- Review weekend or after-hours process for contacting support – phone number and/or case through portal so it can be marked as critical
- Verify key contacts and communication/escalation plan
- Confirm time and call-in number for midpoint checkpoint meeting
- Verify Customer's preferred remote collaboration tool is tested and working should it be required during the go-live

Post-Go-Live Checkpoint Meeting

This meeting will review the results of the go-live plan in the Customer's production environment and validate that all tasks have been performed and signed off by the appropriate stakeholders. Customer Success Management from SailPoint will be brought in for introductions and engagement in any in-production discussions at this point as well.

Identity CheckUP

Applies only to Platinum Bundles – 1 per year

SailPoint will provide one IdentityCheckUP per year during the CSP Bundle Term for a single environment. During the Identity CheckUP SailPoint may perform some or all of the following services as applicable to Customer's implementation of IdentityNow:

- Review business needs and product concerns
- Discuss future business needs



- Review Virtual Appliance setup and configuration
- Review Aggregation Schedules and Refresh Times
- Review Identity Profile mappings and Source Configuration
- Review account correlation for sources
- Review Email Template configurations used for notifications
- Review system and aggregation logs
- Review SSO into IdentityNow (Service Provider Configuration) and Pass-Through authentication configuration
- Review configured Access Certifications in the system
- Review Password Management configuration
- Review Provisioning configuration inclusive of Lifecycle States, Access Profiles, Create Account Profiles provisioned sources, specialty rules and transforms

Completion of the Identity CheckUP requires commitment from Customer to gather the necessary data and IdentityNow metrics. This will require the assignment of appropriate personnel, time, effort, and commitment from Customer staff to facilitate project success.

At the completion of the Identity CheckUP Review, SailPoint shall provide Customer with a consolidated document which will include recommendations to improve the current implementation. The document will include the following:

- Summarize state of implementation for each area reviewed in the list above
- Provide recommended next steps to address any high priority issues discovered

Remediation and implementation work is not included in the Identity CheckUP. Customer may purchase separately from this offering if desired, and requires a separate, mutually executed statement of work.

Identity University – eLearning

Applies to Silver, Gold, and Platinum Bundles

- **Silver – 2 seats per year**
- **Gold – 4 seats per year**
- **Platinum – 10 seats per year**

Each Customer Success Portfolio bundle entitles Customer to assign the specified number of concurrent named users with unlimited access to eLearning courses in Identity University during the CSP Bundle Term. Customer may assign additional named users up to the specified number of concurrent named users for the subscription at any point during the current CSP Bundle Term. Customer may replace an already named user with a newly named user (i) for a



forthcoming year of the CSP Bundle Term by submitting a written request to SailPoint prior to the start date of the year of the CSP Bundle Term on which the change takes effect or (ii) upon written request when a named user leaves Customer's organization. As part of the Customer onboarding process, Customer will be required to provide a Training Administrator contact who is authorized by the Customer to assign and request updates to named users by email to training-help@sailpoint.com.

Identity University: Skilled Session Passes

Applies to Gold and Platinum Bundles

- **Gold – 1 pass per year**
- **Platinum – 2 passes per year**

Identity University Skilled Sessions are hosted exclusively in person at Navigate in the United States, SailPoint's annual conference, and offer a full day of training with multiple tracks covering SailPoint's newest technologies as well as foundational training curriculum relevant for any aspiring identity security expert. The sessions are led by SailPoint-certified trainers and include a mix of lectures, demos, and exercises. Attendees also receive access to additional training resources after the event on Identity University to continue their learning.

Maturity Benchmarking

Applies to Gold and Platinum Bundles

- **Gold – up to 1 review per year**
- **Platinum – up to 2 review per year**

Annual Maturity Benchmarking will provide Customer with a report showing how Customer's identity program compares to 5 peer institutions and industry standards. These reviews complement the feature adoption workshops by showing where other customers are making investments that help inform the roadmap of Customer's program.

Navigate Conference Pass

Applies to Gold and Platinum Bundles

- **Gold – 1 pass per year**
- **Platinum – 2 passes per year**



Navigate is SailPoint's annual user conference -- the forum for identity practitioners and senior decision-makers alike to get first-hand insight into "what's next" in identity security. Passes may be used for any Navigate event worldwide.

Priority Case Queuing

Applies to Gold and Platinum Bundles

SailPoint support will include a higher level of issue prioritization for Gold and Platinum Bundle Customers.

Customers are advised to prioritize their support cases to ensure they are addressed in their designated order of importance as outlined in the [Support Guide](#).

To initiate the support process, cases should be submitted through the [SailPoint Support Portal](#).

Proactive Rule Diagnostics

Applies only to Platinum Bundles – 12 reviews per year

SailPoint will run monthly rule diagnostics checks on the Customer environment and an output report will be emailed to Customer. This will scan both connector and cloud rules and evaluate them against the latest best practices. For any rules identified as out of compliance with the latest best practices, Customer will be notified of the need to remediate. Customer can remediate on their own or leverage their Ask an Architect sessions to provide guidance.

Product Roadmap Webinars

Applies to Silver, Gold, and Platinum Bundles

Product Roadmap Webinars are hosted live at various times throughout the year and are led by SailPoint's product management team. Attendees gain early access and insight on SailPoint's product vision, strategy, and new products and features on our roadmap. These webinars also provide attendees the unique opportunity to engage with SailPoint's product management team, provide feedback, and ask questions.



Project Reviews

Applies to Gold and Platinum Bundles

- **Gold – up to 1 review per year**
- **Platinum – up to 2 review per year**

Project Reviews aim to offer peer review and best practices guidance for Identity Security Cloud delivery engagements. A SailPoint Architect, seasoned in Identity Security Cloud deployments, collaborates with Customer's technical lead and project manager of the team implementing Identity Security Cloud for Customer to conduct reviews for the deployment of significant functionalities.

Examples of these reviews include:

- Requirements / Use Cases Review
- Solution Configuration Review
- Test Planning Review
- Go-live Planning Review

Gold Bundle Customers are entitled to up to one (1) review per year of their choosing. Platinum Bundle Customers are entitled to up to two (2) reviews per year of their choosing.

Customer must submit the request for Project Review to SailPoint in writing two (2) weeks prior to desired review date. If a request is made less than two (2) weeks in advance, SailPoint will make commercially reasonable efforts to identify a resource that can complete the review but cannot guarantee a resource will be available on shorter notice.

Technical Account Manager

Applies only to Platinum Bundles

SailPoint will provide a Technical Account Manager (TAM) to manage support and priority situations. The TAM will conduct regular case reviews with Customer, allowing for the identification of trends and the development of preventative measures.



Tenant Connectivity Validation for Identity Security Cloud

Applies to Silver, Gold, and Platinum Bundles

The *Tenant Connectivity Validation for Identity Security Cloud* will help Customer quickly achieve value from its investment as well as annual validation of connectivity during the CSP Bundle Term.

SailPoint will assist the Customer during initial configuration of the Virtual Appliance (also referred to as “Required Software” in some of SailPoint’s customer-facing templates and other materials). SailPoint will work with the Customer to configure the IdentityNow tenant to test connectivity, including the Virtual Appliance, by connecting to 2 data sources, one of which should be on-premises:

- One authoritative source
- One authentication source.

SailPoint will also work with the Customer to setup the basic configuration in IdentityNow required to test the subsequent configuration of IdentityAI, which includes:

- Configuration of an identity profile containing the 5 default attributes plus manager
- Configuration of lifecycle states active & inactive
- Deployment from the Sandbox tenant to the Production tenant
- Confirm data is aggregating from the 2 data sources configured

For a Customer purchasing one or more IdentityAI modules as part of its Identity Security Cloud purchase, SailPoint will configure IdentityAI to collect data from IdentityNow, configure all IdentityAI modules included in the Customer’s SaaS Services subscription, and perform a knowledge transfer session to familiarize the Customer with their use.

For a Customer purchasing CIEM as part of its Identity Security Cloud purchase, SailPoint will configure the Cloud Service Provider – either AWS, GCP, or Azure – and perform a walk-through of the CIEM module for the Customer.

Customer may choose to connect to sources and SailPoint modules at the same time or at different times based on a Customer’s objectives; for example, Customer may choose to connect to Virtual Appliance and on-premises source in Year 1, IdentityAI in Year 2, and CIEM in Year 3 of the Customer’s CSP Bundle Term.

Following the initial setup of these modules, SailPoint will validate these connections on an annual basis. This may require coordination with Customer resources.



Connector rules and custom connectors are out of scope for Tenant Connectivity Validation during initial configuration. During subsequent annual validations, if any connectivity issues are identified by SailPoint with custom connectors or connectors using rules, SailPoint will report those issues to the Customer but will require the use of Ask an Architect sessions (or Professional Services hours) to diagnose the cause.

Tenant Connectivity is not a replacement for implementation services but is intended to provide a foundation on which to implement Identity Security Cloud. As part of Tenant Connectivity, SailPoint will not perform any implementation activities outside the scope described herein.

Unlimited Rule Reviews

Applies to Silver, Gold, and Platinum Bundles

All rules deployed in the IdentityNow cloud infrastructure (tenant) must be reviewed and deployed by the SailPoint team to be compliant with SOC and ISO guidelines. SailPoint is not responsible for the business logic or the functionality achieved by these rules as part of the Unlimited Rule Reviews portion of a Customer's Bundle. SailPoint will only provide reviews to make sure the tenant health is not compromised after deploying a cloud rule. Customers may use one or more of their Ask the Architect sessions for advice on business logic or functionality. Customer may submit an unlimited number of rules to be reviewed and deployed into their tenant at no cost during the CSP Bundle Term.

Requests for rule reviews and deploys must be submitted by Customer through the SailPoint Customer Support Portal.

General Terms applicable to Customer Success Portfolio Bundles

- SailPoint's Customer Success Delivery team will reach out to the primary Customer contact if scheduling of Customer resources is needed to complete any work related to the Customer's Bundle. It is the responsibility of Customer to provide and update key contact information to SailPoint and respond to any reminders to schedule services within the CSP Bundle Term.
- Reasonable notice is required from Customer.
- Inclusions in each Bundle are only valid during the Customer's CSP Bundle Term.
- Inclusions with annual limits in each Bundle do not carry over from year to year during the CSP Bundle Term. For example, if a Silver Customer only uses 35 of its 40 Ask an Architect access sessions during the first year of its CSP Bundle Term, the remaining 5 sessions will be forfeited and will not be carried into the second year of the same CSP Bundle Term. Customer will be entitled only up to the yearly limit of the inclusions for each year of the CSP Bundle Term.
- If Customer's CSP Bundle Term includes a partial year, the inclusions with yearly limits in each Bundle for that partial year will be determined as follows:
 - For (i) Ask an Architect sessions, (ii) Ask the Expert Office Hours, and (iii) Proactive Rule Diagnostics, the number of inclusions will be prorated based on the number of months in the partial year of Customer's CSP Bundle Term. For example, if a Silver Bundle Customer has a 39-month CSP Bundle Term, the partial year would be 3 months and Customer would be entitled to 10 Ask an Architect sessions during that partial year of CSP Bundle Term.
 - For (i) Identity CheckUP, (ii) Go-Live Support, (iii) Feature Adoption Workshops, (iv) Project Reviews, (v) Maturity Benchmarking, (vi) Identity University: Skilled Session Passes, and (vii) Navigate Conference Passes, Customer will be entitled to (a) all of these inclusions in the partial year of Customer's CSP Bundle Term if the partial year is equal to or greater than 6 months and (b) none of these inclusions in that partial year of Customer's CSP Bundle Term if the partial year is less than 6 months. For example, if a Platinum Bundle Customer has a 39-month CSP Bundle Term, the partial year would be 3 months and Customer will not be entitled to any of these inclusions during the partial year of its CSP Bundle Term, but if a Platinum Bundle Customer has a 42-month CSP Bundle Term, the partial year would be 6 months and Customer will be entitled to all of these inclusions during the partial year of Customer's CSP Bundle Term.



- All services to be provided under a Customer Success Portfolio Bundle shall consist solely of (i) SaaS Services and Required Software deployment assistance, (ii) program planning, (iii) interface adapter efforts, and/or (iv) formal or non-formal software training. SailPoint will not perform any development work, or provide custom software or works-for-hire as part of any Customer Success Portfolio Bundle.
- All services to be provided under a Customer Success Portfolio Bundle will be done remotely. These services do not include any travel or other reimbursable expenses.
- Inclusions in the bundle are subject to the terms and conditions of SailPoint's [Community Program Terms](#) and [Identity University Addendum](#), as applicable.

Following the expiration of Customer's CSP Bundle Term, Customer will not be entitled to a refund for any inclusions in Customer's purchased Customer Success Portfolio Bundle that Customer did not use in whole or in part.