

# Comodo Customer Success Operations

Professional Services  
Automation  
(User Group = ISR)

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**VERSION CONTROL**

Version Number	Date	Author	Description
1	05.14.2019	Loretta Harry	Workflow and Responsibilities for Professional Services Automation (User Group = ISR)
2	5.15.2019	Loretta Harry	Review and Revised Flow and Tasks
3	5.18.2019	Cassandra Hackett & Tami Cannizzaro	Enhanced Marketing Workflow
4	5.21.2019	Loretta Harry	Finalized Workflow and Task and Responsibilities Breakdown

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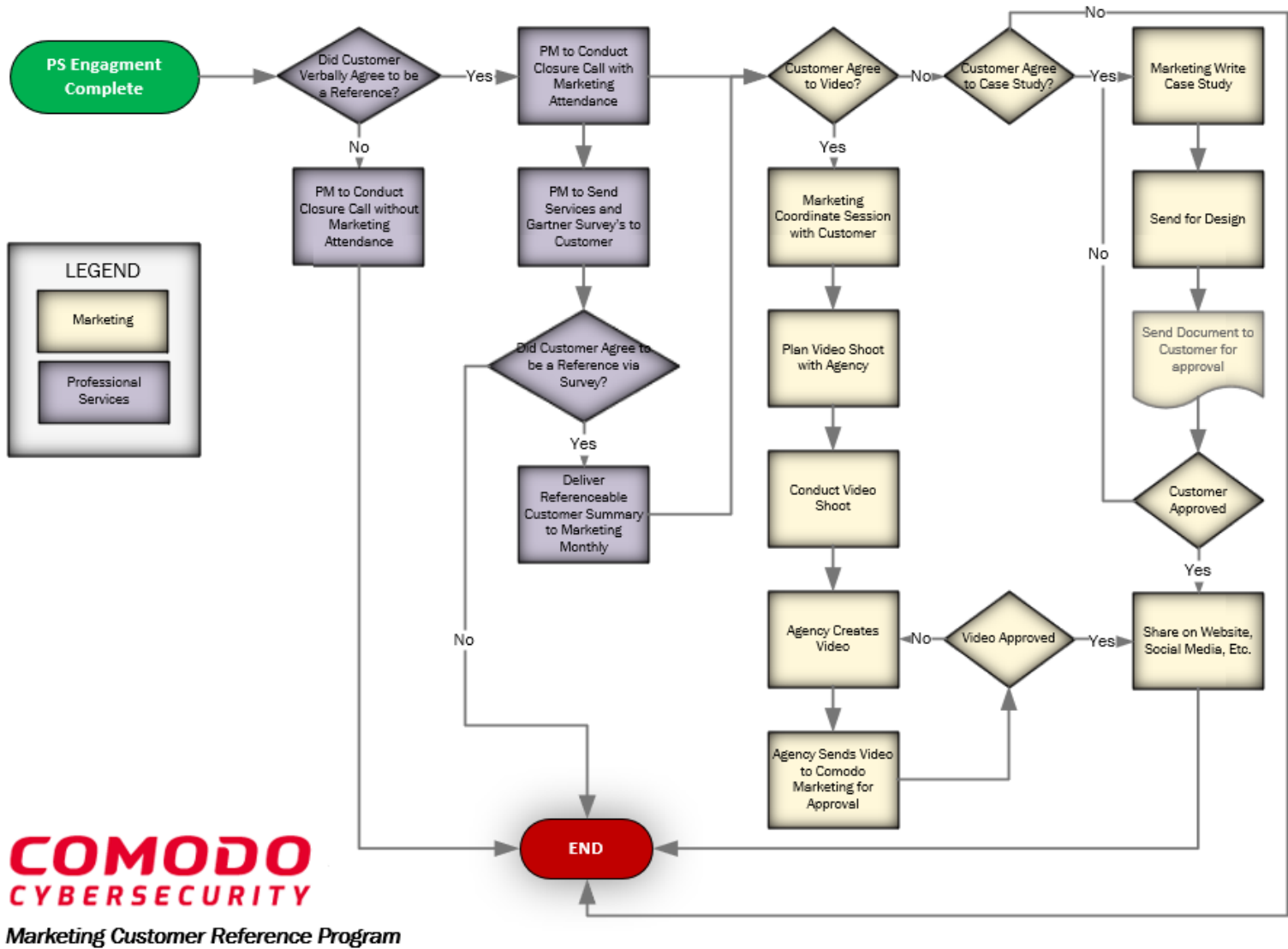
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## 1.0 Professional Services Automation (User Group = ISR)

### 1.

The Purpose of this document is to detail and outline the phases, roles, and responsibilities of Comodo's Professional Services Automation (User Group = ISR). After document review, there will be a clear understanding of the 8-phase process that encompasses the Professional Services Automation (User Group = ISR).

## 2.0 Flow Chart



## 3.0 Task and Responsibilities Breakdown

### 1. Professional Services

Task	Action
1.1	<ul style="list-style-type: none"> <li>Post Engagement, PM/PSE to inquire as to whether the customer is willing to be used as a reference.</li> <li>If yes, continue to next step.               <ul style="list-style-type: none"> <li>If no, go to step # 1.3</li> </ul> </li> </ul>
1.2	<ul style="list-style-type: none"> <li>PM to invite Marketing to join Closure Meeting in which they will leverage the first 10 minutes of the call to introduce the Marketing Reference Program.</li> </ul>
1.3	<ul style="list-style-type: none"> <li>PM to conduct Services Engagement closure call with customer.               <ul style="list-style-type: none"> <li>If Marketing does not attend, then STOP</li> </ul> </li> </ul>
1.4	<ul style="list-style-type: none"> <li>Following the Services Engagement closure call, PM is to send customer Online Gartner and Services Survey's.</li> <li>Services Survey will contain a request for customer to approve being a reference for Comodo</li> </ul>
1.5	<ul style="list-style-type: none"> <li>Customer completes and submits survey.</li> <li>If Customer commits to being a reference via survey, proceed to next step.               <ul style="list-style-type: none"> <li>If no, STOP</li> </ul> </li> </ul>
1.6	<ul style="list-style-type: none"> <li>Upon receiving survey results, PS Director to compile ongoing list of referenceable customers.</li> <li>PS Director to submit 'Referenceable Customer Report' to marketing team monthly.               <ul style="list-style-type: none"> <li>Go to Step 2.1</li> </ul> </li> </ul>

\*\*\* If no PM is assigned, PS Engineer owns the PM functions

### 2. Marketing

Task	Action
2.1	<ul style="list-style-type: none"> <li>Marketing to ask customer if they are willing to participate in Reference Video.</li> <li>If yes, continue to next step.               <ul style="list-style-type: none"> <li>If no, then go to step 2.8</li> </ul> </li> </ul>
2.2	<ul style="list-style-type: none"> <li>Marketing to coordinate video shoot with customer</li> </ul>
2.3	<ul style="list-style-type: none"> <li>Marketing to Plan Video Shoot with Agency</li> </ul>
2.4	<ul style="list-style-type: none"> <li>Marketing to Conduct Video Shoot with Customer and Agency</li> </ul>
2.5	<ul style="list-style-type: none"> <li>Agency Creates Video</li> </ul>
2.6	<ul style="list-style-type: none"> <li>Agency sends Video to Comodo for Approval               <ul style="list-style-type: none"> <li>If yes, continue to next step</li> <li>If no, go back to step 2.5</li> </ul> </li> </ul>
2.7	<ul style="list-style-type: none"> <li>Share on Website, Social Media, Etc.               <ul style="list-style-type: none"> <li>STOP</li> </ul> </li> </ul>
2.8	<ul style="list-style-type: none"> <li>Marketing to ask customer if they are willing to participate in Case Study               <ul style="list-style-type: none"> <li>If yes, continue to next step</li> <li>If no, STOP</li> </ul> </li> </ul>
2.9	<ul style="list-style-type: none"> <li>Marketing to write Case Study with Customer</li> </ul>
2.10	<ul style="list-style-type: none"> <li>Send Case Study to Marketing Design Team</li> </ul>
2.11	<ul style="list-style-type: none"> <li>Send Case Study to Customer for approval               <ul style="list-style-type: none"> <li>If yes, go to step 2.7</li> <li>If no, go to step 2.9</li> </ul> </li> </ul>