

SERVICE BRIEF

Advanced Services – Service Relationship Manager

Introduction

The ever-evolving threat landscape combined with the ongoing shortage of skilled resources and complex IT environments are making it very difficult for organizations to manage security challenges and resolve issues quickly and completely. In addition to leaving their networks and data exposed to cyber criminals, organizations are unable to meet their internal service-level objectives and external service-level agreements (SLAs).

Fortinet's Service Relationship Manager (SRM) service provides the customer with a designated service manager who is familiar with the customer's challenges, technical support history, and operational processes.

SRM Service Overview

When purchased with the Enterprise First service, the SRM service¹ will provide the benefits described in this service brief.

The key benefits of this service reduce the effort involved in maintaining operations with associated reduction in operating expenses (OpEx), increased staff productivity, reduced downtime, faster time to value, and reduced exposure to financial loss.

The SRM understands the customer challenges and objectives and will work collaboratively to oversee the service, improve operational efficiency and effectiveness, expedite problem resolution, follow up on all the service requests until closure, and identify measures to prevent future issues. The SRM service will provide a clear line of demarcation of support, allowing the TAM to fully focus on resolving technical break/fix issues while the SRM fields and facilitates all other service management, advocacy, entitlement, and proactive issues.

In addition, the SRM will act as the voice of the customer within Fortinet to provide optimum service and manage the engagement to meet a set of agreed objectives.

Key Advantages



Optimize Fortinet investment by working closely with customer executives and support teams to achieve goals and objectives.



Achieve highly available and efficient service by aligning appropriate expertise to resolve issues quickly and completely.



Secure a primary point of contact for issue resolution and escalation management and obtain insights into service performance.



Receive product life-cycle guidance and use it to ensure hardware and software are current and are able to protect against the ever-evolving threat landscape.

Activities and Deliverables

Activity	Description of SRM Responsibilities
Issue Management and Escalation Management	<ul style="list-style-type: none"> ■ Act as a primary point of contact for all customer support requirements and escalation management outside the customer's tailored technical escalation process ■ Facilitate overall service delivery, including elevating issue priorities based on customer needs ■ Coordinate across Fortinet support organization and the customer support team to resolve issues quickly and completely
Relationship Management	<ul style="list-style-type: none"> ■ Work closely with the customer's executives and support teams to optimize their Fortinet investment ■ Maintain thorough understanding of customer's business objectives and operational processes ■ As a customer advocate, capture customer concerns and work with internal Fortinet teams to resolve any issues ■ Collaborate with the customer by providing assistance and guidance with asset registration requests
Weekly Service Reviews	<ul style="list-style-type: none"> ■ Facilitate a weekly meeting to review open tickets and discuss issues or customer concerns ■ Generate focused reporting in relation to weekly service reviews and tracking of actions ■ Review of deliverables, which may include training, and other customer entitlements
Quarterly Service Reviews	<ul style="list-style-type: none"> ■ Review critical incidents, resolutions, and root cause analysis, as appropriate ■ Deliver a high-level executive summary that includes an overview of health indicators, focused analysis, and recommendations ■ Review successes, initiatives, opportunities, and challenges ■ Review of hardware and software life cycle and its impact on the customer environment ■ Provide operational recommendations and best practices to ensure our customers maximize their available proactive support options ■ Track and report on service entitlements and deliverable usage, such as training, annual software recommendation (bug scrub), upgrade assistance, and service points ■ Review CSAT results and work to resolve customer expectations and misalignment ■ Provide customer-specific product life-cycle guidance and recommendations (both hardware and software)—for example, end of sale, end of support, last firmware supported, end of engineering support—to help the customer plan for migration ■ Review progress from the last quarter and provide guidance for the next quarter

Summary

Fortinet SRMs possess a strong understanding of our customers' business objectives and manage all elements of the service relationship. This ranges from onboarding to focused support, with the goal being to assist the customer in achieving a secure and stable network environment. SRMs focus on driving business objectives by building relationships and helping reduce gaps through focused metrics reporting, chairing weekly/biweekly meetings, producing quarterly service reports and support plans, and handling escalation management. SRMs act as customer advocates alongside other Fortinet resources and provide a level of service that maximizes the value of Fortinet investment.

¹ SRM service is already included in Select, Elite, Global First, and Global Elite service offers.

