



Aberrant Open-ISM™

CUSTOMER MANAGEMENT POLICY

Property	Description
Document Version	1.0
Status	DRAFT
Last Update	2022-03-25
Document Owner	Risk Management
Next Scheduled Review	

PROPRIETARY

Document Approvals

Approver Name	Title	Date
???	???	???

Revision History

Version	Date	Description of Changes	Revised by
1.0	2022-03-25	DRAFT	Aberrant

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1 OVERVIEW

This policy provides a framework for how <<Company Name>> interfaces with customers. The purpose of this policy is to provide explicit instruction for how we manage relationship with customers.

2 CUSTOMERS

Customer satisfaction is the ultimate metric that should guide the direction of the product. Satisfying the customer is the highest priority.

2.1 ONBOARDING

Customers should be evaluated against a check-list of requirements to ensure that they are onboarded consistently.

2.1.1 CONTRACTS

Changes to commitments, requirements and responsibilities, including those relating to confidentiality, must be communicated to third parties, external users, and customers via updated agreements and website notifications.

2.1.1.1 NON-DISCLOSURE AGREEMENT (NDA)

Prior to any discussion that involves <<Company Name>> proprietary information an NDA should be in place and stored in the system.

2.1.1.2 TERMS OF SERVICE (TOS)

Terms of Service represent a legal agreement between <<Company Name>> and an entity, e.g. customer, who has purchased the <<Company Name>>'s service. The entity must agree to abide by the Terms of Service in order to use the offered service. The Terms of Service should define:

- disclaimers;
- billing;
- SLA;
- boundaries of the system and describes relevant system components;
- fair usage;
- suspension or termination of membership; and,
- system commitments.

2.1.1.3 MASTER SERVICE AGREEMENT (MSA)

Commitments to the customer, requirements, and responsibilities are outlined and communicated through master service agreements (MSA). The MSA should delineate:

- boundaries of the system and describes relevant system components;
- communicates the system commitments and requirements of third parties;
- copyrights and intellectual property;
- warranties and limitations of liability;
- mutual indemnification;
- outlines and communicates the terms, conditions and responsibilities, including those relating to confidentiality; and,
- address general requirements such as termination, “Force Majeure”, etc.

2.2 OFFBOARDING

Customers should be evaluated against a check-list of requirements to ensure that they are offboarded consistently.

2.3 SERVICE LEVEL AGREEMENT

Customers can view uptime and downtime notifications via a portal.
Create a portal that allows customers to view uptime.

2.4 CUSTOMER COMMUNICATION

Communication with customers should be highly structured so that customers have an unambiguous channel to communicate with <<Company Name>>. <<Company Name>>'s communication should be structured into three tiers:

Communication Tier	Description
Tier 1: Broadcast	Information that can be broadcast to customers, e.g. downtime, new features, etc.
Tier 2: Support	Issues that require direct communication with a designated contact: e.g. support, billing, etc.
Tier 3: Escalation	Issues that require access to <<Company Name>> personnel during an urgent issue: e.g. system availability, data loss, etc.

Changes to commitments, requirements and responsibilities, including those relating to confidentiality, are communicated to customers via updated agreements and website notices.

2.4.1 BREACH NOTIFICATION

Please refer to the Incident Response Policy / Procedure for instruction on breach notification.

2.5 ISSUE REPORTING

Customers can report and track system issues or make an anonymous complaint.
Create a on-line form that allows customers to report issues or make an anonymous complaint.

3 REVIEW

Executive management meets at least annually with operational management to discuss customer service issues related to this policy.

4 CONTACT INFORMATION

Name of Security Program Owner

Title of Security Program Manager

Phone Number

Email

5 DOCUMENT RACI

Responsible	Assigned to do the work	Security Program Manager
Accountable	Final decision, ultimately answerable	ISM Governance Committee
Consulted	Consulted BEFORE an action or decision is taken (proactive)	Executive Management
Informed	Informed AFTER a decision or action has been taken (reactive)	Named Participants in this document Other parties affected by the change

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