

Smarsh Annual Service Plan

On-demand expertise at your fingertips

DATA SHEET

The Problem: Delays and rigid agreements

As companies race to keep up with the pace of regulatory change, they find an increased demand for subject matter expertise and services that help manage the increased workloads on their compliance teams. To stay ahead successfully, they need the right services at the right time — without the delays individual statement of work (SoW) engagements cause.

Staying ahead is crucial for large enterprise businesses or those planning significant compliance platform change. Companies face this need across multiple work streams, such as:

- Facilitating the adoption of powerful AI/ML surveillance models
- Managing the integration of new capture channels
- Administering an increasingly complex technical environment

Additionally, companies cannot risk getting locked into a set agreement that does not allow the flexibility to make changes as market conditions evolve.

The solution: More control, faster time to value, less cost

Smarsh has launched its Annual Services Plan (ASP) to provide access to a comprehensive portfolio of services across:

- Managed services
- Onboarding and Adoption
- Training and Smarsh University
- Professional Services w/SMEs

This is all without the need for SoW engagements for individual requests or being locked into a prechosen selection. Smarsh professionals will help the business map its annual needs, plan milestones, and iterate within an ongoing partnership to swap in different services when needs change. Companies always remain in control of how and when they spend their ASP budget.

Once an ASP is in place, the individual services can be agreed upon electronically at the point of need. With budgets pre-approved, service engagements are accelerated, and businesses can be assured of our most preferential rates — scaling with their ASP commitment.

Key Features

- Curated services plan mapped to your compliance needs
- Preferential rates on services
- Simplified business model with no SoW or wet signature
- Simple annual spend for ease of budgeting
- Flexible choice to change your mind and choose the services you need when you need them

The ASP portfolio of services



Managed services help users adopt Smarsh technologies at scale while freeing internal staff to focus where they are most needed. Extend your teams' operational capabilities across monitoring and administration or with embedded expertise for workflow tasks such as building, managing, and augmenting AI/ML and lexicon-based policies



Onboarding and adoption simplify the complex, ensuring that Smarsh technology solutions are deployed and configured to meet regulatory and company standards. Our team of experts ensures that your solution is primed to address change and growth as needs arise across our entire platform.



Training and Smarsh University allow customers to grow with confidence. With Smarsh University learning paths, end user teams are empowered to adopt and implement the solution and deliver impactful business outcomes via instructor-led (in-person or web-based) sessions, comprehensive knowledge base articles and curated e-modules.



Professional services subject matter experts help customers leverage the robust functionality of our solutions to achieve their business outcomes as needs change and compliance complexity grows. Our team of global experts across data science delivery, data management, technical consultancy and project management ensure you deliver successful results.

How it works

The ASP is an annual subscription providing on-demand portfolio access. During the initial engagement and before the start of every subsequent annual period, our consultants will work with business, compliance, and IT leads to map the following year's forecasted business landscape against expected service needs. Individual service rates and terms are pre-planned and agreed to upon entering an ASP.

At the point of service needs, compliance leaders can electronically confirm that a service be delivered through a lightweight work order without the need for an SoW or further budget negotiations. Customers may change services that have been forecasted at any time during each annual period – so long as delivery is possible, and changes are initiated prior to the launch of a service request.

As new service innovations are added at Smarsh, they will be candidates for release into the ASP portfolio, ensuring businesses retain access to the latest service offerings available.

Savings

The ASP can be priced to fit the needs of the organization with an annual commitment that reflects the projected services throughout the plan's term. Smarsh is able to provide increasing tiers of preferential rates for individual services within the ASP portfolio to support businesses with greater demand.

