

Oracle PartnerNetwork Customer-Partner Alignment Guide & Questionnaire

Topic	Rubric	Response (From Rubric)	Importance 1 = High to 5 = Low	Value (Response / Importance)	Comment
<p>1. How long has the partner been providing service to your business vertical?</p> <p><i>Why this is important: partners serving a particular vertical business for a significant length of time may generally have stronger knowledge of the history, specific needs, compliance requirements and industry or market trends, etc., related to your business that promotes accuracy and value aligned with your business outcomes.</i></p>	<p>5 = > 10 years</p> <p>4 = 8-10 years</p> <p>3 = 5-7 years</p> <p>2 = 2-4 years</p> <p>1 = < 2 years</p>				
<p>2. How long has the partner been in business as an Oracle PartnerNetwork member?</p> <p><i>Why this is important: with your exploration of partners to build, sell or implement services with Oracle technology, a partner with tenure</i></p>	<p>5 = > 10 years</p> <p>4 = 8-10 years</p> <p>3 = 5-7 years</p> <p>2 = 2-4 years</p> <p>1 = < 2 years</p>				

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<i>as an Oracle PartnerNetwork member may generally have more knowledge and experience with Oracle products and services.</i>					
<p>3. Does the partner have published Oracle PartnerNetwork Expertise with your products of interest and engagement needs in your region?</p> <p><i>Why this is important: Expertise is a foundational component of the Oracle PartnerNetwork for the specific purpose of informing you as the customer that the partner has met criteria that indicate that the partner has achieved the necessary knowledge, skills, capabilities and/or experience to successfully deliver the associated Oracle technology.</i></p>	<p>5 = Yes, for all in-scope products</p> <p>4 = Yes, for most in-scope products</p> <p>3 = Yes, for some in-scope products</p> <p>2 = Yes, for one in-scope product</p> <p>1 = No, not for any in-scope products</p>				
<p>4. Does the partner also have an Advanced Expertise that aligns with the experience needs of your</p>	<p>5 = Yes, extremely aligned</p>				

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<p>engagement (if one exists)?</p> <p><i>Why this is important:</i> Advanced Expertise within the Oracle PartnerNetwork indicates that the partner has met criteria that demonstrate an exceptional level of experience to deliver the associated Oracle technology.</p>	<p>4 = Very aligned</p> <p>3 = Somewhat aligned</p> <p>2 = Not very aligned</p> <p>1 = Not aligned at all</p> <p>0 = No related Advanced Expertise</p>				
<p>5. What resources, methods and/or tools does the partner utilize to ensure the timely and accurate delivery of products or services?</p> <p><i>Why this is important:</i> Partners that employ specific resources, defined methods and/or tools may have a stronger focus on repeatability and consistency with experience to deliver the Oracle technology as needed to achieve your business outcomes. These may include formalized process and communication tools to clearly understand project tasks, timelines,</p>	<p>(a + b, below)</p>				

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<i>progress and ownership to set and maintain expectations for successful delivery.</i>					
a. Project management?	3 = Project Management Certifications <u>and</u> Tools 2 = Project Management Certifications <u>or</u> Tools 1 = No Project Management Certifications or Tools				
b. Implementation schedules?	Yes = 2 No = 1				
6. Does the partner have a formalized and functional business continuity program? <u>Why this is important:</u> This ensures that information important to the success of your engagement remains protected and available in the event of a natural or	5 = Program is documented, reported and regularly tested 4 = Program is documented and occasionally tested 3 = Program is documented				

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<i>engineered disaster so that the impact and risk to you is minimized.</i>	2 = Some Program documentation and testing 1 = No formal Program				
7. Is there tooling provided by the partner and accessible to you for: <u>Why this is important:</u> <i>If the partner has provided custom technology as part of your engagement, having essential service management tools helps to maintain optimum value in that technology.</i>	(a+b+c)				
a. Updates and patches	2 = Yes 1 = No				
b. Problem and incident management	2 = Problem + Incident Mgmt 1 = Incident Mgmt Only 0 = No Incident Mgmt				
c. Service management	1 = Yes 0 = No				

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<p>8. Does the tooling incorporate accessibility features?</p> <p><i>Why this is important: Tools such as management and reporting portals typically involve technologies that may have local or national mandates to support persons with disability.</i></p>	<p>5 = all functions incorporate accessibility features</p> <p>3 = some functions incorporate accessibility features</p> <p>1 = no functions incorporate accessibility features</p>				
<p>9. Is the tooling available during and outside your business operating hours?</p> <p><i>Why this is important: Having management and reporting tools available both during and outside of business hours promotes business continuity, agility, and velocity with changes in business strategy or operations that can occur at any time.</i></p>	<p>5 = tooling is available 7x24</p> <p>4 = tooling is available 24 hrs during business days only</p> <p>3 = tooling is available 5x8 with on-call assistance available</p> <p>2 = tooling is available 5x8 only</p> <p>1 = no tooling is available</p>				

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<p>10. Can the partner ensure controlled or predictable lifecycle costs? What is the cost for the service/solution ...</p> <p><i>Why this is important: The ability to identify and control lifecycle costs not only promotes reasonable change in year-to-year cost for operation but also demonstrates the partner's ability to fully understand the service or solution end-to-end.</i></p>	(a + b + c)				
<p>a. For initial acquisition or start-up?</p>	<p>1 = Yes</p> <p>0 = No</p>				
<p>b. For ongoing licensing, support and/or maintenance?</p>	<p>2 = Yes</p> <p>1 = No</p>				
<p>c. With respect to increase/decrease cost trends year-over-year</p>	<p>2 = Yes with published controls</p> <p>1 = Yes but not published</p> <p>0 = No</p>				
<p>11. Does the partner have a formalized security policy and</p>	(a + b + c)				

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<p>tooling that...</p> <p><i>Why this is important: Information security and assurance is critical to business continuity and maintaining trust with stakeholders that information is both protected and available. A formalized policy in combination with tools to monitor and shape performance against the policy provide objective evidence that your information is likewise protected and available.</i></p>					
<p>a. Aligns with and satisfies required compliance programs?</p>	<p><i>2 = Yes, all required programs</i></p> <p><i>1 = Yes, some requested programs</i></p> <p><i>0 = No</i></p>				
<p>b. Regularly communicates security and compliance issues?</p>	<p><i>1 = Yes</i></p> <p><i>0 = No</i></p>				
<p>c. That provides regular security patches and updates, where appropriate?</p>	<p><i>2 = Patches provided regularly</i></p> <p><i>1 = Patches provided on-demand or following incident</i></p>				

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	0 = no regular patching or updates				
<p>12. Has the partner or their agents experienced any security breaches within the last three years involving customer data?</p> <p><i>Why this is important: Past performance against security and operating policies should be understood as a potential benefit or risk to your business outcomes and business continuity. Of greater importance than the breach itself are the mitigation and transformation strategies employed by a partner to minimize and protect against future disruptions.</i></p>	<p>5 = No</p> <p>1 = Yes</p>				
<p>13. Does the partner have a published ethics policy?</p> <p><i>Why this is important: While any company may acknowledge ethical business practices, a company with</i></p>	<p>5 = Formal, published policy with annual training</p> <p>4 = Formal, published policy</p>				

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<p><i>a published ethics policy demonstrates a focus on ethics and provides an opportunity to align company cultures based upon these ethics that lead to collaborative successful outcomes for both you and the partner.</i></p>	<p><i>3 = Policy exists but not published</i></p> <p><i>2 = Informal ethics policy</i></p> <p><i>1 = No ethics policy</i></p>				
<p>14. Does the partner have formalized processes for...</p> <p><i>Why this is important: Having formalized and documented processes for critical service management functions promotes consistency in response and business continuity with greater collective institutional ownership rather than individual ownership.</i></p>	<p><i>(a + b + c)</i></p>				
<p>a. Incident/problem management?</p>	<p><i>2 = Problem + Incident Mgmt</i></p> <p><i>1 = Incident Mgmt Only</i></p> <p><i>0 = No</i></p>				
<p>b. Change management?</p>	<p><i>2 = Formal Change Mgmt</i></p> <p><i>1 = Informal Change Mgmt</i></p>				

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	0 = No Change Mgmt				
c. Knowledge management?	1 = Yes 0 = No				
15. Does the partner have formal SLA's for...	(a + b + c)				
<i>Why this is important: Formal, documented and/or published service level agreements for action with critical service management functions provides the foundation for common expectations that effectively support business change and continuity.</i>					
a. Incident/problem resolution?	2 = Problem + Incident Mgmt SLA's 1 = Incident Mgmt SLA's Only 0 = No SLA				
b. Security, risk or compliance issue notifications?	2 = Formal SRC SLA 1 = Informal SRC SLA				

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	0 = No SRC SLA				
c. Change management notifications?	1 = Yes 0 = No				
16. Of the partner's accredited individuals...	(a + b)				
<i>Why this is important: While a partner may have many accredited individuals, this informs the level of direct support being provided to you to achieve your business outcomes.</i>					
a. How many would be assigned to your engagement?	3 = 3 or more individuals 2 = 2 individuals 1 = 1 individual 0 = None				
b. How many have the most recent certifications?	2 = all have most recent certifications 1 = some have most recent certifications 0 = none have recent certifications				

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<p>17. How many public references does the partner have?</p> <p><i>Why this is important: A public reference provided by, or of, the partner demonstrates a willingness to memorialize and share the success of previous engagements and provides additional evidence of competency.</i></p>	(a + b + c)				
<p>a. In the same vertical?</p>	<p>2 = Yes</p> <p>0 = No</p>				
<p>b. In the same industry?</p>	<p>2 = Yes, > 5 references</p> <p>1 = Yes</p> <p>0 = No</p>				
<p>c. With the same level of complexity as your engagement?</p>	<p>1 = Yes</p> <p>0 = No</p>				
<p>18. What has been the range of customer satisfaction/customer loyalty index (CLI) scores that the partner has received beyond what's needed for Expertise in the modernized Oracle</p>	<p>5 = average 9 +</p> <p>4 = average 7-8</p> <p>3 = average 5-6</p> <p>2 = average 3-4</p>				

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<p>PartnerNetwork?</p> <p><i>Why this is important:</i> The Customer Loyalty Index is an objective indicator of a customer's potential to engage in repeat work with the partner. A CLI of eight or higher is required to earn an Oracle Expertise for a defined number of engagements. Having additional data points provides an indication of consistency that promotes a successful outcome.</p>	<p>1 = average 1-2</p> <p>0 = none</p>				
<p>19. If you intend to have this partner manage your cloud environment...</p> <p><i>Why this is important:</i> There are several elements to consider when entrusting business functions to a partner. Performance against accepted best practices with other customers in a similar vertical and/or industry promotes success of your business outcomes.</p>	<p>(a + b)</p>				
<p>a. Has the partner attained a Managed Service Expertise</p>	<p>3= Yes</p> <p>0 = No</p>				

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within the Oracle PartnerNetwork?					
b. How many customers are currently managed by the partner under an Oracle Managed Service Expertise?	2 = > 2 1 = 1 to 2 0 = No Managed Service Expertise				
<p>20. Has there been a delivery project with unexpected or unplanned interruptions or delays that created a deviation from the expected outcomes? If so, how was the delivery project re-aligned for a successful outcome?</p> <p><i>Why this is important: Delivery projects can frequently encounter unplanned and unexpected changes in resource availability, complexity, etc. The ability to re-align the project to meet the expected outcomes and regular communication on these efforts is essential to project success and delivering the intended business outcomes.</i></p>	<p>5 = No</p> <p>4 = Yes, delivery was successfully re-aligned with frequent communication on status</p> <p>3 = Yes, delivery was successfully re-aligned with limited or no communication on status</p> <p>2 = Yes, delivery was NOT successfully re-aligned; frequent communication on status</p> <p>0 = Yes, delivery was NOT successfully re-</p>				

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	<i>aligned; limited or no communication on status</i>				
TOTAL RESPONSE VALUE					

Summary

This Customer-Partner Alignment Guide & Questionnaire is provided for your convenience only and is not intended to include all considerations you should explore when evaluating a company that may provide services to you, nor is it an endorsement of any particular partner to provide services to you. Oracle is not responsible for any acts of any partner that you select as a result of using this Customer Partner Alignment Guide & Questionnaire. The TOTAL RESPONSE VALUE reflects an overall number for guidance in considering one or more partners to support and successfully achieve your defined business outcomes. This number is weighted according to your stated business priorities (i.e., “importance”) with each response. A higher Total Response Value may indicate greater alignment to your business priorities and defined outcomes but should not be used exclusively in making partner selection.

To compute the TOTAL RESPONSE VALUE:

1. For each response, divide the Response number from the rubric by the identified Importance value for that response.

$$\text{Response Value} = \frac{\text{Response}}{\text{Importance}}$$

2. Sum all of the individual Response Values