



CUSTOMER SUCCESS PROGRAM GUIDE

Your Key to a World Class Customer Experience

Learn about the tools, services, and expert guidance we offer to help you achieve the best outcomes with **Blue Mountain RAM**.

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Expert support & guidance to enhance your Blue Mountain RAM experience & drive success

Regardless of your company's size or stage, we are committed to your success at Blue Mountain.

Our Customer Experience team, comprised of Life Sciences domain experts, solution consultants, and technologists, deeply understands your GMP needs and excels in designing, implementing, and supporting cloud-based solutions for the Life Sciences industry.

We ensure a reliable solution and unwavering support throughout your journey with us. This guide showcases our tools, services, and expert guidance, empowering customers to achieve long-term success.

CUSTOMER EXPERIENCE IS PARAMOUNT TO OUR SUCCESS.

“Every day, I am amazed and inspired by the groundbreaking efforts our customers undertake to create a better world. We understand that achieving such innovation requires significant effort, encompassing organization, standardization, and collaboration.

When our customers choose Blue Mountain as their technology partner to meet these crucial demands, we make a steadfast commitment to being more than just a provider – we become their dedicated business partner.

In pursuit of this mission, we have gathered a global team of accomplished scientists and technology experts, many possessing advanced scientific degrees and hands-on experience in the field. Working hand-in-hand with our customers, they drive effective transformations and provide unwavering support.

Our Customer Experience team is purposefully aligned to cater to the comprehensive needs of our customers, guiding them from the very beginning of their Blue Mountain journey and supporting them throughout their ongoing business evolution.

The most rewarding aspect of my role is witnessing our customers’ accomplishments in their vital endeavors. I am eager to forge a partnership with your company and help you reach new heights with Blue Mountain.”

David Hall Rode
Chief Executive Officer
Blue Mountain



GET TO KNOW BLUE MOUNTAIN'S CUSTOMER SUCCESS PROGRAM

At Blue Mountain, our comprehensive Customer Success program combines experts in Life Sciences and technology.

Our services include product training, support, account management, and technical advisory for top-notch assistance.



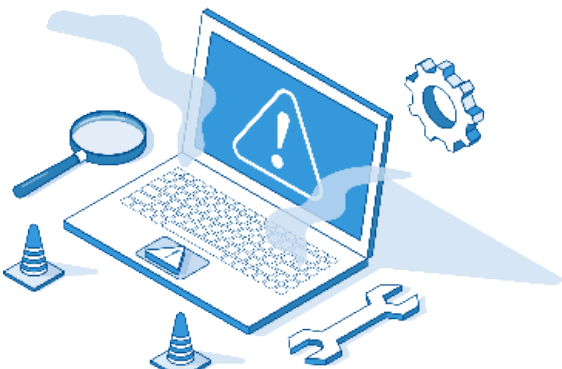



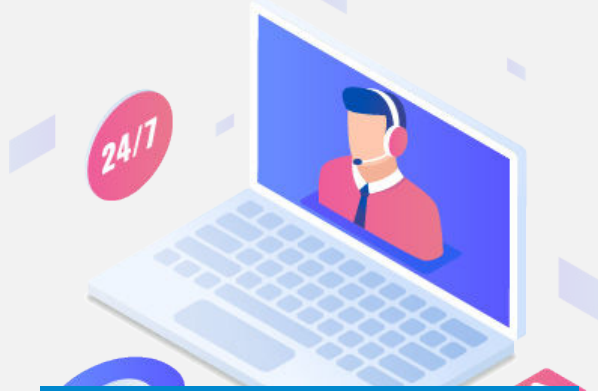

We meet you where you are, and offer exactly what you need, precisely when you need it. With Blue Mountain Customer Success, you get continuous support for your evolving solution, ensuring success throughout your journey.

Ginny Lee
Executive Director, Global Services
Blue Mountain



THE RIGHT SUPPORT FOR THE RIGHT SITUATION

* Additional Fees Apply

	Customer Success	Training Services	Product Support	Advanced Services
Do it with a Blue Mountain Customer Experience Professional	 CUSTOMER SUCCESS MANAGER	 INSTRUCTOR-LED TRAINING	 PRODUCT SUPPORT	 OPTIMIZATION ACCELERATORS* PEAK* SOLUTION ACCELERATORS*
Use Blue Mountain's Center of Excellence to Do It Yourself	 WEBINARS	 CERTIFICATIONS & E-LEARNING	 HELP CENTER KNOWLEDGE ARTICLES AND VIDEOS	 PARTNERSHIP PROGRAM

MEET OUR CUSTOMER SUCCESS TEAM

When you partner with Blue Mountain, you'll encounter a range of Customer Success professionals who work together to drive success across your organization. Each role brings unique perspective and experience to the function they specialize in.

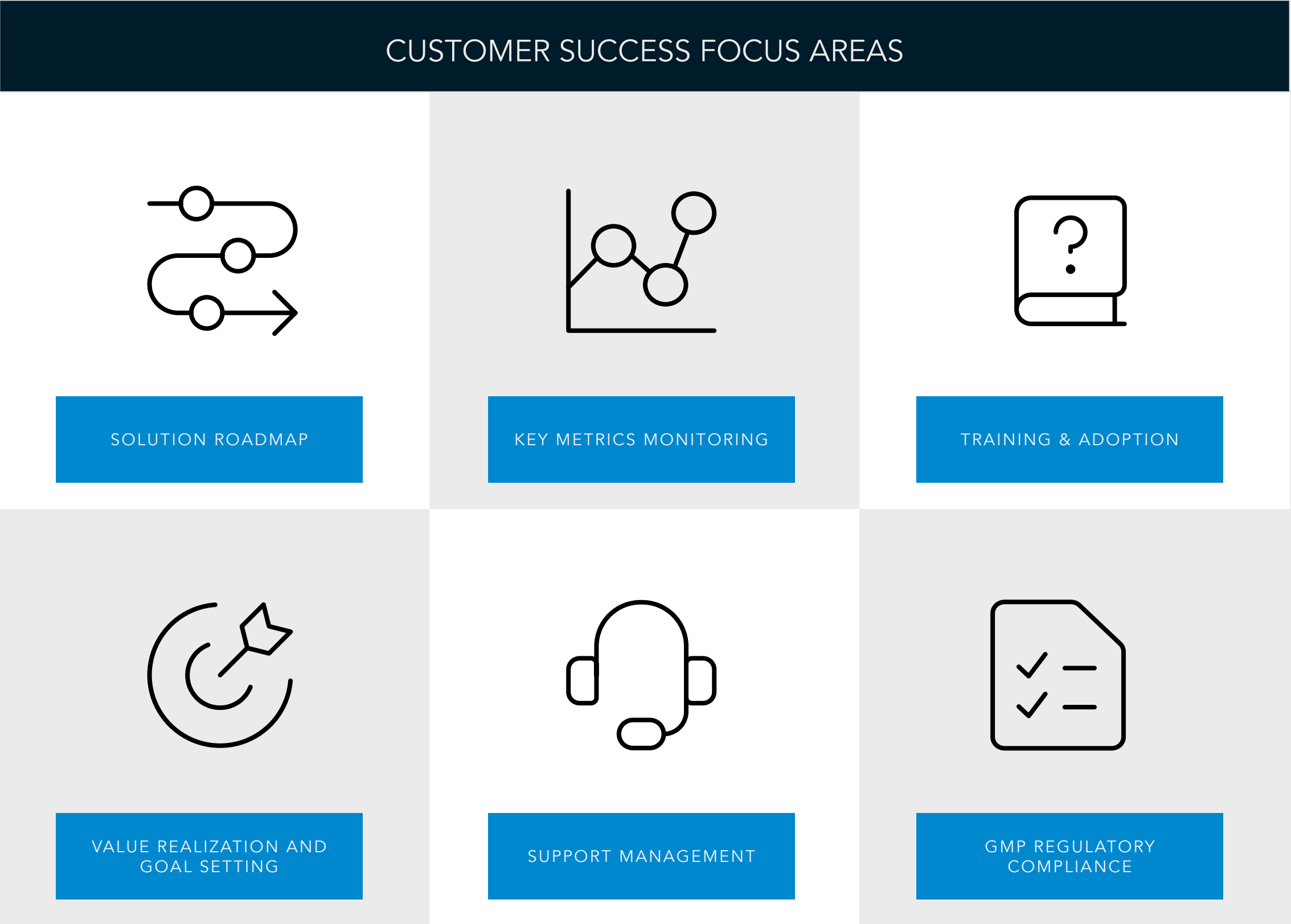
Here are some of the roles you might encounter:

Customer Success Manager	Customer Support Specialist
<p>Objective: Look holistically across their customer's Blue Mountain RAM implementation to ensure value realization, and proactively spot areas to focus on, including adoption, governance, change management, and product releases.</p> <p>Tactics: Success plans, business reviews, value and maturity assessments.</p> <p>Superpower: Looking into the future to spot opportunities before they turn into challenges.</p>	<p>Objective: Deliver responsive product support to customers when they have questions or concerns and ensure that all items are properly resolved (and escalated, if needed) in a timely manner.</p> <p>Tactics: Email responses, in-app chat, Help Center, emergency phone response.</p> <p>Superpower: Keeping customers working at full-speed by handling any question that comes their way.</p>
Technical Solutions Consultant	Product Manager
<p>Objective: Continually understand and assess the technical considerations of a customer's Blue Mountain tenant, then recommend and perform necessary updates. Provides administrative and advisory services as part of structured Optimization Accelerators as well as ad hoc needs.</p> <p>Tactics: Frequent consultations, Optimization Accelerators, configuration updates.</p> <p>Superpower: Knowing what's needed to align your tenant with business needs.</p>	<p>Objective: Getting deeply ingrained in the solution architecture of their customers, and continually reviewing the performance and interoperability of each aspect of their implementation. Helps to build a prioritized and sequenced roadmap for key capabilities needed over time.</p> <p>Tactics: Technical roadmap review, architecture review, system audit.</p> <p>Superpower: The ability to visualize complex enterprise architectures and boil them down to concerted steps to drive progress.</p>

A HOLISTIC APPROACH TO CUSTOMER SUCCESS MANAGEMENT

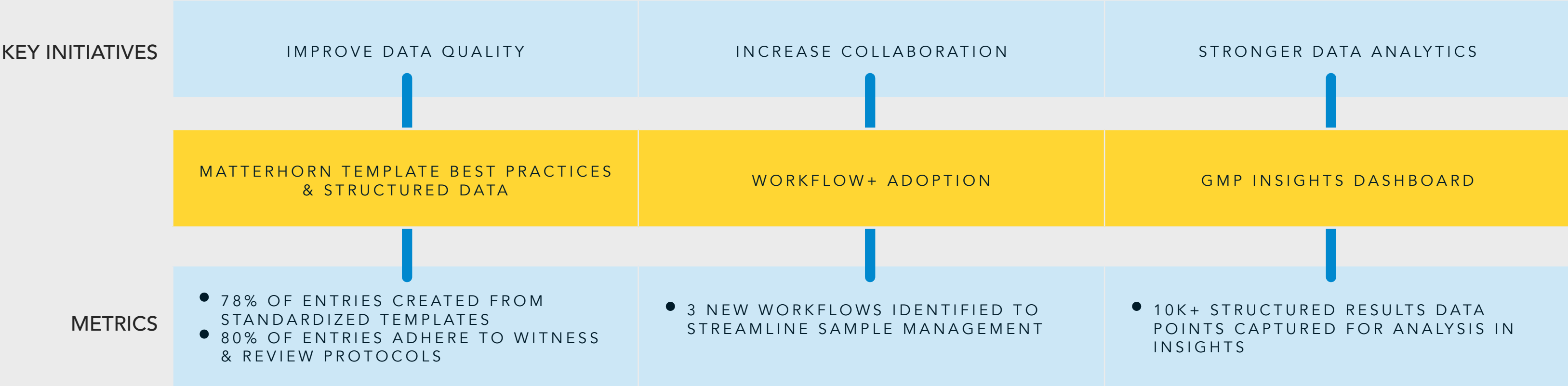
Blue Mountain’s Customer Success program provides proactive strategic guidance to customers once they have gone live on the Blue Mountain RAM Cloud. Your Customer Success Manager (CSM) will take the time to understand your business, and your top priorities, then align a success plan to meet those objectives.

While our CSMs are equipped with industry best practices and tools, there is no one-size-fits-all approach. Each relationship is built on a shared understanding of your top company goals. Typical focus areas for CSMs to engage include product adoption, change management, new feature releases, and more.



WORKING TOGETHER TO ACHIEVE COMMON OBJECTIVES

An example of common objectives along with guidance from a dedicated Customer Success Manager



“In my role as a CSM at Blue Mountain, I get to work very closely with some of the most innovative biotechnology companies in the world. I partner with my customers to create success plans around specific business and technology goals they may have. For that reason, every plan looks a little different as each is personalized to the customer’s strategic needs.”

Josh Muir
Head of Customer Success
Blue Mountain



COMPREHENSIVE TRAINING SERVICES TO ENABLE YOUR TEAM TO THRIVE

Our top priority is to ensure that your team understands how to best utilize Blue Mountain RAM and drive efficiency by simplifying their work processes.

We understand that training is not merely a one-time event during the initial onboarding; it represents an enduring commitment to continually equipping individuals with role-specific skills, facilitating smooth onboarding for new employees, and keeping our customers abreast of the latest product and industry innovations.

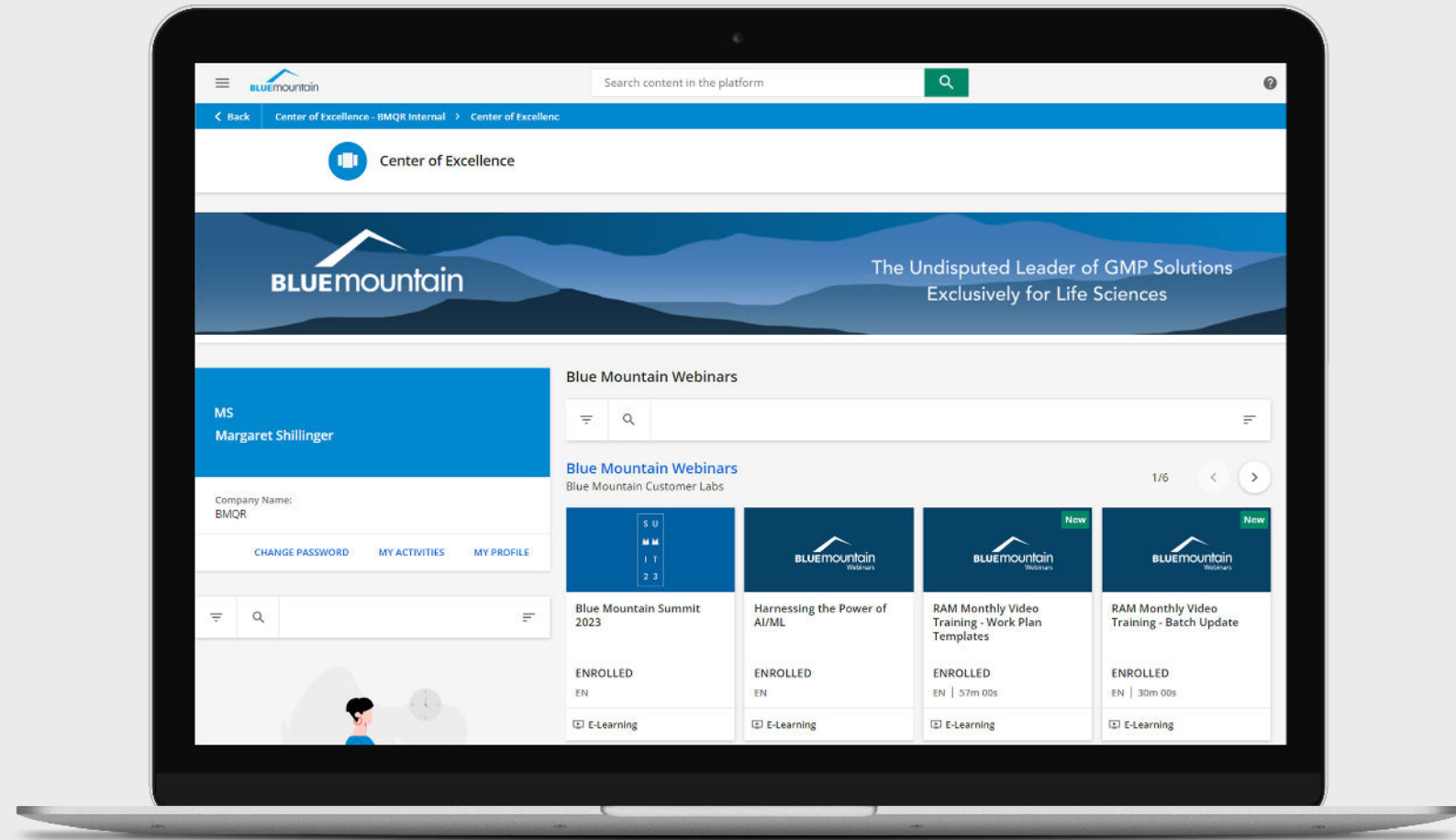
Recognizing that people learn best through different approaches, Blue Mountain offers diverse training services catering to distinct learning objectives and preferences.

Blue Mountain e-Learning introduces an engaging online learning model, enabling customers and partners to access flexible, on-demand courses from any location, thus acquiring essential Blue Mountain skills at their convenience.

For those who prefer personalized instruction, Blue Mountain also offers tailored, instructor-led trainings designed to address specific Blue Mountain usage and objectives.

Regardless of your preferred path, Blue Mountain provides a comprehensive array of options to ensure your team receives the training they need to thrive.

BLUE MOUNTAIN E-LEARNING LABS



Blue Mountain e-Learning Labs provides the comprehensive training your team requires, building the knowledge and skills to use and sustain the RAM Cloud while tailoring it to the needs of your business.

Flexible on-demand courses make it easy for any customer or partner to gain essential Blue Mountain skills from anywhere. Role-specific coursework helps everyone in your organization access up-to-date knowledge on how to drive success with Blue Mountain.

INSTRUCTOR-LED TRAINING



Blue Mountain provides customized trainings led by knowledgeable members of our Customer Experience team. These sessions can be hosted in-person or remotely.

Tailored curriculum teaches your team Blue Mountain fundamentals in the context of your own Blue Mountain implementation. Personalized attention from our trainers keeps everyone engaged and supported in their learning journey.

Ongoing education ensures that your team stays up to date with follow-on trainings to support new teams and users coming onto Blue Mountain, new products being used, or other substantial transformations to your Blue Mountain implementation.

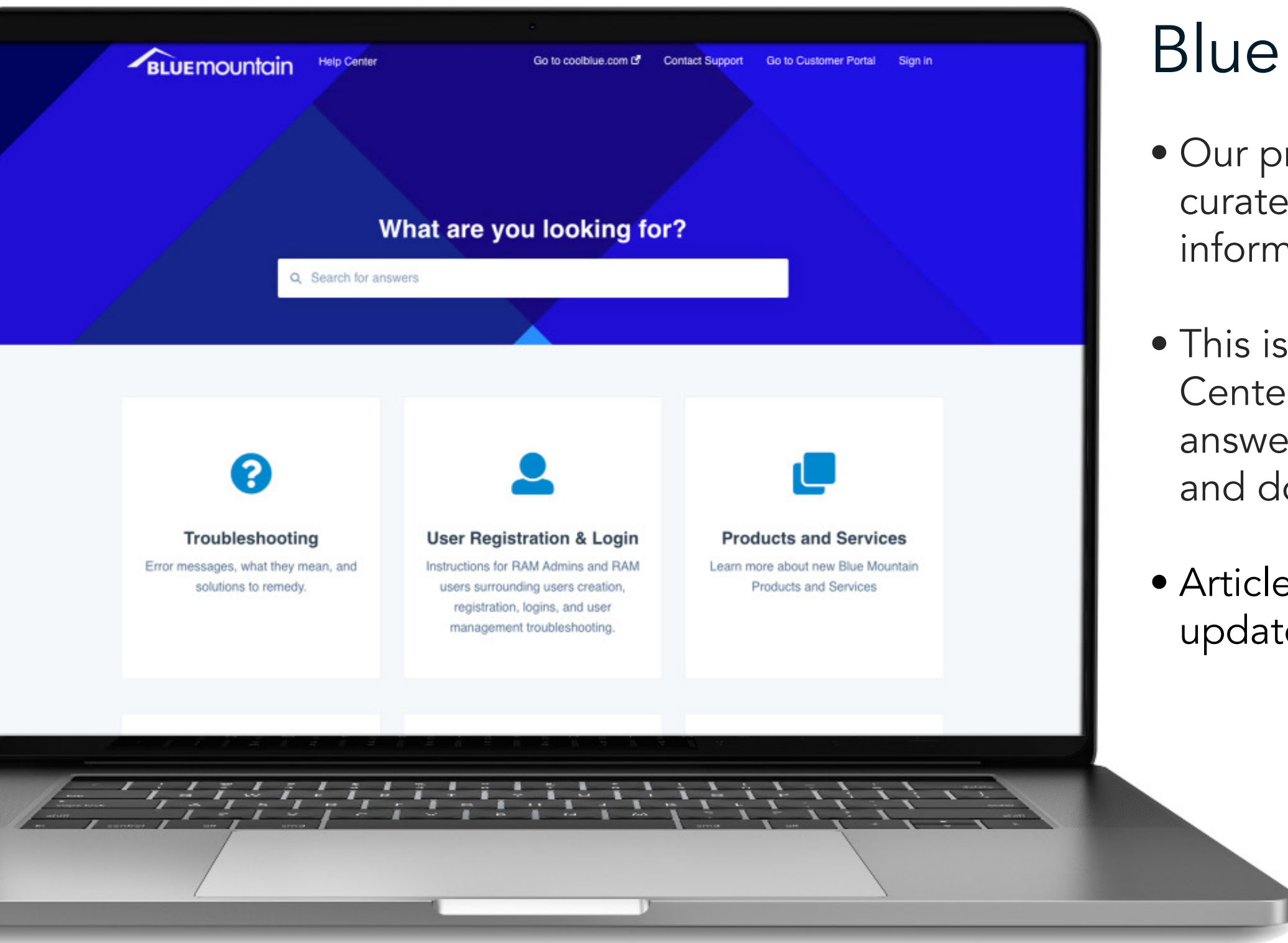
BLUE MOUNTAIN HELP CENTER ENABLES CLIENTS TO MAINTAIN PEAK PERFORMANCE, 24/7

Since the moment you embark on your Blue Mountain journey, we are dedicated to being there to address any inquiries that may arise. We understand the value of time, and we strive to avoid delays in providing you with the necessary assistance. Our team of experienced Blue Mountain Product Specialists is always ready to promptly respond to your questions.

- For swift self-serve guidance on commonly encountered topics, the Blue Mountain Help Center is at your disposal. Blue Mountain's Help Center is a centralized knowledge center designed to enhance our customers' expertise and capacity with information readily available at your fingertips.
- For any further product-related or technical support, you can rely on our in-app, web, or email support channels.

Rest assured; we are committed to ensuring you receive the help you need whenever you need it.

BLUE MOUNTAIN HELP CENTER




Blue Mountain Help Center


- Our product and technical specialists have curated a knowledge repository of useful information.
- This is available self-serve through our Center of Excellence to get your questions answered, see the latest product releases, and download other useful documentation.
- Articles are continually reviewed and updated by our team.


CUSTOMER SUPPORT SPECIALIST

When your team has a question, just fill out our online form at <https://www.coolblue.com/support/>, send us an email, or use the in-app support tool. Our Customer Support Specialists will reply promptly.

[Home / Support](#)

 514-234-2417
800-982-2355

 **Tech Support:**
techsupport@coolblue.com

 **Training:**
training@coolblue.com

Do you have any questions? We're here to support you! Message us below and we'll get back to you as soon as possible.

Name *

Email *

Phone *

Your Message *

SUBMIT

“

At Blue Mountain Support, we take pride in delivering exceptional customer experiences to users across the globe. Our team of skilled product and technical specialists plays a pivotal role in ensuring your satisfaction.

Additionally, we understand the importance of offering support in various forms, catering to your preferences. Whether through web, in-app, email, or self-service channels, we are committed to meeting your needs. Moreover, our close collaboration with product and engineering teams ensures that the guidance we provide is consistently up-to-date and relevant, keeping you well-informed and empowered.

”

Ian Prescott
Application Support Lead
Blue Mountain



ADVANCED SERVICES HELP ACCELERATE YOUR GMP PROGRAM



Life Sciences manufacturers must move quickly. The science evolves, the processes mature, and the data scales. It's critical that your Blue Mountain RAM software stays aligned every step of the way.

Blue Mountain provides a full range of Optimizations Services, that customers can employ to tackle their transformation needs.

Advanced Services gives you the support you need to keep your Blue Mountain implementation in full alignment with your GMP program and preserve your internal resources for other priorities.

PEAK Service eliminates the need for elongated services turnaround for readily needed implementation services. With PEAK, customers are placed in direct contact with a dedicated team of Blue Mountain Analysts. PEAK allows the ability to request a variety of Blue Mountain implementation services without the typical project-based approach that involves various departments.

When your company enrolls in PEAK, you purchase a set number of implementation hours that can be used for a variety of services throughout a calendar year, including Detailed Training geared to improve efficiency in targeted areas, Configuration Services, SOP Development, and Data and Schedules Review.

ADVANCED SERVICES ENGAGEMENTS: ADMINISTRATION SERVICES

The following services are typical engagements performed by Blue Mountain’s Customer Experience Team, under the guidance of your Customer Success Manager and Technical Solutions Consultant.*

ADMINISTRATION SERVICES	ROUTINE SERVICES TO KEEP YOUR RAM IMPLEMENTATION IN TOP PERFORMANCE
Frequent customer touchpoints	Dedicated time to understand your top priorities at the moment
Issue logging and tracking	Understand and track any technical issues that need resolution
Feature request tracking	Taking product feature requests back to Blue Mountain Product Managers
Tenant maintenance and upkeep	Direct updates to all aspects of Blue Mountain tenant, including registries/schemas, Notebook entries, computed fields, dashboards, and more.
Documentation upkeep	Maintaining documentation of your Blue Mountain implementation, including data model, training, and best practice documentation.
Feature release management	Updates and context on new features, customized where appropriate to your Blue Mountain implementation

* These Services are representative of the range that is offered. Actual services may vary according to customer needs and in partnership with your Blue Mountain Customer Success team.

ADVANCED SERVICES ENGAGEMENTS: OPTIMIZATION ACCELERATORS

The following services are typical engagements performed by Blue Mountain’s Customer Experience Team, under the guidance of your Customer Success Manager and Technical Solutions Consultant.*

OPTIMIZATION ACCELERATORS	FIXED-SCOPE PROJECTS TO DRIVE EFFECTIVE TRANSFORMATION
Data model refresh	Typically performed for a specific business unit or team, including use case identification, consultation, and reconfiguration
Data model expansion	Adding additional schemas for a team or group using Blue Mountain RAM, including scoping, developing, configuration, and testing
New feature configuration update	Help align new and existing software capabilities, including feature review, usage assessment, and configuration to meet customer needs
RAM Matterhorn template development and optimization	Establish a set of prioritized entry templates, including scoping, building, and training
GMP Insights dashboard template development and optimization	Establish a set of prioritized Insights dashboards, including scoping, building, and training
Integration and automation development	Consultation to build integrations and automations via API endpoints and Lab Automation application, including scoping, configuration, and troubleshooting

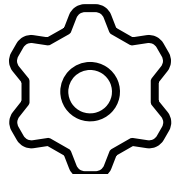
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WE'RE HERE TO HELP YOU ACHIEVE SUCCESS



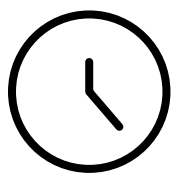
LIFE SCIENCE EXPERTISE

Leader in Life Science Enterprise Asset Management for 30+ years with 500+ customer worldwide



BUILT FOR GMP

Validation packages, audit trails and more to support your internal and/or FDA audits



TIMELY SUPPORT

Get help in the 24/7 Help Center or reach us by email or phone during business hours



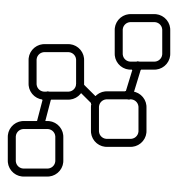
CONTINUOUS TRAINING & LEARNING

Access to both free and fee-based courses to further you and your teams' learning



BEST-IN-CLASS ONBOARDING

Personalized program to get you setup quickly & efficiently



BROAD SUPPORT ECOSYSTEM

Identify and scope optimization opportunities with the Blue Mountain team and its partners

EVALUATING EAM SOFTWARE OPTIONS?

Reach out for an initial discovery call to learn more about the Blue Mountain RAM and how our [Customer Success](#) team can help drive amazing outcomes for your team.

ALREADY A BLUE MOUNTAIN CUSTOMER?

Reach out to your Account Executive and Customer Success team to explore Success Packages that may be right for your team.

Use our self-serve [Help Center](#) or [Support Form](#) to get your questions answered quickly by our Support team.



800-982-2388 // SALES@COOLBLUE.COM // COOLBLUE.COM // [LINKEDIN](#)

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