

# MARKETPLACE APPLICATION CERTIFICATION



The certification program is designed for Marketplace application developers. As the platform vendor, Creatio certifies chosen solutions that meet high quality standards, get high scores from users and can be recommended to the whole community.

The following policy describes the requirements and the procedure for solution certification.

## APPLICATION CERTIFICATION PROCESS

A developer can apply for certification if his application has been published on the Creatio Marketplace. The certification process consists of 5 stages:



## BENEFITS OF CERTIFIED APPLICATIONS

Certified solutions have several key advantages when it comes to their promotion and further development on the Creatio Marketplace.



### Certified solution badge

The Marketplace website issues a special "Certified" badge for all certified applications, stating that these apps were reviewed and recommended by Creatio experts.



### Active expert sales

Information about certified solutions is included in default sales kits for Creatio sales experts and partners. Creatio sales managers are required to know the functionality of each certified application. Certified marketplace solutions are recommended during sales transactions and they are offered to clients proactively alongside core Creatio products (as opposed to presenting them only upon request).



### Solution quality review

All certified solutions undergo a review by Creatio experts for recommendations on improvements and further development.



### Solution support tools

Creatio assists developers with their certified applications through Creatio success portal. Customer service standards of certified apps are regularly reviewed and shortcomings are pointed out to the developers; case escalation process involves engagement from Creatio experts and management.

# STAGE 1: DEVELOPER REQUEST

*A developer, who published a solution on the Marketplace, can apply for certification by submitting a request to the Marketplace team.*

*The goal of this stage is to make sure that the developer is interested in promoting the solution and is prepared to invest in its development and support. Marketplace solution certification should be a developer's strategic initiative.*



## 1.1. DEVELOPER REQUEST REVIEW

Before starting certification activities, Marketplace team holds a kick-off meeting to determine whether the developer is ready for such a strategic endeavor as part of the certification process.

### **Developer readiness checklist:**

- dedicated resources the developer provides for the solution support;
- solution roadmap;
- developer's commitment to invest in the quality of the solution;
- the level of development processes.

# STAGE 2: REQUEST APPROVAL

*Application certification is an investment of both the developer and Creatio. Creatio reserves the right to prioritize certification requests and decide on whether and when to conduct each particular certification.*

*The highest priority is given to the applications that meet the most critical user needs and have functionality that is not provided in Creatio core products.*



## 2.1. CERTIFICATION PRIORITIZATION

Creatio experts and leadership team decide on the solution certification priority based on:

- the current solution portfolio on the Marketplace, including the solutions certified earlier in the same domain;
- solutions listed in Creatio Marketplace Map are given priority;
- customer requests.

# STAGE 3: SOLUTION CERTIFICATION

*Certified solutions are applications that meet the high quality standards and Definition of Done (DoD) criteria. They are thoroughly tested by developers and verified by the Marketplace team.*

*Only solutions that pass quality certification successfully can proceed to the next certification stages. Upon release of each new version, a certified solution is returned to this stage and all the steps should be completed again.*



## 3.1 PROVIDING MATERIALS FOR THE CERTIFICATION

To conduct the quality certification, a developer should provide:

**1. Solution packages.** A single package (.gz file) or a .zip archive that contains the solution configuration logic (to be provided in the developer workspace).

**2. Setup and installation guide.** The guide must include all the steps necessary to set up and start using the functionality "from scratch" (to be provided in the developer workspace). If on-site customers are required to perform any additional steps to set up the application, they should be provided with a guide and/or an application setup service by the developer (to be provided in the developer workspace).

**3. User guide.** The guide must include core solution use-cases for the end-users (to be provided in the developer workspace).

**4. Test cases and test report.** The list of test cases that cover the application functionality and the report of a successful test run.

**5. Demo version.** Package with demo data (.gz- file) and, if necessary, a demo instance of a third-party service integrated with Creatio (end-users must be able to test-drive the solution features from the Marketplace website).

**6. Information about external services (if applicable).**

- A diagram with the architecture of an external service and its integration with Creatio (data and message flows)
- hosting provider for an external service, its location, security certificates
- service monitoring tools and processes
- service backup tools and processes
- fault tolerance tools
- valid certificates, data security, and access policies established by the developer.

**7. Sales kit.** Materials for sales presentations, quotes, and other information for sales representatives.

**8. Video overview.** A video demonstrating the purpose and core features of the solution.

**9. Solution quiz.** A set of questions and a practical assignment for testing the knowledge of the solution functionality.

**10. What's new.** List of changes made in the latest version of the solution (new features, improvements, and bug fixes) in case of certified app update – to be provided in the developer workspace.

## 3.2. "DEFINITION OF DONE" VERIFICATION



### QUALITY AND SECURITY

#### 1. Functional testing

The solution must be tested by the developer and must work properly in all use cases.



#### Review procedure:

Test cases are reviewed for full coverage, and manually re-tested to ensure test report validity.

#### 2. Code quality and security

The code must not contain any prohibited or deprecated Creatio customization methods, which reduce the solution security, compatibility or performance.



#### Review procedure:

Verification is performed by the R&D experts.

#### 3. Product localization quality

All claimed application localizations should be of appropriate quality and available for all texts and images in the application. All applications published on marketplace.creatio.com must be in English.



#### Review procedure:

Automated verification of localization coverage, manual validation of translation quality by language experts.



### DELIVERY AND COMPATIBILITY

#### 4. Compatibility with core products

The solution must run with no errors on all latest release versions of the compatible core Creatio products.



#### Review procedure:

Successful installation of the solution on core products (no errors in the application setup log); core functionality should successfully pass auto tests after app installation.

#### 5. Backward compatibility with the latest release version

The solution should work properly when updated from the previous version. All actions of the updated scenario (e.g., special SQL-scripts) should be included in the application package.



#### Review procedure:

Successful installation of the solution on the previous versions (no errors in the application setup log), ad-hoc testing.

# STAGE 3: QUALITY CERTIFICATION



## USABILITY AND UX

### 6. Solution setup by the user

Based on the setup and installation guide, users should be able to set up the solution on their own. If the solution requires manual setup by the developer, the guide should describe a way of setting up the app functions in the demo mode by the user, without developer's participation.



#### Review procedure:

Manual testing of the solution setup process using the setup guide.

### 7. UX standards compatibility

The solution should be compatible with the Creatio core product logic and UX.



#### Review procedure:

Marketplace experts analyze the solution for UX standards compatibility.

### 8. Demo data

The solution package should contain the minimal necessary data (e.g., 1-2 records in each section) or separate demo-package to illustrate and test-drive the functionality.



#### Review procedure:

Checking the available data in sections/lookups/details upon package installation or demo-package verification.



## INTEGRATION REVIEW

### 9. Security and reliability

If the solution requires the developer's servers for support or deployment, the server should meet the security and reliability standards.



#### Review procedure:

Marketplace experts analyze submitted documents and perform ad-hoc verification of the information provided.

### 10. Performance and fault tolerance

If the solution implies using any software which is external to Creatio and is not built on the Creatio platform, the integration architecture should be designed to meet high performance and fault tolerance requirements.



#### Review procedure:

Creatio Marketplace team and R&D experts review the solution architecture and introduce a list of issues that must be resolved by the developer.

# STAGE 4: SUPPORT CERTIFICATION

All developers of certified solutions adhere to the core principle: "Customer is #1 priority". So they must ensure efficient and top-quality resolution of all issues reported by their customers.

Implementation of the necessary changes in the developer's customer service processes is a required stage of the Marketplace solution certification.



## 4.1. IMPLEMENTATION OF CUSTOMER SUPPORT SYSTEM

A developer should implement a customer support system where all incoming support cases from all supported channels are registered and processed.

All customers must have an additional option to register their cases on the Creatio success portal ([success.creatio.com](https://success.creatio.com)).



## 4.2. NOTIFICATION ABOUT IMPLEMENTING THE SUPPORT STANDARDS

**Minimum support packages.** Developers should support certified apps according to all standard Creatio support packages (Basic, Business, and Premium). (<https://www.creatio.com/services/support/options>).

**Response terms on presale questions.** Developers should respond to presale questions (for example, price quotation for a specific customer, a live-demo request, etc.) within two working days.

**Support time zones.** Developers should provide technical support in English in the EST time zone (GMT-5) for any certified solution. Technology Partner provides technical support in the time zone and language of the customer's region. For applications published on [marketplace.creatio.com](https://marketplace.creatio.com), support is provided in English within the following schedule: Americas - according to the EST time zone (UTC-5), PST(UTC-8); APAC - according to the GST time zone (UTC+4); EMEA - by DST time zone (UTC+1).

**Case escalation process.** Developers should establish a process for support case escalation with the following escalation levels:

	Developer's team	Creatio team
1 <sup>st</sup> escalation	Department manager / CEO of the developer company	Marketplace analyst
2 <sup>nd</sup> escalation		Support Team Lead, Marketplace Team Lead
3 <sup>rd</sup> escalation		Head of Digital, Customer Success Director, VP of Product
4 <sup>th</sup> escalation		CEO



## 4.3. SUPPORT AUDIT

The application support process must meet the described requirements at the time of the certification.



**Review procedure:** The Marketplace team audits the developer's processes (case review for the recent period, testing using the "secret shopper" method, etc.). If any shortcomings are detected, the Marketplace team sends a report to the developer and provides the deadlines to resolve these issues.

# STAGE 5: REGULAR AUDIT

Certified Marketplace solutions are intensely and successfully used by customers, while receiving high customer satisfaction scores.

To ensure this, we regularly conduct customer service audits and measure the KPIs of all certified solutions. If the audit results demonstrate that the process requirements are not met or the KPIs do not match the target values, the Marketplace team reserves the right to suspend or withdraw the "Certified" status of an application, and/or agree on the schedule to eliminate the detected issues with the developer.



## 5.1. EVALUATION OF THE USER FEEDBACK SCORES (NPS)

### NPS Survey:

A customer survey is performed twice a year.



**Target values:** feedback score of 7.5/10 or higher.



## 5.2.1 EVALUATION OF THE CASE RESOLUTION FEEDBACK SCORES

### Customer satisfaction survey (CSAT methodology)

A customer satisfaction survey is sent automatically upon every customer request.



### Target values:

- 7% and up of the customer feedback responses, based on the total number of cases
- positive feedback for 80% or more of the evaluated support cases

## 5.2.2 % OF CASES OVERDUE BY RESPONSE

### Number of overdue cases

Overdue response terms are calculated automatically based on the customer SLA



**Target values:** no more than 1% of overdue cases from all cases

## 5.2.3 % OF CASES OVERDUE BY RESOLUTION

### Number of overdue cases

Overdue resolution terms are calculated automatically based on the customer SLA



**Target values:** no more than 5% of overdue cases from all cases



## 5.3. SUPPORT CASE ESCALATION ANALYSIS

### Number of support case escalations

The total number of cases with escalation is calculated (first escalation and higher).



**Target values:** no more than 2 escalations per month.



## 5.4. SUPPORT AUDIT



**Review procedure:** The Marketplace team regularly audits the developer's processes (case review for the recent period, testing using the "secret shopper" method, etc.). If any shortcomings are detected, the Marketplace team sends a report to the developer and sets a deadlines to resolve these issues.

# CERTIFIED SOLUTION UPDATES

*When a new version is released, the certified solution must meet all quality standards and DoD.*

*For the certification of the updated version, the developer should provide the same materials as for the first certification of the application. When publishing the update, the Marketplace team verifies the DoD of the certified solution following the same steps as for the first time app certification.*



## **BACKWARD COMPATIBILITY AND SUPPORT OF THE OLDER VERSIONS**

- For each new update, the developers should ensure compatibility with the previous versions of their application.
- Developers should support all versions of their solution used by customers with active subscriptions or support packages.
- All customers of certified application should be updated to the most recent released version.
- In case of an error, the update or patch that eliminates this error must be delivered as soon as possible, regardless of the core product release schedule.