Delinea

Delinea Technical Account Manager

At-A-Glance

IT has enough on its plate. Add to that a new PAM or identity security solution and it can be a struggle to maintain system health, keep up with the latest security threats, and liaise with the vendor for bug fix and enhancement requests. All while trying to respond quickly to the needs of the business. Delinea Technical Account Managers (TAMs) provide relief to help organizations stay on top of things.

Delinea TAMs are experienced professionals that bring their unrivaled product knowledge and proven skills to help streamline deployments and apply best practices to help set the strategic direction for solution optimization and growth. Many Delinea customers leverage our TAMs to minimize credential-based cybersecurity risks and ensure ROI for their IT investment.

Communications

- TAMs are your designated technical point of contact for critical issues and escalation needs.
- Regularly scheduled remote sessions to discuss ongoing projects, business priorities, and maintain a high-level of engagement with Delinea.
- TAMs schedule quarterly reviews to understand changes in customer environment and business needs.

Project Initiatives

- TAM will align your IT business priorities.
- TAM will track new bugs, new product releases, and security vulnerabilities and will proactively notify customer of any changes that may impact its environments.
- TAM will serve as the customer advocate for promoting customer interest within Delinea Engineering and Product Management for future functionality and product roadmap items.
- TAM will address capability gaps.

Architecture Insight

- TAM will provide guidance for strategic planning in customer's PAM environment.
- Regular review sessions to validate plans, configurations, and designs centered around Delinea software and operations.
- TAM will provide and advocate Best Practices.
- TAM will provide guidance on environment performance improvements.

Support Case Resolution

- TAM will be the primary contact and work with Delinea Support to help resolve high priority P1 & P2 support cases, facilitating .
- TAM guidance will help to mitigate the need to open Support cases.

Best Practices Assessment

- Your TAM will conduct a thorough review of your environment and provide performance optimization feedback, including recommended configuration changes, upgrades, and environmental expansions.

Environment Documentation

- Your TAM will ensure that environment details are clearly documented and available to our entire Support team. This minimizes the need for repeated information gathering and speeds up the support process for all your users.

Product Roadmap

- TAM will present demonstrations on new and upcoming product features and functionalities.
- TAM will conduct product roadmap presentations or coordinate custom presentations with Delinea Product Management.
- TAM will provide insider information into Delinea.

Key Outcomes

- TAMs ensure your business and technical needs are understood throughout Delinea.
- TAMs assist you to maximize and accelerate solution adoption and value realization.
- TAMs prevent issues and resolve challenges faster.
- TAMs allow you to leverage new capabilities quickly.
- TAMs optimize your Delinea solutions.
- TAMs create closer connection to Delinea thought leadership and peers.

Customer Experience Service Offerings

	DSE Only	TAM Only	Premium+ (TAM + DSE)
Resourcing	• Designated Support Engineer (DSE). • Assigned to a limited number of accounts	• Technical Account Manager (TAM). • Assigned to strategic accounts	• TAM and DSE assigned jointly to account
Meeting Cadence	• Case based interaction. • Leads regular case reviews. • Assist & Participates in QBRs	• Weekly or as needed. • Leads strategic sessions • Assist & Participates in QBRs	• TAM drives strategic sessions • DSE joins QBRs and leads case reviews
Strategic Role	• Deep technical expertise • In-depth knowledge of account architecture & goals • Specialized in product use cases	• Voice of customer • Strategic planning & deployment • Product SME • Trend analysis	• Combines TAM's strategic vision with DSE's in-depth technical execution
Support Case Ownership	• Owns most cases (P1–P4) • Performs initial case triage • Leads troubleshooting & resolution • Guides other support engineers • Escalates as needed	• Monitors support trends • Escalates strategically • Not the case owner	• DSE owns cases and coordinates with TAM for escalation visibility and customer alignment
Incident Management	• Owns all major incidents during regular hours • Supports non-major incidents with oversight • Ensures priority escalations reach Advanced Support and/or Engineering	• Stays informed on incident status • Escalates high-impact issues • Aligns incident communication with customer goals	• DSE leads resolution • TAM manages communication and business impact
Proactive Case Management	• Leads regular ticket reviews • Prioritizes issues accurately • Tracks case progress • Engages cross-functional teams	• Reviews trending data • Identifies recurring issues • Escalates chronic problems	• Joint monitoring and prioritization across business and technical lenses
Environment Familiarization	• Documents environment details • Understands customer setup & goals • Enables faster, contextualized support • Reduces repetitive info gathering	• Documents environment details • Understands customer setup & goals • Reduces repetitive info gathering	• TAM references documented environment • DSE maintains accuracy for efficient case handling
Product Updates	• Case based updates for related bug fixes.	• Notifies customers of upcoming releases • Explains potential impact • Tracks regressions	• TAM leads comms • DSE provides technical input and impact assessment
Product Configuration	• Advises on technical design decisions • Reviews customer configurations • Ensures scalability and stability	• Conducts Best Practice Assessments (BPAs) • Reviews use cases • Guides strategic alignment	• DSE and TAM jointly guide design and strategic use
Feature Requests	• Provides technical rationale and use case context to Product team for related cases.	• Works with Product Management to prioritize requests	• Joint effort: TAM drives prioritization; DSE provides technical justification
Training & Enablement	• Targeted case based show and tells during troubleshooting	• Demos product features	• Full TAM enablement • Opportunity for 5 people to earn one expert-level technical certification (Delinea Platform or Secret Server On-Premises)
How to reach us	Work with your Account Team for any ongoing day-to-day questions or needs. If you have Technical Support issues, please continue to follow our recommended best practices for working with Support which can be found at support.delinea.com.		

Delinea

Delinea is an identity security platform governing what AI agents, humans and machines can do, and for how long. Just-in-time authorization extends privileged access management from access to action, cutting standing privilege across on-premise, multi-cloud and ephemeral infrastructure. Its platform scores identity risk and keeps access decisions auditable. Over 9,000 organizations, including two-thirds of the Fortune 100, rely on Delinea. Learn more at **delinea.com**.

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