

SERENA ALLIANCE PARTNER PROGRAM NORTH AMERICA

Program Guide



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Introduction to Program Guide

Welcome to the SERENA Alliance Partner Program Guide. Sales through indirect channels continue to represent a large and rapidly growing portion of SERENA's business. SERENA's Alliance Partners play a critical role as providers of SERENA ALM solutions to our mutual customers. This Program Guide is intended for companies applying to become or already participating in the SERENA Alliance Partners Program in North America.

Alliance Partner Team

June 2007

IMPORTANT INFORMATION: If you have signed a reseller or referral agreement (a "Partner Agreement") that refers to this Program Guide, the terms of this Program Guide are subject to the terms of the Partner Agreement. In the event of any inconsistency between the Program Guide and the Partner Agreement, the terms of the Partner Guide govern.

CHAPTER I

SERENA Alliance Partner Program: North America

Alliance Partner Types

Referral Partner

Refer potential clients to Serena for a commission.

- Provide leads and introductions to SERENA's direct sales team.
- Referred prospects, once approved and registered by SERENA, are attentively pursued in accordance with SERENA's strict sell-with-integrity approach. Referral Partners are apprised of progress and are paid for opportunities actually closed.

Corporate Reseller

Become a "Go-To" Source for SERENA solutions.

- Help customers control IT spending by easing the burden and headache of selecting, purchasing and managing enterprise software.
- Provide global procurement of business-to-business IT solutions and services.
- Deliver value-driven technology solutions with a total focus on customer service. SERENA Reseller customers include large, multinational enterprises and Fortune 500 companies, as well as mid-sized organizations, from a wide variety of industries.

Value Added Reseller (VAR)

Profit from VARs' software applications and services that add value to SERENA solutions. VARs are practitioners who solve the problems associated with enterprise change. Based on their extensive knowledge they design, develop, deploy and manage specialized software packages that extend and add value to SERENA ALM solutions.

SERENA VARs solve the problems associated with enterprise ALM by providing:

- Domain knowledge or relationship contact with customer
- Professional / Delivery services
- SERENA Alliance Partners' software solution that solve a specific ALM problem
- Integration, customization, and enhancement of the SERENA platform.

CHAPTER II
Requirements - Matrix

TABLE 1: REQUIREMENTS BY SERENA ALLIANCE PARTNER TYPES

Requirement	Referral	Corporate Reseller	VAR
SERENA Alliance Partner Agreement	Yes	Yes	Yes
Complete and maintain profile on <i>Partner Connection</i>	Yes	Yes	Yes
SERENA content on SERENA Alliance Partner's website		Yes	Yes
SERENA trained sales person on SERENA Alliance Partner's staff		Yes	Yes
SERENA <i>Partner Connection</i> Dashboard customer reference		Yes	Yes
Annual Business Plan (See Appendix)		Yes	Yes
Sales forecast		Yes	Yes

Chapter III

Requirements - Descriptions

SERENA Alliance Partner Agreement

Each SERENA Alliance Partner must sign an appropriate agreement as per partner type.

SERENA Partner Connection

SERENA *Partner Connection* provides SERENA Alliance Partners with 24x7 accesses to product collateral, customer presentations, playbooks, customer case studies and other useful sales tools. (See Chapter VII – SERENA *Partner Connection* for more information.)

Each SERENA Alliance Partner must have a complete and up-to-date profile on *Partner Connection*. This information is used to update the serena.com corporate partner pages and this information is used by SERENA sales people to find potential partners for customers.

- Partner Type (Referral Partner, Corporate Reseller, VAR)
- Company Name
- Description
- SERENA Alliance Partner company's website or landing page (URL)
- Headquarters' Address
- Sell-into location(s) – (e.g., USA, Latin America, etc...)
- General phone number if customers wish to contact SERENA Alliance Partner directly
- General email address(es)
 - (e.g.) sales@mycompany.com
 - (e.g.) info@mycompany.com
- Core competencies (e.g., ITIL, CMMI, Web Development, etc...)
- SERENA solution integration
- SERENA Alliance Partner company logo

SERENA Alliance Partner information on serena.com

Information on SERENA Alliance Partner is listed on SERENA's corporate web site, available at:

<http://www.serena.com/US/partners/index.aspx>. This makes it easy for our customers and prospects to find the right partner to meet their specific needs. SERENA Alliance Partner's profile in *Partner Connection* is used to generate the content of the partner page on SERENA's corporate web site. Please keep your profile up to date to ensure correct content is displayed on the partner page.

The following types of North American partners are included in the SERENA Corporate web site:

- Value Added Reseller (VAR)
- Corporate Reseller
- Referral Partner

Content on SERENA Alliance Partner's website

SERENA Alliance Partners may use a unique SERENA Program logo for use on web sites, in collateral, or in other promotional activities related to the partners' alliance with SERENA. Logos in various formats (and their use guidelines) are available on *Partner Connection*. The SERENA Corporate logo is available there as well. Please make sure you are familiar with and adhere to all logo usage guidelines. Similarly, Serena, TeamTrack, Dimensions, Mariner, ChangeMan, PVCS and the Serena logo are the registered trademark or trademark of SERENA Software, Inc. Other names may be trademarks of their respective owners. Please also refer to trademark usage guidelines.

URL to SERENA Alliance Partner landing page is www.serena.com/US/partners/index.aspx.

- SERENA Corporate logo



- SERENA Alliance Partner logo



- SERENA Company description

SERENA is the leader in Application Lifecycle Management for the Enterprise. With 29 offices in 14 countries, we are the largest independent company dedicated to helping IT capitalize on its software development initiatives. More than 15,000 organizations around the globe, including 96 of the Fortune 100 and 90 of the Global 100, rely on our industry-leading ALM solutions and expertise.

For over 25 years SERENA has been a leader and an innovator in the software change management industry. Today we continue to lead the industry by providing complete yet modular solutions that enable IT to seamlessly manage the enterprise software development process across global locations, platforms, and methodologies. In addition, these solutions increase and enhance collaboration and decision-making across IT. Ultimately SERENA gives IT more power, at lower cost of ownership, to deliver business changing software.

Chapter IV

Benefits

SERENA xChange

This annual users' conference in the fall is where SERENA customers gather to share ideas, hear SERENA's strategic plans and directions, explore partner solutions, and network with other SERENA Alliance Partners and SERENA executives. There are conference "sponsorship" opportunities allowing partners to gain exposure to SERENA's targeted audience, sales organization and ecosystem. SERENA offers a variety of partner-specific opportunities during the conference, including participation in the Solution Pavilion, customer and partner speaking sessions, and a variety of promotion opportunities.

SERENA Partner Kickoff (PKO)

PKO offers SERENA Alliance Partners from around the world the opportunity to participate in the same training (and gain access to the same sales tools) as those provided to the SERENA direct sales force.

SERENA Alliance Partners will gain a clear understanding of SERENA's strategy and programs for the upcoming fiscal year and how that translates into rewarding business opportunities. SERENA Alliance Partners will learn about SERENA's product roadmap and how to maximize sales efforts.

SERENA Alliance Partners will also hear "best practices" discussions from other SERENA Alliance Partners and have the opportunity to network with other SERENA Alliance Partners and SERENA executives.

Partner Advisory Council

A select group of SERENA Alliance Partners from around the world convene to discuss program requirements that help maximize sales and profitability for all partners. This is an excellent opportunity to shape SERENA's Alliance Partner Program and help it evolve.

Partner Newsletter

A monthly communication that announces new sales tools, product updates, marketing programs and other valuable information. This information is also available in *Partner Connection*.

Joint Collateral

A joint marketing material may be developed in conjunction with SERENA to showcase partner solutions and joint value propositions. Examples are Partner Solution Brief and "At-a-Glance" documents.

PR Opportunities

Opportunities exist for all SERENA Alliance Partners who wish to issue a press release. Press release including content related to the alliance with SERENA or mentions SERENA products must have the proposed press release reviewed and approved in writing by SERENA prior to distribution. The approval process will require at least 15 business days to be completed and may require additional lead-time for SERENA Alliance Partners outside the United States.

Market Development Funds

The SERENA Alliance Partner Program offers its participants the opportunity to request funding to help offset the cost of SERENA-related marketing activities. Contact your Partner Sales Representative for guidance on proposal development.

Marketing Events

Events are scheduled to offer SERENA Alliance Partners the opportunity to participate in virtual web seminars, as well as local seminars.

Seminars

Periodically, SERENA may offer SERENA Alliance Partners the opportunity to participate in solution webinars and/or seminars that address a myriad of topics, including industry trends and IT issues.

Trade shows and regional user group meetings

SERENA participates in a variety of trade shows and user group meetings at the regional and national level. SERENA may offer SERENA Alliance Partners a number of joint marketing opportunities, including:

- Pre-event promotion activities
- Event-related web exposure
- Demo station and/or main stage presentation
- Participation in SERENA booth
- Partner-specific signage and collateral
- Post-event leads

Beta programs

SERENA Alliance Partner may participate in the beta / early release programs where SERENA introduces them to new product features and functionality. The beta / early release program will allow SERENA Alliance Partner teams to preview the new release and prepare to sell the new version as soon as it becomes generally available. The goal is to ensure that SERENA Alliance Partners know of changes that may potentially affect their custom solution. In addition, SERENA Alliance Partners can begin creating solutions using the new product features to add new functionality.

The beta / early release program is for SERENA Alliance Partners.

Chapter V

Training

To better understand SERENA solutions, enablement and training tools are available for SERENA Alliance Partners.

Partner Enablement

Designed to provide SERENA Alliance Partners with easy access to the same sales tools that the internal SERENA sales force receives.

- Web based presentations
- Self-paced computer based training
- Instructor-led classroom

For more information about Partner Enablement program, visit the SERENA *Partner Connection* web site.

SERENA Education Center

Provides the professional knowledge and skills for the implementation and administration of SERENA products.

- Public Classes – These are classes that any SERENA employee, customer, consultant or partner can attend. It consists of instructor-led classroom training with live software.
- Online Classes - These are classes offered over the Internet. The student will be able to hear and talk directly with the instructor.

Sales Training

Provides tools that allow SERENA Alliance Partners to become proficient at selling SERENA solutions.

Partner Connection - SERENA Alliance Partners will find sales presentations as well as recorded sales presentations on SERENA *Partner Connection* web site, the Serena partner extranet. There are sales scripts available to allow a SERENA Alliance Partner to call on their prospects and help them position SERENA products.

VAR ONLY - To ensure a consistent presentation of the SERENA solutions, VAR partners will be asked to give sales presentations to the SERENA Partner staff.

Sales Training Testing will be in the form of the following:

- Give the SERENA Corporate Overview and ALM presentations to a member of the SERENA team.
- Role Play with a SERENA team member in a simulated sales call

Technical Sales Training provides tools that allow a SERENA Alliance Partner to become proficient at addressing more technical questions about SERENA solutions. Technical Training will consist of:

- Product Demo scripts and demo data
- Technical knowledge testing

Chapter VI

Certification Programs

Benefits of Certification:

Certification is a rigorous and demanding process, but demonstrates a meaningful accomplishment that is well respected among peers. SERENA Certification confers professional recognition and validates achievement. A SERENA Certification logo is a badge of excellence that you can be proud to display on your business cards. Earning recognition as a SERENA Certified Professional sets you apart from the competition and delivers real market power.

Partner certification allows SERENA Alliance Partner's employees to earn highly valued credentials and entitles them to present themselves as SERENA Certified Professionals (SCP) or a SERENA Certified Instructors (SCI).

Completing the Certification program requirements entitles you to present yourself as one of the following, in a specific discipline or product.

- SERENA Certified Professional (SCP)
- SERENA Certified Instructor (SCI)

SERENA Authorized Training Provider Program enables a SERENA Alliance Partner company to become an Authorized Training Providers and to have its SCP or SCI employees deliver official SERENA product training using SERENA's official course materials.

Chapter VII

Partner Connection

Partner Connection is SERENA Alliance Partners' password protected website. *Partner Connection* provides a wealth of information that SERENA Alliance Partners can access for positioning and selling SERENA products and solutions.

Partner Connection Dashboard

The Dashboard is your homepage on *Partner Connection*. SERENA Alliance Partners will find information about current events as well as general information. Depending on your partner type, you will see specific information that has been tailored just for you.

On the left side of the Dashboard page, you will see menus that allow you to access and navigate to other components of *Partner Connection*.

Partner Connection Library

The Library is your main resource for getting helpful information to position and sell SERENA products and solutions. The Library has many categories of information that help define specific information like Compliance, ALM, Sales Tools, *etc.*

Information in the Library can be set up as a Subscription that will send you alerts when new content is added (or updated).

Partner Connection Partner Profiles

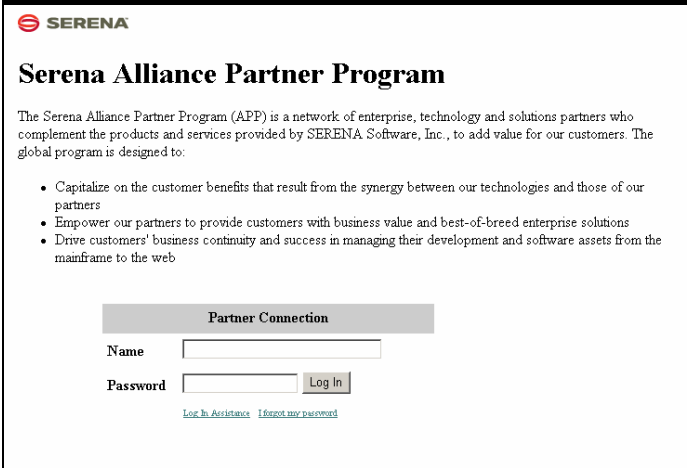
Partner Profile pages are used as the collection point for partner information. General information like your company name, URL, description of your company, products you support, and contact data are maintained in the partner profiles. This information is very important to keep current as it is used to drive the partner pages on the SERENA Corporate web site. (See Chapter III, Requirements – Definitions.)

The Contacts section of the profile is where a list of partner employees is maintained. Each partner employee's username and password is also maintained there.

A partner employee can be set up to be a "partner administrator" for your company, which will allow that person to add/edit/delete other partners employees for you company.

Accessing *Partner Connection*

Login page (<https://partnerconnection.allegis.com/>)



The screenshot shows the login page for the Serena Alliance Partner Program. At the top left is the SERENA logo. The main heading is "Serena Alliance Partner Program". Below this is a paragraph describing the program as a network of enterprise, technology, and solutions partners. A bulleted list follows, detailing the program's goals: capitalizing on synergies, empowering partners, and driving business continuity. At the bottom, there is a "Partner Connection" header, a "Name" input field, a "Password" input field, and a "Log In" button. Two links, "Log In Assistance" and "I forgot my password", are located below the password field.

Partner Connection access requires a username and password.

To learn more about navigating *Partner Connection*, log into *Partner Connection*, click on the LIBRARY menu option, and click on the ABOUT PARTNER CONNECTION category. You will find documents, presentations and recorded WebEx session describing how to use *Partner Connection*.

Chapter VIII

SERENA Alliance Partner Program FAQ

Answers to your questions about the SERENA Alliance Partner Program.

Enrollment

How do I become a SERENA Alliance Partner?

The SERENA Alliance Partner Program requires that you first complete your application. When your application is approved, you will sign a SERENA Alliance Partner agreement for your partner type. Please contact your local Partner Sales Representative for details.

Contracts

How do I renew my SERENA Alliance Partner Program contract?

The SERENA Alliance Partner Program requires that you renew your contracts yearly. Please contact your Partner Sales Rep (PSR).

What benefits are included in my SERENA Alliance Partner Program?

Refer to the current SERENA Alliance Partner Program Guides and FAQs, located on *Partner Connection*, for complete information on the program.

Education Services

What training courses are available?

See our Course Catalog (<http://www.serena.com/US/services/education/course-catalog.aspx>) for the most up-to-date information.

Where can I order SERENA Certified Instructor training material?

You can order training materials by visiting SERENA Education Services website (<http://www.serena.com/US/services/education/courseware-license.aspx>).

Where can I find out more about SERENA Education and any SERENA Education special offers?

Visit our SERENA Education Services website for more information at <http://www.serena.com/US/services/education/index.aspx>.

How do I contact SERENA Education Services to ask a question or give feedback?

You can leave your feedback or ask questions about SERENA Education Services by emailing to education@serena.com.

Technical Support

Contacting Customer Support

There are two North American Centers located in the U.S.

- 1-800-443-1601 reaches Hillsboro, Oregon
 - Supported Products - Version Manager, Tracker, Collage , Dimensions, Tracker to TT migration
- 1-877-696-1850 answered in Woodland Hills, California
 - Supported Products - Mainframe Products, ChangeMan DS, TT, RM, Composer

Support uses a Frontline (FL) / Backline (BL) model

- FL is tasked with solving majority of cases - >75%
- BL handles the more technical cases
- Support is available 24 X 7

License Required to Access Support

In order to access support, you must have a valid SERENA software license serial number. The serial number is required to generate your entitlements (*i.e.*, the rights to access software). Your Partner Sales Representative can help you get your serial number(s).

- To create a Support login ID, use your browser to go to the SERENA Support Page (<http://support.serena.com>) and click on the CREATE NEW ACCOUNT.
- Follow the wizard to create your login
- Once the account is created, you can navigate to the Download Site and select the product of your choice.
- Some SERENA products offer an *evaluation* licenses that also allow access to support.

Chapter IX

SERENA Connect

Q: What is SERENA Connect?

A: An online user community where you can collaborate with SERENA customers, staff and partners.

Q: Where is it?

A: It's virtual. Check it out at <http://SERENAconnect.com>.

Q: Where do I register?

A: From the SERENA Connect home page, or by visiting http://SERENAconnect.com/signup_intro.aspx.

Q: I already have a DEVnet account; do I have to register again?

A: Yes, SERENA Connect has a richer profile that was not available with DevNet. This additional profile information will allow you to easily find your TeamTrack counterparts within other organizations.

Q: I'm a DevNet user--what's the difference?

A: SERENA Connect is the next version of DevNet--all content from DevNet has been moved to SERENA Connect (and now you can search it). When you visit DevNet, it will direct you to SERENA Connect, where DevNet discussions are continuing.

Q: My organization uses other SERENA products--will there be SERENA Connect groups for any other SERENA products?

A: Definitely. We have started by moving the TeamTrack DevNet content to SERENA Connect. The Collage content will follow, along with new groups for Dimensions, Mariner, Version Manager, ZMF and Tracker customers. Any suggestions for other groups are welcome.

Q: Can I invite colleagues to SERENA Connect?

A: You bet. Once registered for SERENA Connect, you can go to <http://SERENAconnect.com/invite.aspx> to invite other users to join us.

Appendix

Form: SERENA ALLIANCE PARTNER ANNUAL BUSINESS PLAN

SERENA Alliance Partner Annual Business Plan

1 Business Profile

Description of the company	Last 12 months total revenues \$_____	Revenue Composition
	Number of employees _____	Application Licenses \$___ ___%
	Corporate Address and other locations	Infrastructure
	_____	Product Sales \$___ ___%
	_____	Professional Services \$___ ___%
	_____	Support/Services
	_____	Contracts \$___ ___%
		Total \$___ 100%

Target Customer Segments	Global 1000	Primary []	Secondary []	____%	Vertical Markets
	Mid-Market	[]	[]	____%	1: _____ %
	SMB's	[]	[]	____%	2: _____ %
					3: _____ %
					4: _____ %
					5: _____ %
	<i>List primary and secondary and %ge of revenues</i>				

Geography coverage and other resources	Territory	Sales/Consulting/Pre-Sales	Technical
1:	_____	_____	_____
2:	_____	_____	_____
3:	_____	_____	_____
4:	_____	_____	_____
5:	_____	_____	_____

Existing Solution Offerings	Vertical Solution Offerings	Horizontal Solution Offerings
1:	_____	1: _____
2:	_____	2: _____
3:	_____	3: _____
4:	_____	4: _____

Other Technologies Supported	Application Infrastructure/Middleware	Hardware Vendors
	_____	_____
	Packages Apps./ISV's	Integration Technologies
	_____	_____

<p>Partner Value Added Solution Definition</p>	<p>Define your company's value-added solution, relative to selling SERENA technology: (i.e., software sales skills, application integration services, custom application development, unique vertical expertise, competitive product skills, network integration, business consulting)</p>
<p>Top 3 Business Objectives</p>	<p>List your top three goals or expected results from this partnership:</p> <ol style="list-style-type: none"> 1). 2). 3).

First Quarter
Required Action Plan

30 days

Register and set up your personal SERENA *Partner Connection* Account. If you have questions on account setup contact SERENA's Channel Marketing Program Manager at (650) 522-6600.

Schedule SERENA sales training for reps named below – contact your Partner Sales Exec for details. Sales reps that are named below must attain a minimum proficiency

Schedule SERENA technical training - complete technical proficiency training within (3) month timeframe.

Schedule an account planning session with the local SERENA Sales team or Enterprise Sales representative (ESR) for your territory. Contact your Partner Sales Exec to schedule.

ESR to identify 25 accounts with new resellers to provide sales mentorship, sales cycle development and product training.

Schedule con call to introduce you to the SERENA Sales team(s), describe the sales operations process, what information is required to provide a SERENA quote and review the SERENA Price List.

Schedule first marketing creation call and demand creation call with your Partner Sales Exec and SERENA's Channel Marketing Program Manager.

Review marketing plan template in preparation for discussion.

Develop 3 quarterly demand creation programs, one of which must include involvement from SERENA. The remaining two demand creation activities in the plan can include participation in spiff program, email campaigns, etc.

Develop press release

Expand business plan with additional marketing quarterly metrics – demand creation and lead development programs

Participate in twice monthly opportunity forecast conference calls - Contact your Partner Sales Exec to schedule first call.

60 days:

Identify first SERENA software resale opportunity – contact your Partner Sales Exec for quote and contact information to engage the SERENA ESR.

Technical resource(s) assigned in this plan must attain minimum technical proficiency. Contact your Partner Sales Exec and Partner Technical SE for details.

Schedule a meeting to plan next quarter demand creation programs with SERENA's Channel Marketing Program Manager, your partner Sales Exec and your local SERENA ESR.

Schedule semi-monthly opportunity forecast conference calls - Contact your Partner Sales Exec to schedule.

1: SERENA Go-to-Market Plan

	<p>90 days</p> <p>Identify sixth SERENA software resale opportunity - contact your Partner Sales Exec for quote and contact information to engage the SERENA ESR.</p> <p>Last 30 day period to attain minimum technical proficiency - contact your Partner Sales Exec and Partner Technical SE for details.</p> <p>Schedule semi-monthly opportunity forecast conference calls - contact your Partner Sales Exec to schedule.</p> <p>Review marketing plan with Partner Sales Exec and SERENA's Channel Marketing Program Manager to confirm execution of demand creation programs and begin planning for next three quarters.</p>		
<p>Staffing Commitments</p> <p>(List names of actual sales reps selling SERENA)</p>	<p>Region</p>	<p>Consulting/Pre-Sales</p>	<p>Technical</p>
<p>Training Plan</p>	<p>Course Name</p> <p>SERENA Sales Training</p> <p>SERENA Technical Training</p>	<p>Consulting/Pre-Sales</p>	<p>Technical</p> <p>Est. Completion Date</p>
<p>Target Customer Segments</p>	<p>Region</p> <p>Vertical Market or Named Customer Targets</p> <p>Number of customers anticipated as overlap to SERENA Named Accounts: _____</p>		
<p>Quarterly Quota (Based on rolling 12 months)</p>	<p>Region:</p>	<p>Expected SERENA Licenses Revenue: __</p> <p>Q1:</p> <p>Q2:</p> <p>Q3:</p> <p>Q4:</p>	<p>Expected Services (SERENA & Other)</p>
<p>Competitive Product Positioning Plan</p>	<p>Competitive Product / Brand:</p>		<p>Positioning / Resources vs. SERENA</p>

<p>Key Contact Information:</p>	<p>Executive Sponsor:</p> <p>Phone:</p> <p>Email:</p> <p>Sales Executive:</p> <p>Phone:</p> <p>Email:</p> <p>Regional Sales Mgmt:</p> <p>Phone:</p> <p>Email:</p> <p>Consulting/Delivery Mgr.:</p> <p>Phone:</p> <p>Email:</p>	<p>Marketing Contact:</p> <p>Phone:</p> <p>Email:</p> <p>Finance:</p> <p>Phone:</p> <p>Email:</p> <p>Operations:</p> <p>Phone:</p> <p>Email:</p> <p>Engineering/Technical Mgr.:</p> <p>Phone:</p> <p>Email:</p>
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ABOUT SERENA

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CONTACT

Learn more about the enterprise-wide power of Serena products by visiting www.serena.com or contacting one of our sales representatives in your area.



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