

Packages and Features

	 <b>GOLD</b> Success planning and orchestration	 <b>PLATINUM</b> Customer success team with designated consultant	 <b>DIAMOND</b> Elite customer success for premium clients
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Features

Customer success manager and account manager	✓	+ product consultant	+ senior product consultant
Customer success manager communication	Up to 2 hours/monthly	Up to 3 hours/monthly	unlimited touchpoints
Success plan	Up to 2 hours/quarterly	Up to 2 hours/quarterly	as needed
New features workshops	quarterly	quarterly	quarterly
Configuration and setup review	Up to 3 hours/yearly	Up to 2 hours/monthly	Up to 4 hours/monthly
Articles and videos of basic knowledge for new starters	✓	✓	✓
10% training discount	✓	✓	✓
10% professional services discount	✓	✓	✓
Renewal and upgrade plan assistance	✓	✓	✓
Strategic executive business review	—	yearly	yearly
Consultant plan review and recommendations	—	Up to 1 hour/quarterly	Up to 2 hours/quarterly
Business review	—	—	quarterly
Onsite visit by designated team	—	—	yearly

# What is Customer Success?

Customer success is the ongoing practice of delivering customer experiences that meet or exceed expectations with focus on strengthening customer relationships, providing value and maximising results.

## Customer success packages

We partner with our customers throughout their journey to ensure successful product adoption and satisfaction with a tailored success plan designed to meet their goals. We ensure our customers have access to a professional team of experts that will support them each step of the way.

## What you can get with our customer success services

### Plan for success

Get a clearly documented success plan designed for your needs

### Frequent check-ins

Success checkpoints to frequently monitor goals, key metrics and time to value

### Expert advisors

Highly experienced CSM and consultant advice and best practices for higher engagement

### Proven success methodology

Accelerate product adoption with a smooth transition

## Choose a success package

Our customer success packages are designed to ensure a successful journey from defining business goals through to ongoing process optimisation, tailored to your needs. You choose the level of engagement, customisation and guidance based on your objectives, resources and timelines.

## Differentiator between customer success vs. customer support

Whereas our Customer Support team is ready to respond to customers queries and resolve technical issues, our Customer Success team is proactively and strategically helping clients leverage their solutions so they don't miss out on an opportunity to achieve better results on an ongoing basis.

## Definitions

### Customer Success Manager:

Customer Success managers are the mentors and main points of contact that guide and create a plan for success based on the customer needs. Implies proactive interaction and consists of a business guiding the customer throughout the entire journey.

### Consultant:

A consultant is an experienced professional or technical who provides expert advice in complex systems/workflows to help clients transform the way they use their product.

### Customer Support:

The Customer Support team is the point of contact when involving straightforward assistance with technical problem solving and troubleshooting, such as bugs, integrations issues, etc.

### Account Management:

Account managers are focused on customer queries and building a long-term relationship on a case-specific basis to respond to customer needs.