opentext™

Customer Success

Handbook – Off Cloud

Overview

The Customer Success services described in this OpenText Customer Success Handbook (hereinafter referred to as "Handbook") are governed by the then-current version of the applicable Software Maintenance Program Handbook ("SMPH"). To receive these services, the OpenText Customer ("Customer") must be a subscriber, through the duration of the Customer Success services, to one of the OpenText Software Maintenance Programs. Capitalized terms referenced but not defined herein have the meaning assigned in the SMPH.

Customer's purchase of Customer Success services shall constitute acceptance of this Handbook. In the event of any inconsistency or conflict between the terms and conditions of this Handbook and any other agreement between OpenText (OT) and Customer, this Handbook shall prevail with respect to the OpenText Customer Success services provided hereunder.

This Handbook provides an overview of the services Customers receive with Customer Success services and policies for usage.

Customer Success – Program Deliverables

Customer Success focuses on the customer journey from deployment to business outcomes. A designated Customer Success Manager (CSM) works to understand Customer's business goals and objectives for the applicable software and assists Customer in achieving those goals through success planning and supporting services.

There are two Customer Success packages available: **Enhanced** and **Signature**.

- **Enhanced** includes a designated Customer Success Manager (CSM), onboarding, development of a joint Customer Success Plan (CSP), success review meetings and version currency guidance.

- **Signature** includes all the Enhanced features, plus an OpenText executive sponsor, implementation oversight, license management and success roadmap planning.

	Features and benefits	Enhanced	Signature
Service structure	**Term**	**12 months**	**12 months**
	Framework	**L.O.V.E. by OpenText**	**L.O.V.E. by OpenText**
Land together	**Dedicated CSM**	**X**	**X**
	OpenText Executive Sponsor		**X**
	Welcome event and kickoff • Contract walkthrough • License activation and support process • Objectives and outcomes workshop	**X**	**X**
Operate	**Joint Customer Success Plan (CSP)** • Documentation and review • Governance and decision-making • Proactive risk management	**X**	**X**
	Implementation oversight • Facilitation of adoption issues • Solution question/understanding • Support user adoption		**X**
Value	**Success review meeting** • CSP review and update • Objective (re)alignment and refinement • Value realization	**Bi-annual**	**Quarterly**
	License management • Compliance and renewal support • Activation/Usage reporting • Entitlement assistance		**X**

	Features and benefits	Enhanced	Signature
Expand	**Solution version currency** • Highlight key solution advances • Provide guidance on the upgrade approach and process	X	X
	Success roadmap (medium to long-term) • Definition workshop and roadmap creation • Solution roadmap discussion with Product Management • Planned upgrades and business case support		X

Success Management

Success Management includes access to a named Customer Success Manager (CSM) who will create, monitor, and update a Customer Success Plan (CSP) using the OT success planning methodology. The completed Customer Success Plan defines the Customer's vision and goals related to the use of OT software. CSM is also responsible for the coordination of the post sales experience.

Success Management is provided by the assignment of a named Customer Success Manager who can be contacted by phone or email.

The Customer Success Manager's responsibilities, across either the Enhanced or Signature package include:

• Onboard the customer to obtain contact information, document business objectives and walk through contract and licenses.

• Internally champion the Customer's interests by voicing their needs and objectives within OT.

• Act as the liaison to address the Customer's specific needs with OpenText, to promote clear communication, program coordination, and efficient escalation.

• Collaborate with the Customer to establish a Customer Success Plan (CSP) for tracking Customer's vision and goals.

• Conduct success reviews to align with Customer's strategic goals.

• Oversee the internal knowledge transfer process from OT pre-sales to ensure Customer goals and initiatives are accurately conveyed.

• Assist customer with management of OT licenses.

• Provide guidance on version information and upgrade approach.

• Coordinate product roadmap reviews to ensure Customers are aware of most current features and functionality.

• Collaborate with relevant OT or Customer personnel during implementation activity to support user adoption and business use cases for software.

Customer Success Plan

The Customer Success Plan (CSP) is the primary deliverable of the Customer Success Manager. As an industry known practice, the CSP is a tool that creates joint accountability and governance and is used to document Customer's goals and ensure outcomes. The CSM will own, manage, and maintain the CSP, in conjunction with the Customer, throughout the duration of the Customer Success contract.

Terms and Conditions

1. Customer Success is an additional program to one of the following software maintenance programs: OpenText Prime Protect or Business Support (collectively the "OT Software Maintenance Programs").

2. Customer must be a subscriber, through the duration of Customer Success, to an OT Software Maintenance Program.

3. The Customer Success program period shall be twelve (12) months unless otherwise agreed by OT and the Customer in writing.

4. Customer Success will automatically renew each year. OT will send a renewal notice prior to the end of the current term and Customer shall pay OT as invoiced. If either Customer or OT does not wish to renew Customer Success, it must notify the other party in writing of its intent not to renew at least ninety (90) days prior to the end of the then-current subscription term.

5. OT reserves the right to increase Customer Success fees in line with reasonable increased costs of service delivery on an annual basis (up to 10% per annum).

6. OpenText reserves the right to change the Customer Success services. Please contact an OpenText representative for program updates or refer to the latest Customer Success datasheet and Customer Success Handbook.

7. Unless otherwise stated, services will be provided between 8am and 5pm local time on local business days, excluding bank and local public holidays.

8. Customer Success services are delivered in the English language, although local language may be available for an additional fee

9. Customer Success delivery is provided from a location chosen by OpenText. In-country resources may be available for an additional fee.

10. Customer may purchase Customer Success experts in multiple regions for global coverage

11. If on-site services are agreed upon, any expenses for reasonable travel and lodging will be the responsibility of Customer and will be invoiced as they are incurred.

12. The terms in this Handbook shall apply to the deliverables defined herein for the Customer Success program. Any additional services requested by Customer will require a separate agreement and be subject to OT's then-current price list at the time the additional services are requested.

Learn more at
https://www.opentext.com/support

About OpenText

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