opentext™

INFODOC

Client Success Services
Private Cloud

OpenText Success Services help organizations achieve operational excellence and realize greater value from their technology investments.



Service description

Client success is the backbone of our OpenText service offerings.

That's why we provide three levels of Success Services designed to help organizations achieve operational excellence, maximize platform performance, and realize greater business value from their technology investments.

1

Standard Success

Operational confidence

Get your solution up and running with guided onboarding *and ensure ongoing platform stability with OpenText™ Success Services, standard incident support, and platform reporting.*

2

Premier Success

Technical excellence

Reduce risk and optimize solution performance *for your key use cases with technical expertise, solution oversight, go-live planning and readiness assessments, and ongoing Client Success Management.*

3

Signature Success

Business transformation

Designed for your custom and complex business needs. *Personalized, proactive engagement with your OpenText Success team, regular service reviews and technical planning, solution performance reporting, and insights that are focused on achieving your mission-critical business goals.*



Built on proven Client Success Management and technical best practices, our programs get clients up and running quickly with their OpenText solution. We provide guided onboarding, expert technical guidance, and proactive support and engagement to help organizations reduce risk, maintain platform health, accelerate adoption, and confidently navigate change.

Whether your organization requires essential operational support, advanced technical expertise, or a dedicated partnership focused on business and technical outcomes, our Success Services provide the people, processes, and insights needed to support your long-term success.

Standard Success
Your one-stop Digital + Success experience

Get live and keep your platform stable with core success services—plus the OpenText Success Portal and a named Client Success Manager, included on every tier.

Standard Success entitlements:

- Guided onboarding & entitlement activation
- OpenText Success Services
- Standard incident support with defined response times
- Service reviews and platform reporting

Plus, the Digital Success Portal (every tier):

- Welcome Kit, resource toolkits, and knowledge articles
- Digital Success Plan and Onboarding Package
- Communication templates and adoption checklist



Premier entitlements

Technical excellence—reduce risk and optimize solution performance for your key use cases

In-Region Client Success Manager

Your trusted advisor for technical success, ensuring accountability, proactive issue resolution, stakeholder alignment, and continuous service improvement to maximize business value, performance, and customer satisfaction

Requirements Workshop

Collaborate with experts in a guided design session to define business goals, capture key requirements, and create a comprehensive Business Requirements Document (BRD) that aligns stakeholders, reduces risk, and establishes a clear foundation for successful deployment.

Go-live and production readiness planning

Ensure a confident go-live with a comprehensive readiness assessment that validates your environment, reviews application health, and identifies risks early—helping deliver a smooth deployment and minimize business disruption.

Key event management

Maximize success during high-impact business events with dedicated Success Management resources, proactive upgrade coordination, and oversight to reduce disruption, protect business continuity, and ensure optimal user experience.

Performance monitoring

Proactive monitoring of system health, incident and change management, and service-level tracking to maintain performance and stability.

Customization and integration support

Expert engineers who understand your solution and quickly provide support for customizations, integrations, and third-party products to keep your business running smoothly.

Signature entitlements

Business transformation—dedicated expertise and proactive engagement that drives continuous value

Dedicated Technical Success Manager

Partner with a dedicated technical expert who provides strategic guidance, proactive solution health reviews, and service optimization recommendations—helping maximize performance, reduce risk, and drive greater value from your technology investment.

Annual Technical Health Review

Optimize your OpenText investment with a comprehensive review of solution health, architecture, and capacity. Receive expert recommendations to improve performance, reduce risk, eliminate inefficiencies, and ensure your environment is scalable, resilient, and aligned to business goals.

Enhanced response times

Reduce downtime and business impact with accelerated response times, ensuring critical issues are addressed quickly by experienced technical experts.

Success planning

A tailored Client Success Plan designed around your business needs. Using the BRD inputs, including goals, metrics, key initiatives, governance, and value tracking, the CSM will continuously update the Success Plan through all phases of your solution adoption.

Adoption and consumption planning

Drive greater business impact through strategic adoption planning that promotes effective product usage, aligns with evolving priorities, and unlocks continuous value from your technology investment.

Quarterly business reviews

Maximize value from your managed services investment with quarterly reviews that align priorities, track performance, and identify opportunities for continuous improvement.



opentext™

Service offerings comparison chart

		Standard	Premier	Signature
Client Success Management	Digital welcome experience	✓	✓	✓
	Client Success Manager	✓	✓	✓
	Onboarding package	✓	✓	✓
	Service reviews and reporting	✓	✓	✓
	Success planning	✓	✓	✓
	Quarterly business reviews			✓
Product adoption	Access to Success Portal and knowledge articles and documentation	✓	✓	✓
	Business Requirements Workshop		✓	✓
	Product upgrade planning		✓	✓
	Solution adoption and consumption reviews			✓
Technical health	Incident management	✓	✓	✓
	Key event management		✓	✓
	Technical Success Manager		✓	✓
	Go-live planning and production readiness reviews		✓	✓
	Performance monitoring		✓	✓
	Annual technical health review			✓
	Incident trend analysis for proactive problem management			✓
	*Technical Success Services (Custom)			✓
	*Enhanced response times			✓
Issue resolution	Technical support	Response times: Critical P1 – 1 hr, 24×7	Response times: Critical P1 – 1 hr, 24×7	Response times: Critical P1 – 15 mins, 24×7

*Represents entitlements that can be customized at an additional fee.

Value-Add services

Learning & Adoption Services ›

OpenText Learning Services provides training, learning paths, subscriptions, certifications, and adoption services that help users build expertise, accelerate product adoption, improve performance, and maximize value from OpenText solutions.

Professional Services ›

OpenText Professional Services helps organizations design, deploy, modernize, and optimize OpenText solutions with expert consulting, integration, cloud, AI, and cybersecurity services to accelerate business outcomes and reduce risk.

OpenText Client Success Services helps organizations maximize the value of their technology investments through proactive guidance, technical expertise, and outcome-focused engagement. Whether you need operational support, advanced technical oversight, or a strategic partnership, our Success Services provide the people, processes, and insights to accelerate adoption, optimize performance, and drive long-term business success.

Ready to unlock greater value from your OpenText investment? Contact us today to learn how our Standard, Premier, or Signature Success Services can help your organization achieve its business and technology goals faster and with confidence.

Copyright © 2026 Open Text • 10.26 | 253-000013-001