

Client Success Plan

Sample template

Name

Title

Date



OPEN POSSIBILITIES

Client Success Plan

KEY HIGHLIGHTS		CLIENT OBJECTIVES		
KEY CHALLENGES	KEY BENEFITS	MILESTONES	SUCCESS CRITERIA	SUCCESS MEASURES
		Actions & Dates		

Client Success Plan

SAMPLE

KEY HIGHLIGHTS

- Information management modernization initiative underway to improve compliance, governance, and operational efficiency.
- Deployment targeted for completion within **6 months**, with go-live planned for **April 2026**.
- Expected **80% user adoption** within 3 months of launch.
- Targeting **30% reduction in document processing time** and **20% improvement in user satisfaction**.

CLIENT OBJECTIVES

- AcmeCo Capital has invested in OpenText's Information Management Solution to support the following strategic goals:
- Enhance regulatory compliance (e.g., FINTRAC, GDPR, OSFI)
 - Improve operational efficiency by automating document workflows
 - Enable secure and scalable data governance
 - Accelerate digital transformation across customer-facing and back-office systems
 - Reduce risk associated with data silos and manual processes

KEY CHALLENGES

- Fragmented information systems across departments
- Manual document handling leading to errors and delays
- Limited visibility into data lineage and audit trails
- Compliance risks due to inconsistent retention policies
- Customer frustration from slow onboarding and service processes

KEY BENEFITS

- ✓ Centralize and secure content across the enterprise
- ✓ Automate compliance workflows and reduce audit preparation time
- ✓ Improve employee productivity through intelligent search and retrieval
- ✓ Enhance customer experience with faster onboarding and service delivery
- ✓ Gain actionable insights from structured and unstructured data

MILESTONES

Actions and dates

- ✓ Kickoff 1/12/25
- ✓ Implementation start – 1/6/26
- Midpoint review – 1/3/26
- Go-live - 15/4/26
- User enablement - 30/4/26
- Adoption review – 15/5/26
- Success measures review – 15/6/26

SUCCESS CRITERIA

- Time to value: Deployment completed within 6 months
- User adoption: 80% of target users actively using the system within 3 months post-launch
- Compliance metrics: 100% alignment with internal audit and regulatory standards
- Operational efficiency: 30% reduction in document processing time
- Customer experience: 20% improvement in onboarding satisfaction scores

SUCCESS MEASURES

- ✓ **Deployment complete within next 6 months**
- ✓ 80% user adoption rate
- ✓ 100% compliance audit readiness
- ✓ 30% decrease in document processing time
- ✓ 20% increase in end user satisfaction



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