

Customer Success Plans

What are they and how can they help you to succeed?



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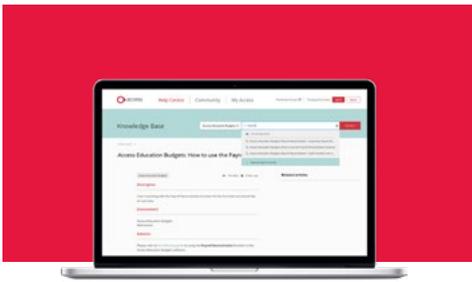
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What are Customer Success Plans?

At Access we know why our customers choose our products, it's because you want to be more successful. Helping you to get the best from your Access software is really important to us, so our Success Plans go beyond technical support to provide you with the tools and guidance you need to succeed.

Your options include taking advantage of our E-learning content, attending our Success webinars, or choosing to have your own designated Technical Support Engineer for advice and assistance. With our Success Plans, it's not a matter of how you can achieve more, but how quickly you want to accomplish this – and how you can sustain that success as the technology and your business evolve.

We recognise that every business using one or more of our vast range of business solutions is different, with its own particular support requirements. At Access we offer three Customer Success plan levels – Essential, Standard and Premier – to allow you to choose the level of engagement that's right for your business.



The Essential Plan

The online service

Our Essential Plan is available to all Access customers as part of your license fee and provides you with easy-to-access online support for all your queries, facilitated via our Customer Success Portal.

The Standard Plan

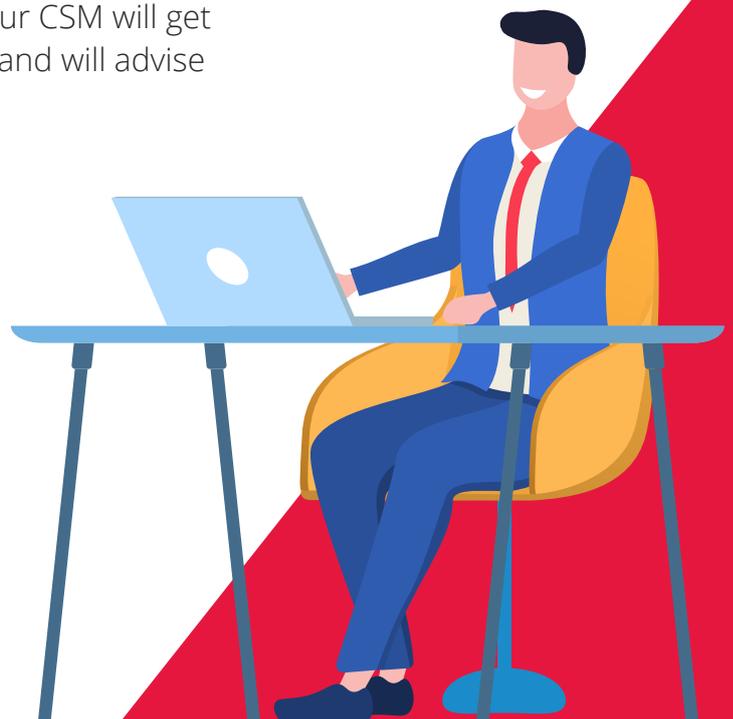
Get answers faster

As a Standard Plan customer you benefit from faster response times and can access our support teams via telephone and live chat, as well as through our Customer Success Portal. To help your team be more productive, you are provided with continued access to our e-learning content as well as a programme of Success webinars designed to keep you up to date with new features and share best-practice advice and guidance.

The Premier Plan

Boost productivity with direct access to the experts and achieve a higher return on investment

Our Premier Plan enables your team to achieve more and improve productivity through an ongoing relationship with your own designated Customer Success Manager. Your CSM will get to understand how you're using the technology and will advise you how to get more from it.





ESSENTIAL

Included with your Access license fee, providing a reactive online support experience

STANDARD

Provides you with faster response times and access to our advisory services to enable your team to be more productive.

PREMIER

Provides you with your own proactive designated Customer Success Manager and a designated support team. Your personal team of experts understand how you're using Access technology and can advise on how to increase productivity and achieve more.

SUPPORT SERVICES

Problem Resolution Support			
Service Hours*	9am - 5pm	Extended Day 8am - 6pm	Extended Day 8am - 6pm
Web	✓	✓	✓
Service Channels	Telephone	✓	✓
	Live Chat*	✓	✓
Designated Support Team Enjoy the consistency of dealing with the same designated support team, each time you contact support			✓
Initial Response Time Guidelines	P1 - up to 2 hrs P2-4 - up to 2 Business Days	P1 - up to 1 hr P2 - up to 2 hrs P3 - up to 4 hrs P4 - up to 1 Business Day	P1 - 1 hr P2 - up to 2 hrs P3 - up to 4 hrs P4 - up to 1 Business Day
Number of people permitted to raise a support case	2	4	8

ADVISORY SERVICES

Customer Success Portal Providing a wealth of knowledge-base articles and access to a user community	✓ unlimited users	✓ unlimited users	✓ unlimited users
Web		✓	✓
Task Based Advice and Guidance	Telephone		✓

KNOWLEDGE

Product E-Learning ¹		4 users	unlimited users
Success Webinar Programme	Recorded sessions	✓	✓

CUSTOMER SUCCESS SERVICES

Service Delivery Management		Access to a team of Customer Success Managers	Designated Customer Success Manager
Access to a portfolio of Proactive Services			Success days provide you more time with the experts. Number of days included is dependent on success plan spend or additional time may be purchased.
Product Roadmap Briefings		✓	✓
Tailored Success Action Plan			✓
Customer Success Reviews			✓ (frequency dependent on plan spend)

1 e-learning is not available for all products, click [here](#) for current list

* Service is delivered Monday -Friday, as per the statement of works

* Live Chat - Where applicable

The Essential Plan

The online service

Support Services

- Unlimited Problem Resolution Support via online Customer Success portal
- 9am-5pm Service Hours
- 2 Named Support Contacts
- P1 – 2 hr response time

Advisory Services

- Product Knowledge Base
- Online User Community

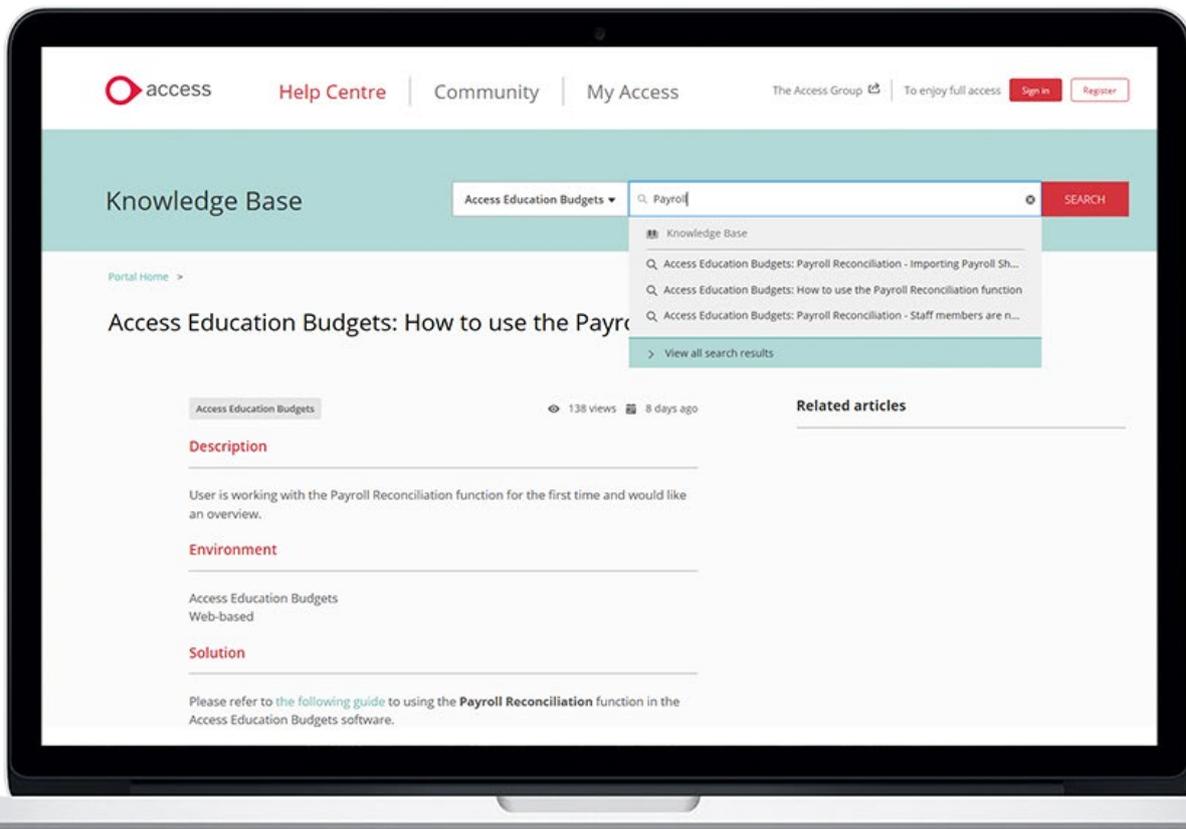
Knowledge

- Library of Recorded Webinars

The Essential Plan is included with your Access software fee and provides easy-to-access online support for all your queries, facilitated via our Customer Success portal.

Our online portal allows you to raise support cases 24/7. These will be handled by our team of Technical Support Engineers during the hours of 9am-5pm, Monday-Friday.

With access to our comprehensive Customer Success portal you will have a wealth of Knowledge Base articles and webinar content, giving you the digital tools to find answers to questions quickly and easily.



The Standard Plan

Get answers faster

Support Services

- Telephone Support
- Unlimited Problem Resolution Support
- Online support via Customer Success portal
- Live Chat¹
- Extended Support Hours 8am-6pm²
- Faster Response times
- 4 Named Support Contacts
- P1 – 1 hr response time
- P2 – 2 hr response time
- P3 – 4 hr response time

Advisory Services

- Task based 'How to' Advice and Guidance - online
- Access to wealth of Knowledge Base articles
- Online user community

Knowledge

- Product E-Learning – 4 users
- Success Webinar programme

Success Services

- Access to a team of Customer Success Managers

Support Services

As a Standard Plan customer you benefit from being able to raise support cases by telephone and live chat as well as via our Customer Success portal. Our expert Technical Support Engineers deliver support services from 8am -6pm, Monday to Friday¹ and with a Standard Plan you receive priority response times.

Advisory Services

Customers are provided with access to the Customer Success portal, which contains a wealth of knowledge base articles, access to online communities of other users and a library of webinar content delivered by our product experts.

¹Where applicable

²Service is delivered Monday - Friday, as per the statement of works.



In addition to the content we provide on our Customer Success portal and through our E-Learning, we appreciate that sometimes your team may wish to ask advice from an expert about particular tasks. Task-based advice and guidance is available through our support teams for our Standard plan customers, to assist with those 'How do I...?' queries.

Knowledge

Having a Standard Plan allows you to benefit from our product E-Learning content hosted in our award-winning E-Learning platform. Take advantage of four users to access the E-Learning content² for your specific product alongside other content provided in Access Learning Lite provided as part of Access Workspace.

Our customer success team runs a comprehensive programme of Success webinars designed to share best-practice advice and guidance, help improve productivity, and keep you abreast of new features and functionality.

Success Services

A customer with a Standard Success Plan can expect the following:

- **Access to a team of Customer Success Managers**
- **First Year Flightpath Check-In** – to make sure everything is going as planned and to ensure you're achieving the business outcomes you'd set out to achieve.
- **Annual Check-In** – our Customer Success Managers will reach out to you to see how things are progressing and understand any queries or challenges you may have.
- **Support Case Management**



²[Click here](#) for the products for which E-Learning content is available.

The Premier Plan

Boost productivity with direct access to the experts

Support Services

- Unlimited Problem Resolution Support cases
- Telephone Support
- Live Chat¹
- Extended Support Hours 8am-6pm²
- P1 – 1 hr response time
- P2 – 2 hr response time
- P3 - 4 hr response time
- 8 Named Support contacts

Advisory Services

- Task based 'How to' Advice and Guidance – online & telephone
- Access to wealth of Knowledge Base articles
- Online user community

Knowledge

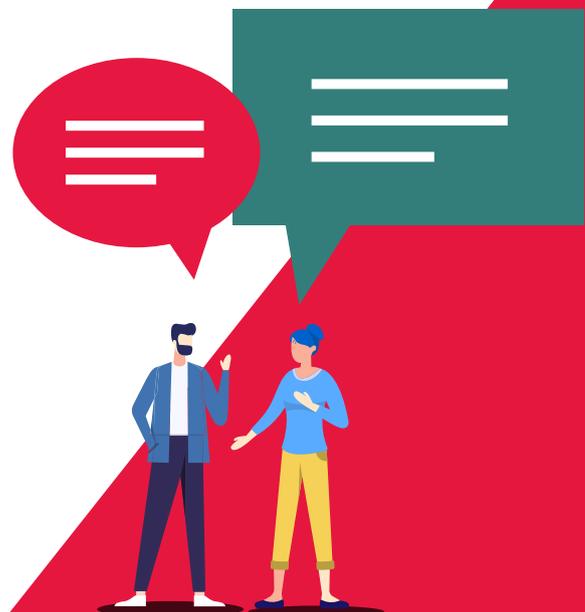
- Product E-Learning – unlimited users
- Success Webinar Programme

Success Services

- Designated Customer Success Manager
- Access to a portfolio of Proactive Services
- Product Group Roadmap Briefings specific to Premier customers

Our Premier Plan enables your team to maximise productivity. Get the best return from your investment in the technology by taking full advantage of having your own designated Customer Success Manager and access to a support team. Use their expertise to enable your team to achieve more.

Through a continuing relationship with a team of Access experts, they understand how you're using our technology, provide best practice advice and guidance to help boost productivity.



¹Where applicable

²Service is delivered Monday -Friday as per your statement of work.

³There is a minimum spend for a Premier Success Plan of AU\$2.5K. For a Customer Success Manager to be assigned, a contract must meet this criteria.

“ I would definitely recommend this to others. The days spent with my CSM have proved invaluable, not only to explore ideas for the way forward to gain the most out of the system, but also having that expertise when wanting to introduce new workflows/automation to ensure what you’re doing is correct. ”

Advisory Services

With a Premier Tailored Success Action Plan you have full access to the Customer Success Portal, which contains a wealth of Knowledge Base articles, access to an online community of other users and a library of webinar content delivered by our product experts.

In addition to the content we provide on our Customer Success portal and through our E-Learning, we appreciate that sometimes your team may wish to ask advice from an expert on particular tasks. Task-based advice and guidance is available through the designated support team to assist with those ‘How do I...?’ queries.

Knowledge

A Premier Plan allows you to benefit from our product E-Learning content hosted in our award-winning E-Learning platform. Take advantage of unlimited users to access the E-Learning content¹ for your specific product, as well as a wealth of additional content provided in Access Learning Lite provided as part of Access Workspace.

Our Customer Success team runs a comprehensive programme of Success Webinars designed to share best-practice advice and guidance, help improve productivity with the technology, and to keep you abreast of new features and functionality.

¹ [Click here](#) for the products for which E-Learning content is available.

² The number of reviews a Premier customer receives is dependent on plan spend.

Plan spend	>AU\$2.5K	>AU\$5K	>AU\$25K	>AU\$50K
Reviews per annum	2	4	6	12

Success Services

Designated Customer Success Manager

As a Premier customer you will have a designated Customer Success Manager who understands your business, how you’re using the technology and your business goals. They will work proactively with your Access Account Team to recommend solutions to solve your business challenges. They will deliver:

- **Tailored Success Action Plan** – agreeing jointly a set of objectives to ensure you’re getting the best return on your investment in Access technology.
- **Customer Success Reviews** a regular check point to review the objectives set out in your Success Plan and to understand any new goals or challenges. Frequency (monthly, quarterly, bi-annually, annually) dependent on plan spend².
- **Proactive Case Management** – making sure cases are progressed, working with support managers and development teams to ensure a resolution. Your Customer Success Manager will also work in conjunction with Technical Support to understand trends and work with you to prevent problems occurring.
- **Proactive Advice and Guidance** – delivered either by your own Customer Success Manager or by connecting you with other experts through success days.
- **Product Updates** – keeping you up to date about new releases and functionality that may be pertinent to your business.
- **Customer Advocate** – acting as your advocate in Access, to answer any queries or to connect you with the right resources.

Success Days

Reach your goals faster with proactive advice and guidance

- **Our Customer Success teams** have designed a portfolio of proactive services to help customers reach the business outcomes they are looking to achieve sooner. Premier customers can get direct access to these services by using their inclusive days and/or by purchasing additional days. Customers without any inclusive days/points may purchase these separately.
- **Premier Product Roadmap Briefings**
Premier customers will benefit from Product Roadmap Briefings, allowing Premier customers both to understand future plans for the technology and to influence the roadmap.

“ The success plan and the regular catch ups mean we stay on track and maintain momentum on improving how we use the system ”



E-Learning Product List

Workspace products

- Access Analytics
- Access Purchasing - Approve
- Access Purchasing - Capture
- Access Purchasing - Document
- Access Purchasing
- Access Expense

Digital Learning and Compliance

- Access LMS

Education

- Education Budgets
- Education Finance

Financial Management Systems

- Access Financials
- Dimensions
- Access Financial Operations

People

- Access Recruit
- Select HR
- Select Pay
- Workspace HomeWork
- Access TeamSeer
- People XD
- People HR

Hospitality

- Access People
- Collins
- EPOS
- Procure Wizard
- Access Maintain (ProNett)

Health and Social Care

- Access Care Planning
- Care & Clinical
- Medication Management
- People Planner
- WebRoster

Not for Profit

- Gamma
- ThankQ
- ThankQ SaaS
- Access NFP Website

Recruitment

- Access RDB
- Access Recruitment CRM
- Pay & Bill
- Profile
- Screening
- Volcanic

Supply Chain

- FactoryMaster
- Orchestrate
- Q-Series
- ASC

