UNIT4

Service Terms
Success4U

Partner Edition

Success4U Partner Edition - Overview

Success4U Partner Edition includes the following services:

- Tailored Success Planning with customer success manager guidance;
- Customer Support access;
- End User Education and Product Guidance; and
- Community4U Access.

The following sections cover the scope of each of the above services.

Customer Success Management

Unit4 will allocate a Customer Success Manager (CSM), whose primary aim is to make sure you not only use our product effectively but also get the most value out of it. Your CSM will check in with you to understand your business goals and challenges. They will help you to identify how to leverage your Unit4 software and services to enable the outcomes your business requires and agree with you how and when to execute each activity. This will be captured in your tailored Success Plan.

A **"Success Plan"** outlines the steps and milestones necessary for you to achieve your desired business outcomes with the Unit4 solutions. It is a collaborative, evolving document which aims to track the outcomes you plan to realize with Unit4 solutions.

A Success Plan agreed with your CSM may include:

- *Goals and Objectives:* Clearly defined objectives that we aim to enable using Unit4 products and Success Catalogue services.
- *Timeline:* A timeline or schedule outlining when specific milestones or goals should be accomplished.
- *Key Performance Indicators (KPIs):* Metrics and indicators that measure the success and effectiveness of the plan.
- *Action Items:* Specific tasks or actions that both Customer and the Unit4 team need to undertake to reach the defined goals.
- *Responsibilities:* Clear delineation of responsibilities between the Customer and the Unit4 team, ensuring accountability on both sides.
- *Resources Needed:* Identification of any resources, tools, or support required to execute the Success Plan successfully.

If you ever have questions, run into issues, or want to explore how to get even more out of the Unit4 product, your CSM is your go-to person.

Collaboration

The roles and responsibilities of the Customer, Partner, and the Unit4 CSM are outlined in the table below. This framework is designed to promote clarity and collaboration across the engagement lifecycle, ensuring shared accountability for outcomes while respecting each party's area of expertise. The table is indicative only and designed to be representative but not exhaustive in illustrating the collaboration between the three parties. Detailed activities and deliverables will be further defined in associated Statements of Work or Success Plans as appropriate.

The Partner, Customer, and CSM are expected to collaborate on a regular basis, with tri-party meetings focused on project status and progress towards the agreed customer objectives.

Activity / Responsibility Area	Customer	Partner	Unit4
Define strategic goals and success criteria	A	C	C
Provide SaaS platform	I	I	A/R
Configure platform to meet requirements (within standard config)	C	A/R	C
Manage project implementation and milestones	C	A/R	C

Activity / Responsibility Area	Customer	Partner	Unit4
Provide Customer Success Management (CSM)	C	I	A/R
Ongoing customer support (product break / fix)	C	I	A/R
Monitor and report on platform adoption	R	C	A/R
Advise on value realisation potential	C	C	A
Achieve value realization against strategic goals	A/R	C	C
Manage change requests / enhancements (within standard limits)	R	A	C
Provide enablement and training	R	A/R	C

R = Responsible, A = Accountable, C = Consulted, I = Informed

Education

You will receive access to our standard education catalogue which will help your end users understand how to leverage Unit4 products in line with best practice. This will help drive adoption and end user satisfaction and is included at no additional cost.

Success4U Essentials education content will be provided for ten (10) named users.

This content will be assigned to you on commencement of your subscription and will be updated periodically during this time. You will need to provide the names of your identified education users during your onboarding.

You can update your named users once per year if required. Instructions to request this are available on Community4U.

Additional education content is available for purchase through the Success Catalogue to enable you to expand the scope and depth of enablement across your team or, can be provided by your Partner.

Customer Support

Success4U Partner Edition includes access to our standard support offering detailed here.

Community4U

You have access to a rich source of documentation, knowledge, and peer to peer support via our Community4U portal. In many situations, customers can address their questions or issues directly without the need to raise a case with the Support Desk.

Community4U also houses our Customer Success Hub with best practices and details for fast-track onboarding. Customers can learn how to raise a case and read knowledge articles to aid self-service with your Unit4 products.