

UNIT4

Service Terms Success4U – Professional for FP&A



1. Overview

This is a subscription-based Success Service offering that provides Customers with enhanced access to Unit4 FP&A expertise, guidance, and support throughout their lifecycle with Unit4 Financial Planning & Analysis (“**S4U Professional for FP&A**”).

S4U Professional for FP&A brings together the following core components to drive value realization:

- Ongoing, integrated partnership with the Customer Experience team;
- Tailored success planning;
- Eligibility to purchase Success Points; and
- Access to preferential pricing within the Success Catalog when using the above-mentioned Success Points.

No Success Points are included as standard in the S4U Professional for FP&A subscription.

Customer is required to provide Unit4 with a named individual who will be the Customer representative in relation to any discussions concerning S4U Professional for FP&A activities.

2. Success Planning

Unit4 will deliver the following Success Activities to support the creation, refinement, and execution of a plan which describes the steps and milestones necessary to achieve the Customer’s desired business outcomes with Unit4 Financial Planning & Analysis (a “**Success Plan**”). These activities help maintain alignment between the Customer’s strategic objectives and their use of Unit4 Services. The activities included within the S4U Professional for FP&A subscription are listed below along with their associated details.

Unit4 will:

- **Conduct a value readiness assessment:** Measures FP&A readiness across a holistic set of success-driving factors, helping to make sure the Customer is prepared to maximize their investment with Unit4 and sets the foundation for the creation of the Success Plan. It is reviewed on an annual basis.
- **Define and manage the FP&A Success Plan:** Support the creation and ongoing refinement/update of a Success Plan, which may include a timeline, key success measures, action items, responsibilities and required resources. The Success Plan is iterative and may be updated throughout the subscription term. It is a planning tool only, and it does not constitute a commitment by Unit4 to deliver services beyond those expressly set out in these Service Terms or applicable Service Descriptions.
- **Provide FP&A Success Plan updates:** On a quarterly basis, track progress against goals defined in the Success Plan, while updating based on changing factors, Customer strategies, and product capabilities.
- **Conduct FP&A adoption reviews:** Once a year, Unit4 will conduct a deep dive into the adoption and usage of the system, highlighting usage stats and key areas for improvement.
- **Business review meetings:** Twice a year, a meeting in which Unit4 and the Customer walk through the FP&A Adoption Review with a presentation of adoption trends and areas for improvement. The Success Plan will be reviewed with a discussion around key success measures, solution-alignment to Customer objectives, and areas for improvement. The Customer should update on priorities, upcoming changes, or any factors that might influence the Success Plan so that next steps are agreed together.
- **Tailored release notification:** On a quarterly basis, highlight newly released or changed features that are relevant to the Customer’s industry, location and solution set.
- Guide the Customer to **self-serve** wherever possible.
- Advise on the optimal combination of Success Services to support the Customer’s objectives;
- Coordinate internally to facilitate delivery of the Success Services the Customer procures; and

- Provide a designated point of contact.

3. Education

Access will be granted to the end-user education content which may include digital learning materials designed to support effective day-to-day use of Unit4 Services.

Education content will be provided for one hundred (100) named users. You will need to provide the names of your identified named users during your onboarding, and you can update your named users once per year.

Additional System Administration education content is available for purchase through the Success Catalog to enable you to expand the scope and depth of enablement across your super users.