

Premier Success: Gold

Introduction

Kofax Customer Success is delighted to be part of your automation experience. We're looking forward to working with you!

Before we get started on this journey together, there are a few things you need to know about the Kofax Customer Success Gold service that will help us to engage with each other smoothly and make sure you can get the best from your Kofax experience.

Getting Started with Kofax Customer Success

Kofax Customer Success Gold is a more personalized service than our standard Silver program, adding two of the most commonly requested capabilities: a named CSM and implementation mentoring.

Named Customer Success Manager (CSM)

We'll assign a specific CSM to work proactively with your team to understand what success looks like for you and help you get exactly what you need from Kofax when you need it. Your CSM will arrange

- bi-weekly action updates via email
- monthly virtual calls
- executive business reviews (remote)

What we need from you: an agreed set of stakeholders to commit to participate in these activities and take action where required, together with their contact details.

Customized Success Plan

Your CSM will work with you to build out a customer success plan fully tailored to your needs. We'll seek to understand what success looks like to you, and how you intend to measure progress toward that goal. We'll also use this to



TERMS OF ENGAGEMENT

align with you on key milestones and shared dependencies across your whole program lifecycle, and offer ways to work together to mitigate risks.

What we need from you: time with your program lead to review and agree your success plan. We'll update this as necessary in our monthly calls.

Executive Business Reviews (EBR)

Immediately after your first implementation goes live, your CSM will schedule your first EBR as a virtual call, and will follow this with a steady cadence of executive business reviews thereafter to stay closely aligned on your objectives and provide advice and guidance on your strategic plans to reach these.

What we need from you: share your objectives and strategic planning; commit to participate in EBRs

Implementation Health Checks

Your Kofax CSM has engaged an elite team of Kofax Intelligent Automation experts to conduct comprehensive solution design or configuration reviews to provide recommendations on optimizing performance and scalability across the existing platform.

What we need from you: work with your CSM to identify highest priority pain points or areas of risk, in order to identify the activities that will best support your success.

Training and Certification

Training is such a critical part of customer success that Kofax provides this free of charge to all our subscription customers. Use these materials to skill up citizen developers and product experts within your team, as well as training specialists who can then train other team members as you create and evolve your custom training plans.

You'll still need to certify team members separately to validate their knowledge. You can find the list of available certification courses on our [website](#).

What we need from you: work with your CSM to define a training roadmap for your team.

Kofax Community Premium Content

Team members registered with Kofax Technical Support can continue to make use of the Kofax Customer Community, but your Gold subscription will also unlock the exclusive Customer Success forum, where you and your team can find additional content.

What we need from you: a list of all team members who should have access to the Kofax Community, together with their contact details.

Kofax 10x5 Technical Support

As part of your subscription, you'll also have access to our standard online technical support service via the Kofax Customer Portal. Individual team members who have been certified on your Kofax product(s) will be able to raise tickets to ask technical questions, get assistance with technical troubleshooting, and suggest enhancements to product features.

What we need from you: a list of team members who have gone through Kofax product certification (outside the scope of this package), and have passed the certification exam, together with their contact details.

 Reference Chart

Kofax Customer Success Gold provides our customers with the following services to drive success:

- A named **Customer Success Manager** who will build a personal relationship with you and your team to understand what success looks like for you and help you get what you need to get there
- A **customized success plan** tailored for your objectives, with quarterly **Executive Business Reviews** to help you monitor our partnership together and your progress toward success (remote)
- Annual **Health Checks** to help you optimize your solution
- Access to **exclusive Gold content** in our Kofax Customer Community
- Annual subscription to the **Kofax Learning Cloud** to help your team build the key capabilities that your solution will require
- **Online technical support** via the Kofax Customer Portal (10 hours per day, 5 days per week during local business hours)

	Silver	Gold	Platinum
Subscription customers			
CSM support	Light touch Shared community CSM	Medium touch Named CSM	High touch Named CSM Accelerated SLAs
Customized success plan	–	✓	✓
Executive Business Reviews	–	✓ remote only	✓ remote, plus 1 on-site per year*
Technical Account Manager (TAM)	–	–	Named per product, scales with purchase
Technical support via Kofax Customer Portal	10x5 online support	10x5 online support	24x7 online & phone support**
24x7 access to Kofax Customer Community	✓	✓ Includes access to Gold content	✓ Includes access to Gold and Platinum content
Regular review of Kofax product roadmaps	–	–	✓
Kofax Learning Cloud	✓	✓	✓

* Customer will be liable for cost of travel & expenses

** English only, limited to critical cases only outside of business hours

If you find you need a deeper level of assistance from Kofax on any of these topics, please contact customersuccess@kofax.com to talk with us about moving to our Premier Platinum tier.

Work Like Tomorrow.™