

Premier Success: Platinum



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 Platinum 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 Platinum is a personalized service, tailored for large-scale customer automation programs. We've hand-picked a broad selection of capabilities that we've seen contribute most to customer success, and have brought them together into our Platinum service.

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)
- a minimum of one annual face to face visit

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 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. We will arrange one of these per year as an on-site visit to allow us more time to connect and review our overall partnership.

What we need from you: share your objectives and strategic planning; commit to participate in EBRs; paid travel & expenses for one annual visit.

Named Technical Account Manager(s) (TAM)

Your technical leads will need access to specialist product knowledge. That's why we'll assign one TAM for each of the Kofax products you've purchased. Your TAM will mentor your team to rapidly build product expertise, offer advice on technical best practices and troubleshooting, and voice technical needs to support your automation strategy in conversations with our product teams.

What we need from you: details of your technical automation strategy and regular time with your technical lead(s).

TERMS OF ENGAGEMENT

Design Consulting and Health Checks

Your Kofax CSM has engaged an elite team of Kofax Intelligent Automation experts to spend dedicated time with you, and will work with you to deploy them on the activities that will best help your team to reach your success criteria.

These may include mentoring your solution design team or analyzing your current system landscape to recommend a target architecture, while customers with more mature Kofax solutions already in place may benefit from comprehensive infrastructure or SaaS 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 and skill gaps, in order to identify the activities that will best support your success.

Kofax 24x7 Technical Support

As part of your subscription, you'll also have access to our premium 24x7 technical support service. Enjoy peace of mind knowing that whatever the day or time, Kofax Technical Support has you covered. Your service is available both online via the Kofax Customer Portal and by phone when reporting critical cases outside business hours.

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.

Kofax Community Premium Content

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

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

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.



Summary

Kofax Customer Success Platinum provides you with the following services:

- A highly dedicated named **Customer Success Manager** who will focus on your success and our long-term partnership through a high-touch personal relationship with you and your team
- 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*
- A named **Technical Account Manager** per product
- Regular **Design Consultation** and/or **Health Checks** to help you optimize your solution
- 24 hours per day, 7 days per week online & phone **technical support**** with accelerated Support SLAs
- Access to **exclusive Platinum content** in our Kofax Customer Community including live webinars covering the **Kofax product roadmaps**
- Annual subscription to the **Kofax Learning Cloud** to help your team build the key capabilities that your solution will require

* On-site or remote depending on preference. Customer will be liable for cost of travel & expenses

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

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