



AVEVA

SERVICES PROFILE

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# Customer Success Management Packages

**Personalized, strategic guidance and success-based services**

Customer Success Management provides personalized guidance and services to help you quickly and fully apply AVEVA solutions and ensure success. Technical experts extend your capabilities through best-practice leadership and hands-on expertise, helping you achieve rapid adoption and optimized production performance.

# Building an organization and portfolio based on world-class practices

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## Customer Success Organization

At AVEVA, we have created a dedicated Customer Success Organization. We have also operationalized our business, leveraging people, processes and technology through the new organization to ensure we can help customers quickly achieve their desired business outcomes with our solutions. Our objective is to simplify our customers' journeys towards success as they define it. Success needs to be on your terms.

The Customer Success Organization exists to proactively help customers like you: reach the business goals that justified their AVEVA purchase; remove obstacles they may face in pursuit of your goals; and inspire them to innovate and derive additional value. The organization seeks to continuously improve the customer experience and be a proactive and integral part of our customers' success.

## Customer Success Managers

The Customer Success Organization is comprised of highly experienced Customer Success Managers (CSMs). They are responsible for proactively delivering – through Customer Success Management Packages – the personalized success engagements customers need and for fostering optimized technology deployments and long-term, collaborative relationships.

## Key CSM Responsibilities

- Understand and align with customer stakeholders on the business outcomes they expect from their AVEVA technology
- Develop and execute an agreed-upon success plan to ensure expected outcomes are achieved
- Perform effective customer onboarding, including a comprehensive and personalized overview of the customer's software and the entitlements and benefits of their success management package
- Provide knowledgeable guidance, insights, and training recommendations that help customers adopt their AVEVA software solutions and quickly realize value
- Take appropriate actions when obstacles to adoption are identified and provide an effective escalation path when necessary
- Execute review cadences with stakeholders, tracking progress towards achieving business outcomes, providing recommendations to improve performance, and taking appropriate actions
- Advocate for the customer within AVEVA, including Product Support, Product Management, and R&D



# Strategic resources focused on your success and time to value

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## Customer Success Management Packages

These packages are a bundle of strategic engagements and services – many available remotely – that provide personalized guidance from highly competent Customer Success Managers (CSMs) and other experienced technical resources. Each package provides a high level of engagement:

- **Advanced** – A strategic team is focused on your long-term success. Designated CSMs and technical resources extend your team’s capabilities through best-practice leadership and hands-on expertise to achieve rapid adoption and optimized production performance. CSMs at this level typically manage four to six accounts of medium to high complexity.
- **Enterprise** – A dedicated resource(s) drives coordinated success activities across geographic regions. Enterprise builds on the Advanced level with CSMs providing cohesive, global oversight to ensure best-practice standardization and optimized deployment of AVEVA technology. Enterprise-level CSMs are typically assigned to Global Accounts (or similar) and manage no more than two accounts.

Both packages deliver across three key areas: onboarding, adoption, and success.

## Onboarding

Onboarding formally introduces you and your team to your Customer Success Manager, laying the foundation for a long-term and mutually beneficial relationship. Onboarding includes a comprehensive and personalized overview of your AVEVA software and the entitlements and benefits of your specific package. It also establishes roles and responsibilities and provides guidance on how and when you can best leverage AVEVA software and services to achieve your high-level business goals.

## Adoption

Adoption focuses on accelerating your time to value and ensuring your team is effectively and efficiently using your AVEVA software. Adoption includes:

- **New Software Features and Offers Introduction** – A tailored session(s) introduces you to the latest software features and enhancements available for your licensed AVEVA products, helping you adopt new capabilities.
- **Adoption Workshop** – Benchmark your current technology and levels of feature usage and adoption/consumption, highlight best practices to fully utilize AVEVA software, and identify any usage gaps to further increase value and productivity.
- **System Health and Performance Review** – Detailed and summary information about your system’s health allows you to review and identify potential areas of concern, and plan and execute actions to prevent potential failure conditions or operational interruptions.
- **Application Design and Architecture Consulting** – A technical expert will review the business requirements, definitions, and designs for your solution and supporting infrastructure and provide recommendations to ensure the solution is designed and engineered using best practices.
- **Training Path Assessment** – An AVEVA training expert will work with you to determine the best approach to maximize the efficiency and effectiveness of your workforce.



# A collaborative partnership, working together

## Success

Success engagement activities demonstrate AVEVA's dedicated effort to be an integral part of your success by forming a collaborative partnership where we work together to help you achieve your goals and operational imperatives. Success includes:

- **Success Planning** – Your CSM will develop and recommend a path to help you achieve your strategic goals and establish priorities and evaluation criteria. This detailed plan identifies business outcomes and value drivers and is the basis for quarterly Business Reviews.
- **Business Reviews** – Track progress towards achieving your business outcomes and assess and improve your Success Plan's effectiveness. Together, the Success Plan and Business Reviews foster alignment across your team and a successful partnership with AVEVA.
- **Pre-commissioning Consulting** – Comprehensive consulting, including recommendations and best practices, helps confirm functional capabilities and identify potential issues that may impair system performance or stability, giving you confidence your system is tuned and ready for trouble-free commissioning.
- **Upgrade and/or Migration Planning** – A technical resource will assess your installed software and provide high-level coordination, a roadmap, and the sequence of events needed for a quick, efficient, compatible upgrade/migration to new releases and technology.
- **Patch and Maintenance Planning** – Efficiently upgrade your software with detailed planning documentation including a report of general maintenance items and a comprehensive Change Management Checklist.
- **Root Cause Analysis** – Get an in-depth and summary report of a problematic or critical system issue. AVEVA expert-level personnel will investigate, analyze, and summarize event timelines while providing resolution and recommendations.
- **System Performance Tools and Utilities** – We will introduce you to a variety of helpful AVEVA and third-party tools and utilities that can help you improve the performance of your system.
- **Points** – Take advantage of inclusive points to obtain additional Success Accelerators or expand the scope of what is covered in a package.





## Customer Success Accelerators

We also offer a portfolio of optional, outcome-based, “snackable” services to help you achieve your goals and objectives throughout the lifecycle stages of your AVEVA software. Whether you are engineering best practices, effectively running and maintaining your software, optimizing its performance, or driving further innovation, you will find this growing collection of pre-packaged services valuable.

Accelerators are organized by lifecycle stage:

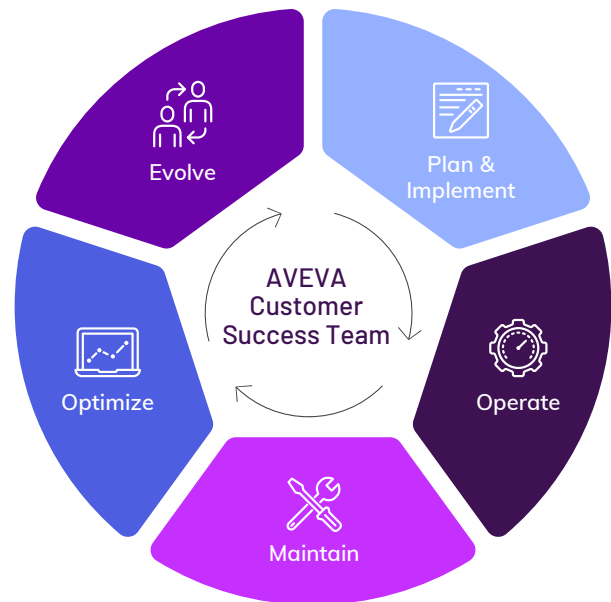
**Plan & Implement** – Engineer best practices and application architecture and improve time to value

**Operate** – Effectively run your software with expert training and drive increased engagement and adoption

**Maintain** – Efficiently maintain your software, including updates, patches, and license management

**Optimize** – Improve software performance and reliability and drive changes to address new market requirements

**Evolve** – Drive innovation through the deployment of major version upgrades, adopt new technology, and future-proof your application



To learn more, please contact your AVEVA representative or visit us online at [aveva.com](https://aveva.com)

**AVEVA**

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