Planview Success Accelerator

A Customer Success Manager can help you plan, prioritize and optimize your ongoing Planview journey, as well as monitor your organization's product adoption and overall Planview experience. The Professional Services hours can help you with further configurations as well as product assistance.

Tier	Included
Tier 1	Customer Success Manager (CSM): 10 hours/quarter Professional Services Remote Advisory Services (PS RAS): 5 hours/quarter
Tier 2	Customer Success Manager (CSM): 20 hours/quarter Professional Services Remote Advisory Services (PS RAS): 10 hours/quarter
Tier 3	Customer Success Manager (CSM): 40 hours/quarter Professional Services Remote Advisory Services (PS RAS): 20 hours/quarter

CSM Activities may include:

- Business outcome identification and monitoring
- Journey/adoption workshops
- Usage monitoring
- Customer Care case review
- Monthly Business Reviews
- Product advice (Features, Functions, Processes, Configuration)
- Reporting/Dashboard advice
- Annual health check

PS RAS Activities may include:

- Product configurations, workflows

Program Guidelines:

- Price listed is for a 12-month term
- Unused hours expire each quarter
- Can draw down hours early from up to 1 future quarter

Customer Success Accelerator Activities

Business Outcome Identification And Monitoring

Prioritize and plan where to get value next from your Planview solution. Build a plan documenting the value and services to achieve the desired outcomes

Journey/Adoption Workshop

Workshop to help map your organization's journey as it relates to the Planview solution

Monthly Business Reviews

Cadence with your Customer Success Manager (CSM) to review journey progress, solution adoption and overall customer experience

Product Advice

Leading practice advice on Features, Functions, Processes, and Configuration for your Planview solution

Reporting/Dashboard Advice

Understand which reports and dashboards can help support your business outcomes and needs.

Usage Monitoring

Tracking the progress of your solution adoption is important to drive change and increase the value being received

Customer Care Case Review

Understanding the priority current cases and the business reasons to help the Planview Customer Care team focus on what matters most to you

Remote Advisory Hours

Specialized hours designed to help address specific customer needs, allowing you to receive quick and cost-effective enablement

Annual Health Check

Discovery and review of your usage by stakeholders and end users. Report out on the value achieved and delivered.

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