

INFO SHEET

Planview Success Accelerator

A Customer Success Manager can help you increase adoption, prioritize and plan an ongoing value-based solution journey while monitoring your overall Planview experience.

To learn more, email market@planview.com

Tier	Included
Tier 1	Customer Success Manager: 15 hours/quarter
Tier 2	Customer Success Manager: 30 hours/quarter
Tier 3	Customer Success Manager: 60 hours/quarter

CSM Activities include:

- Assigned/Named Customer Success Manager (CSM)
- Scheduled quarterly customer touchpoints
- Journey road mapping
- Adoption monitoring
- Customer Care case review

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

Quarterly Business Reviews

Cadence with your Customer Success Manager to review solution adoption and overall customer experience

Journey Road Mapping

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

Adoption Monitoring

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

Customer Care Case Review

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