**BUILD STRONGER B2B CUSTOMER RELATIONSHIPS.**

TEAM SUCCESS

REVENUE FOCUSED CUSTOMER SUCCESS SOFTWARE.

Early Access Program Requirements Overview
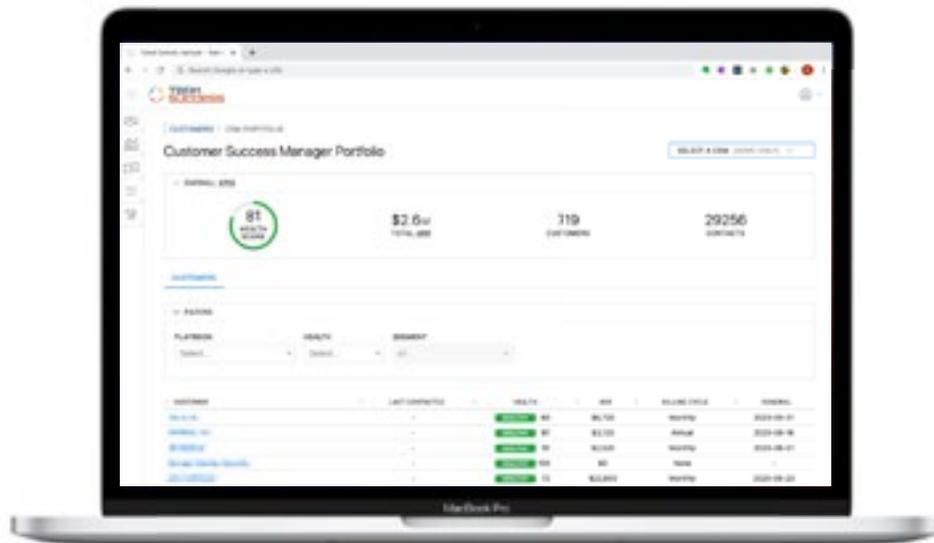
What is the TeamSuccess Early Access Program (EAP)?

As part of the TeamSuccess Early Access Program (EAP) by TeamSupport, you'll play a pivotal role in the validation of this new software solution, its technology components, and the benefits your B2B customer support team will realize. And you will have the opportunity to provide suggestions on the features of TeamSuccess, giving you an important voice in the continued development of this solution. You'll also benefit from a dedicated expert who will assist you throughout the program.

Early Access Program Benefits

- Access to TeamSuccess, the new business intelligence solution by TeamSupport
- Access to product and technical support during the EAP to assist with questions or issues
- Access to TeamSupport thought leadership and product management
- Influence on product roadmap and feature prioritization
- Free usage of new technology during the 60-day EAP term

About TeamSuccess

The cost of acquiring new customers is much greater than what it costs to retain existing ones. A 5% decrease in monthly churn can result in 50% more revenue over a five-year period. The best way to protect and expand your core business is to ensure your customers are succeeding with your product. With TeamSuccess, this has never been easier!

With increasing revenue as its primary focus, TeamSuccess boldly repositions the role of B2B customer support software in the industry. Through proactive features that improve your existing customer relationships, it is the first solution to fully realize the revenue potential of customer success. TeamSuccess allows your team to easily monitor, automate, and streamline your customer lifecycle, creating more upsell opportunities, reducing the risk of churn, and ensuring that as your customer relationships grow, your profits do, too.

- Aggregate multiple data sources into a Customer Health Profile that will provide a 360° view of customer status, satisfaction, and product usage.
- Lead customers through critical lifecycle phases. Plan stages and activities around business outcomes.
- Ensure your customers are best utilizing your capabilities through full visibility into customer success team productivity and product adoption data.
- Take proactive steps to maximize retention and grow ARR. Automatically identify customers in distress and mitigate risk of churn.

About the TeamSuccess Early Access Program (TSXEAP)

High Level Overview

- Program will run between January 11 and March 15 (60 days).
- Customer will be provisioned 5 TeamSuccess Licenses.
- TeamSuccess will be integrated with existing TeamSupport customer, contact, and ticket data.

Purpose

To ensure we bring a solution to market that meets your needs, TeamSupport is looking forward to learning the following from the program participants during the EAP:

- **Usability feedback**

  - How easy or difficult is it to create a playbook?
  - How easy or difficult is it to configure an automation?
  - How easy or difficult is it to create customer segments?
  - How easy or difficult is it to monitor the health of a customer?

- **Day-to-day usage**

  - What type of role uses TeamSuccess the most?
  - What are the most important use cases on a daily basis?
  - What do you do with the information TeamSuccess returns?
  - Does TeamSuccess provide you with actionable information?

Participation Requirements

- The terms of the existing Master Services Agreement (MSA) between TeamSupport and the Customer apply to this program. An additional EAP agreement may be required before a customer can participate in the program.

Technical Requirements

- Existing TeamSupport Enterprise customer with a signed master services agreement (MSA) and NDA in place

Evaluation Process

During the term of the EAP you will be willing to

- Evaluate TeamSuccess as a Customer Success Manager (CSM).
- Monitor customer health of select TeamSupport customers.
- Create customer segments to monitor health.
- Create and manage product subscriptions and renewals.
- Create a variety of playbooks and workflows to test our automation features.

Time and Resource Commitment

- Willing to meet with TeamSupport Product Team over video conference for at least 1 hour on a weekly basis to discuss progress against the evaluation timeline, any issues found during the evaluation, as well as any product feedback.
- Willing to participate in two 1.5 hour training sessions.

Case Study Participation

EAP participants who have successful deployments and evaluations of TeamSuccess are invited to also participate in a case study. This will be helpful in showing how the technology can be utilized by future TeamSuccess users.

Deployment Strategy

TeamSupport and TSXEAP participants will follow these steps below during the Early Access Program. Of course, this process may be adapted based on your organization.

Step 1: EAP Participant – *Provision Users*

- Identify up to 5 TeamSuccess Users (1 Admin, 1 CSM Manager, 3 CSMs)
- TeamSupport to provision users in TeamSuccess.

Step 2: TeamSupport and EAP Participants – *Conduct in-depth training*

- All participants to attend two 1.5-hour training sessions

Step 3: EAP Participants - *Monitor customer health*

- Utilize TeamSuccess to monitor 5–10 customers
- Create a playbook and simple automations

Desired Outcome

- You are comfortable with the TeamSuccess user experience.
- You are comfortable in utilizing TeamSuccess to track and monitor customer health.

Technical Support During Early Access Program

During the Early Access Program, TeamSupport will be available by email Monday–Friday, 9am–5pm CST, to support issues or questions directly related to TeamSuccess.

Understanding this program is not intended for production environments, our response time to all inquiries will be within four (4) business hours. No weekend or after hours support will be made available during the Early Access Program.

Support can be reached at: support@TeamSuccess.com.

Our Commitment to You

- Direct involvement of product teams
- Direct customer feedback
- Help shape product direction

Our Ask of You

If you are interested in using TeamSuccess after the EAP term has ended and purchasing the Generally Available (GA) version, please reach out to your TeamSupport Account Executive.
LifecycleEfficiencyCSMPerformanceCustomerInsightsRevenueGrowthMaintain and strengthen your current relationships. Track subscription revenue trends to identify upsell opportunities. Set alerts for renewals and take proactive steps to maximize retention and grow ARR. Automatically identify

Important Links:

TeamSuccess Early Access Microsite

Interested in becoming a TeamSupport Champion?

We would love to hear about your experience.

Contact:
Mhendrick@TeamSupport.com
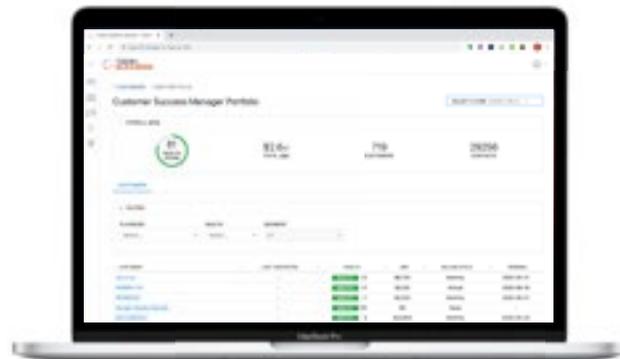
FAQs
Answers to your questions and concerns

What data integrations are available in the EAP?

Only TeamSupport customer, contact, and ticket data is supported in the EAP. In the full release, we will have the ability to import NPS, CSAT, invoice, and subscription data via CSV.

What health metrics can I track in the EAP?

Total number of submitted tickets, number of critical unresolved tickets, CDI, NPS, CSAT, churn candidate, and days since last touchpoint.

What customer segments can I create in EAP?

Playbook, number of licenses, plan, billing cycle, churn candidate, NPS, CSAT, ARR, MRR, and Health Score.

Can a customer be assigned to more than one CSM? Yes.

Can I bring only certain customers into TeamSuccess from TeamSupport?

Yes. As part of the integration settings you can choose multiple fields to filter by, including customer custom fields. For example, if you had a custom field that denotes if a customer record is a trial customer, and you only want to import non-trial accounts, you can filter based on that custom field to exclude trial accounts.

What is the difference between the CSM and CSM Manager role?

A CSM Manager will be able to see a CSM dropdown menu which will allow the manager to view the CSM's customer portfolio and revenue dashboards. A CSM will only see their assigned customers in the portfolio and revenue dashboards; they can search for other customer records belonging to another CSM and view them.

How do you manage product subscriptions and renewals?

In the EAP, we allow for manual subscription management where the CSMs must specify if the customer's subscription will be renewed or churned. We also allow for automatic subscription renewal where the customer's subscription will be renewed automatically on their renewal date.

What automations are available as part of the EAP?

Currently, only adding a customer to the playbook is available in our workflow automations. We will be adding the ability to create a task, assign tasks to a CSM, send an email, or create an alert for general availability release.

TEAM SUCCESS
REVENUE FOCUSED CUSTOMER SUCCESS SOFTWARE.

Customer success isn't just good for customers, it's good for your bottom line.

With increasing revenue as its primary focus, TeamSuccess boldly repositions the role of B2B customer support software in the industry. Through proactive features that improve your existing customer relationships, it's the first solution to fully realize the revenue potential of customer success. TeamSuccess allows your team to easily monitor, automate, and streamline your customer lifecycle, creating more upsell opportunities, reducing the risk of churn, and ensuring that as your customer relationships grow, your profits do too.

REVENUE GROWTH

Maintain and strengthen your current relationships.
Track subscription revenue trends to identify upsell opportunities. Set alerts for renewals and take proactive steps to maximize retention and grow ARR. Automatically identify customers in distress and mitigate risk of churn.

CUSTOMER INSIGHTS

Unify your customer data to identify risks and opportunities.
Aggregate multiple data sources into a Customer Health Profile that will provide a 360° view of customer status, satisfaction, and product usage.

LIFECYCLE EFFICIENCY

Set goals and achieve them.
Lead customers through critical lifecycle phases. Plan stages and activities around business outcomes. Automation of repeatable activities and alerts let your team do more with less, allowing managers to handle more accounts without compromising personal service.

CSM PERFORMANCE

Empower your team and support your customers.
A centralized interface for reporting and communication will allow your customer success managers to stay on top of their entire portfolio. Ensure your customers are best utilizing your capabilities through full visibility into customer success team productivity and product adoption data.

DATA-DRIVEN DECISIONS

All the info you need to make the right call.
Track your metrics for success through the utilization of customer KPI dashboards and detailed reporting features.

Get proactive alerts about churn, upcoming renewals, or expansion opportunities.

Create and track success journey milestones (onboarding, adoption, success planning).

Monitor customer health and adjust delivery practices to maximize impact of success activities and strengthen relationships.

Drive strategic initiatives to maximize product adoption and advocacy.
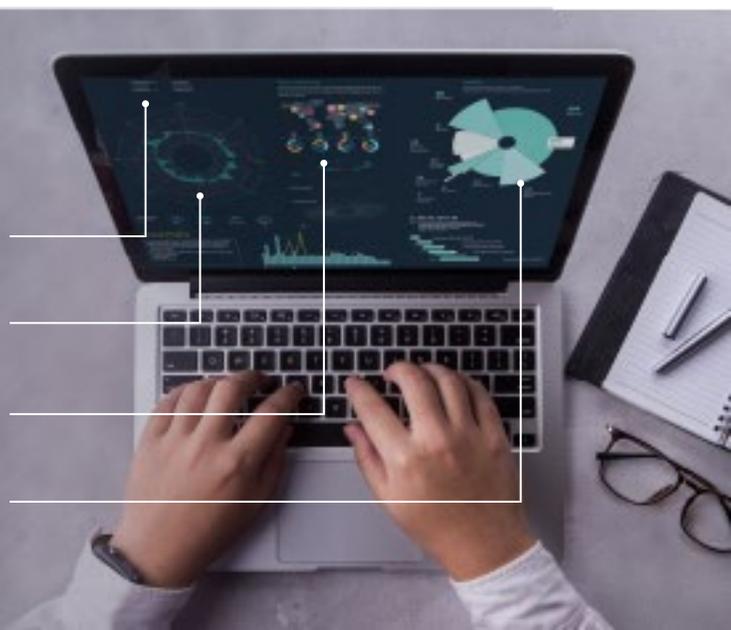
Customer Success Redefined.

The cost of acquiring new customers is much greater than what it costs to retain existing ones. A 5% decrease in monthly churn can result in 50% more revenue over a five year period. The best way to protect and expand your core business is to ensure your customers are succeeding with your product. With TeamSuccess, this has never been easier. Your customer success managers can actively monitor your customers and make sure they are continuously receiving their expected value.

- Recurring Revenue
- Renewal
- Upsell
- Cross-sell
- Churn
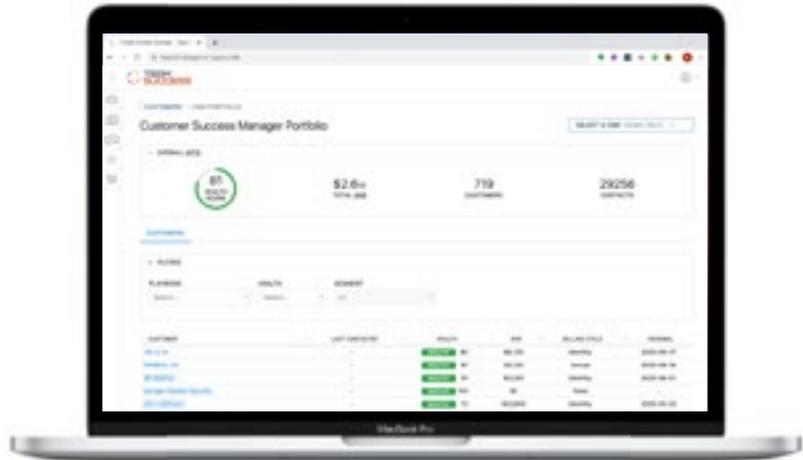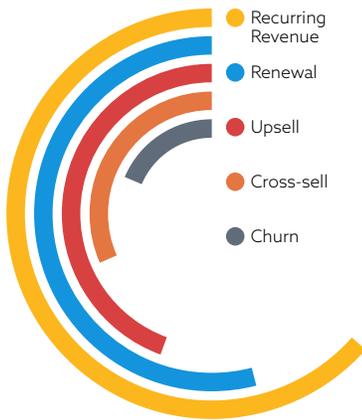
> *TeamSuccess has changed how we approach our customer relationships. We're now making revenue through channels we never considered as bottom line contributors.*

Ready to take your customer relationships to the next level?
Start with TeamSuccess today by calling 800.596.2820 ext. 1 or email Sales@TeamSuccess.com