

# Verato Customer Success Plan: Overview

## Executive summary

At Verato, we are obsessed with the success of each of our customers. Yet we understand that every customer has their own unique needs, their own complex technology ecosystems, and their own varied levels of understanding of identity challenges and solutions.

That's why we designed the Verato Customer Success Plan to deliver hands-on, white-glove support from our team of identity experts to every customer throughout their entire journey with Verato. From initial onboarding and implementation, to ongoing training, to supporting you through new projects and data integrations, our team will be there to ensure your success every step of the way.

Our passion for delivering exceptional customer experiences is evidenced by our Net Promoter Score (NPS), which ranks in the 99th percentile for the industry, as well as by having 99% customer retention. In fact, being customer obsessed is so foundational to who we are that it is one of our three core corporate values.

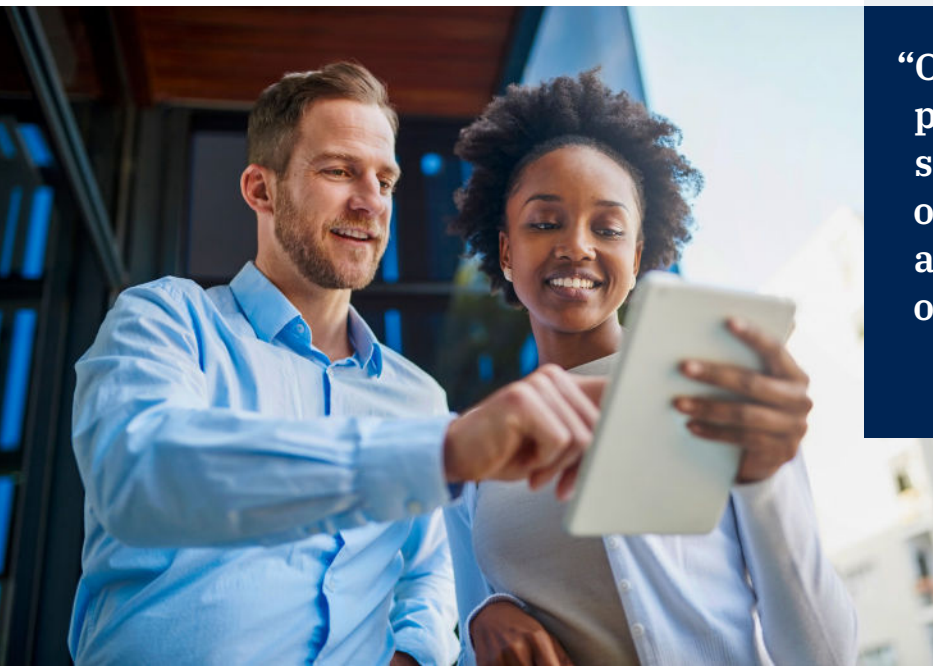
## Benefits of the Verato Customer Success Plan include:

- A dedicated Technical Customer Success Manager (CSM)
- Access to trusted advisors that are identity experts with 160+ years of domain expertise
- Personalized enablement and training on Verato solutions
- Accelerated time-to-value to deliver business KPIs
- Tailored solutions for your business challenges
- 24/7 technical support and proactive monitoring
- Incremental bulk data processing, including data profiling
- Proactive actionable insights via annual health checks
- Access to indisputable Value Delivery Dashboard
- New source and use case projects as you grow

**“Our customers count on our partnership and dedication to their success. Our team of customer obsessed identity experts are always on and always ready to offer advice/support/guidance.”**

Clay Ritchey, Chief Executive Officer, Verato

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## Verato Customer Success Plan

The Verato Customer Success Plan begins on day one and continues throughout your entire customer journey. It starts with onboarding and implementation – ensuring you get connected to Verato’s secure cloud solutions, integrate them into your ecosystem, and go live in time for any internal deadlines. It continues with ongoing training, bulk loads, and technical support to ensure optimized use of Verato. And it includes supporting you through new projects, use cases, and data integrations for the lifetime of your customer experience.

Throughout this journey, your dedicated Technical Customer Success Manager will be your key point of contact – guiding and supporting you, offering best practices, and proactively pulling in additional Verato experts as required.

### Onboarding

Solution deployment starts with the right plan and the right connecting technologies for interoperability. Verato offers guidance and best practices, builds customer-specific solution configurations and security settings, and troubleshoots connectivity and data exchange with your interoperability-enabled operating systems, integration engines, and custom code.

Onboarding does not just refer to initial deployment – we will support you and the growth needs of your business at any point in your customer journey as you modify and add integration points.



## Implementation

Implementations with Verato are designed to accelerate the use of your Verato solutions to capture value as early as possible. Value-driven expertise from the Verato team will help you craft an implementation roadmap that maps to planned value propositions.

We will also help build a custom, use-case-specific project plan tailored to your business needs – with tasks, a timeline, and specific goals including go-live and wrap-up. This plan will account for your project requirements, constraints, and resource availability. If needed, your Verato Customer Success team can recommend staff augmentation services and partners to leverage Verato trained specialists to support the project plan.

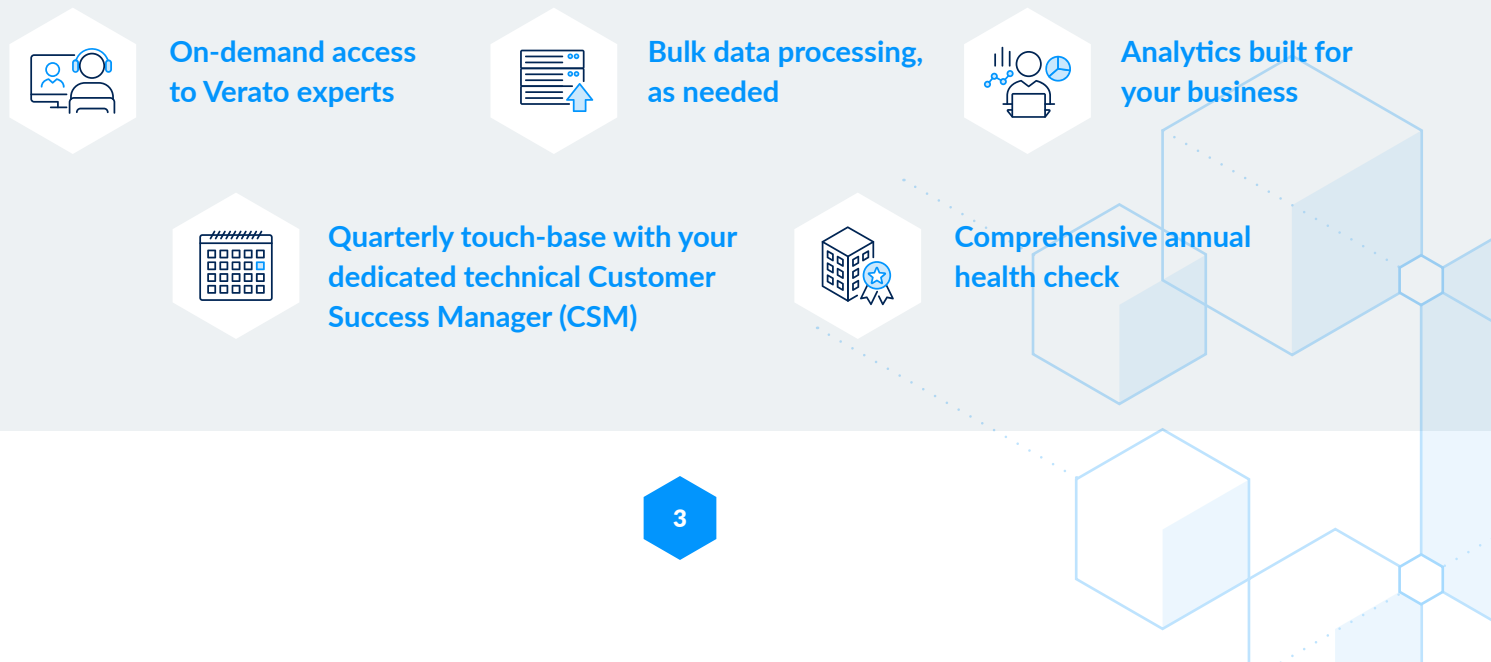
Throughout implementation, Verato will offer time-tested best practices as well as available accelerators to support your step-by-step execution of the Verato solution rollout.

As with onboarding, implementation does not just refer to the initial deployment – we will support you whether you're implementing the solution the first time, expanding usage by adding sources to an existing implementation, planning to make configuration changes to meet a growing business need, or expanding usage for newer use cases.

## Ongoing optimization

As you continue to use your Verato solutions, we not only offer 24x7x365 technical support, we more importantly conduct proactive, around-the-clock operations monitoring and maintenance to minimize disruptions and impact on your business.

Additionally, you will get (some constraints may apply):



## Training

During implementation and beyond, we offer training on the Verato solutions you use. Our training and enablement methodology is a “learn from the experts” approach – our identity experts deliver the training on topics like Verato Referential Matching®, our APIs, and our user interface. These expert-led courses are not limited to just the explanation of Verato product functionality, but also include interactive design and workflow discussions.

We will even provide targeted, outcome-based sessions on an ongoing basis as needed to upskill newer resources on your team or refresh existing resources.

## Ongoing evaluation and new projects

We will work with you as you grow, scale, and expand use cases – and we will ensure our solutions are optimal for your future needs. Our team of experts is available to conduct exploration of your identity-related use cases through discovery sessions and maturity assessments of your business needs. We will engage with you to identify and understand any newly identified use cases, business challenges, and business ideas, and recommend how Verato can best help address those needs. We will work with you to expand the Verato solution into detailed solution architectures to support your business growth. And we will conduct annual evaluation events to uncover additional business value through the new ideas and use cases.



**Verato**, the identity experts for better data management, drives business performance by solving the problem that drives everything else--knowing who is who. Only the Verato cloud-native, next-generation MDM platform for financial services enables interoperability across an increasingly complex digital ecosystem to power 360-degree views of your customers, members, account holders, consumers, and beneficiaries. With an enterprise-wide single source of truth for identity and unmatched accuracy, ease, and time to value, Verato ensures that you get identity right from the start.

For more information, visit [verato.com](https://verato.com).

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