AutoRek

Customer Success Brochure

Welcome to AutoRek – we're delighted to have you on board as a new customer!

Customer success at AutoRek

You've selected your AutoRek solution and you've been introduced to your Customer Success Manager (CSM). What can you expect next?

Our customer success engagement model ensures you have a trusted partner with you at every stage of your journey. We'll support you and help manage your expectations.

We believe our customers should be as delighted with our CSMs – and the service we provide – as they are with our solution.

Sarah Hall
VP, Customer Success

Our customer success engagement model

Getting started – onboarding and implementation

The first thing our team will do is set up an initial onboarding call introducing you and your team to your CSM. On this call, we'll set out the journey you'll go through – from implementing your solution to rollout, adoption and value realisation.

Your project team will then set up a cadence of engagement for your implementation, aligned to best-practice project governance. Your CSM will accompany you through key milestone gates and steerco meetings to ensure we have full visibility and a complete understanding of your needs and goals.

Post-live – rollout, adoption and value realisation

Your CSM will be your key point of contact after you go live with your AutoRek solution. We'll keep in close contact with you and your project team in the months after implementation to ensure a smooth handover and transition to live.

Your CSM will work with you to ensure the solution performs as expected, and to establish how you can maximise the value of the AutoRek solution in your organisation.

We'll connect the right people in our organisation with the people in yours, to work together and get the most out of your solution and performance. Ongoing executive engagement will also focus on aligning our roadmap to your strategic imperatives.

Your AutoRek customer success journey

We put our customers at the heart of our engagement lifecycle and your CSM will support you every step of the way

Customer success journey overview

Pre-sales to signature → Introduction → Implementation → Go-live → Success

←— **Customer success change management** —→

Contract signature	Introduction	Project	Go-live	Success
Led by our Account team to find the best-fit solution to satisfy your busiess requirements.	An introduction to your dedicated team of specialists with the single goal of ensuring your successful use and second-to-none experience of AutoRek.	Our dedicated team of solutions consultants will implement your AutoRek solution, focusing on bringing you a quick return on investment.	It's time to start reaping the benefits of robust data managment, automation and efficiency.	**ENGAGE** fully with the client. **ENHANCE** the AutoRek experience **EMPOWER** you to do more within AutoRek.
Account team and Customer Success	Customer Success and Implementation team	Implementation team and Customer Success	Implementation team, Application Support and Customer Success	Your dedicated Customer Success Manager

←— **Your success journey** —→

Who you'll be working with at AutoRek

01 Customer Success team

Your CSM will be your own dedicated resource, advocate and representative within AutoRek.

We understand that no two businesses' needs and challenges are the same and understanding yours is essential to ensuring you succeed. No matter the objective, our team will build strong, long-lasting relationships with you and the people in your team – you'll always know exactly who to turn to for support.

We believe success reaches far beyond implementation. So, we are with you every step of the way to provide support and value-driven engagement.

We'll also offer additional services including training, networking events, and technical CSM support. And we'll respond quickly to any problems or issues you may have and aim for a rapid resolution.

02 Account team

Our account executives will work with you once you are live. Working in partnership with your CSM, they'll ensure your ongoing needs for upgrades, growth and user-base expansion are commercially supported.

03 Implementation team

A highly trained team of solutions consultants and project managers, focused on implementing your AutoRek solution, will deliver seamless implementation. They'll ensure you're up and running and getting the most value from your solution as fast as possible.

04 Support team

Our highly-skilled Support team are committed to helping you come to speedy issue resolutions and successful releases. We strive to deliver the best experience of AutoRek from end-to-end, especially when you need support. We understand the critical nature our application plays in your organisation and how important it is for you to have direct access to a knowledgeable team.

As well as being technical experts in the AutoRek platform, our team takes the time to understand the specifics of your solution before the initial go-live to minimise any challenges you may face.

Our dedicated team are on hand to provide:

- Solutions to issues
- Health checks on your environment
- Cloud operations management
- AutoRek support
- Disaster recovery tests
- Releasing upgrades
- An understanding of your unique solution
- Knowledge-based articles for your solution

Roles & responsiblities

	Team members	Key responsibilities	When will they contact you?	Who will they contact?	How to contact them?	What does this team do?	How will this team engage with you?
Customer success team	Customer success managers	• Your single point of contact across full customer lifecycle and first point of escalation • Manages your relationship • Responsible for ensuring you have an excellent customer experience with AutoRek	You will be appointed your own dedicated Customer Success Manager (CSM) who is ultimately responsible for ensuring the best customer experience possible. Your CSM will be present throughout all stages of your journey and will lead introductions, and define your engagement model.	The team will be in regular contact with your executive sponsors, business analysts and project managers to support you through the delivery of your solution.	Your CSM will initially reach out via email in order to set up the introductory video calls. From there your CSM will be in regular contact via email, video call and face-to-face meetings.	• Trusted advisor – our CSMs have the sole focus of advising you on how best to reap the benefits of AutoRek • Voice of the customer – we will act as your dedicated representative within the company • Satisfy your success criteria – we'll use our key metrics to ensure that your success criteria is satisfied, even if this changes throughout your engagement	Your CSM will be present throughout all phases of your AutoRek lifecycle.
Account team	Presales	• Product demonstration and proof of concepts • Our Presales team will also engage with you should you wish to expand your use of AutoRek	The AutoRek Account team will engage with you initially to help you decide which products and services are the best fit to satisfy your reconciliation needs.	We will be in regular contact with the executive business sponsors to ensure that we can meet your requirements.	The Account team will be in regular contact by video call, phone, email and face-to-face meetings.	• Work with you to define the best solution for your needs, as well as the associated licensing required for that package • Provide demonstrations • The team will also manage all commercial negotiations of our product offering • The Account team will also be present throughout your customer journey to engage as and when needed with regards to new products or additional licenses	The Account team can be contacted at any time for discussions related to licensing and commercial matters.
	Sales	• Identifying the best solution for your business needs • Contractual negotiations					
	Account managers	• Commercial discussions past the initial point of sale • Licensing queries • Ultimately charged with ensuring you realise the return of investment and helping you to identify opportunities to drive value across your business					

Roles & responsiblities

	Team members	Key responsibilities	When will they contact you?	Who will they contact?	How to contact them?	What does this team do?	How will this team engage with you?
Implementation team	Project managers	• Project governance • Provides governance around the project timelines and budget • Facilitates the change management process	Our Professional Services team will be in regular contact with you throughout the project lifecycle, from project kick-off all the way to go-live.	The team will be in regular contact with your executive sponsors, business analysts and project managers to support you through the delivery of your solution.	You will be introduced to your Implementation team during the introduction phase of your journey. You can contact your managing consultant throughout the project during agreed project update and progress meetings.	The Professional Services team will build out your solution as agreed and documented in your statement of work.	Your internal project team will engage directly with our Professional Services team in order to support a successful implementation.
	Managing consultants	• Oversight of your implementation • Scoping and design of your solution					
	Solutions consultants	• Will carry out configuration work to the agreed scope • Provide test support and answer general queries related to your implementation					
	Business consultants	• Will work with the Implementation team to ensure that your regulatory needs are met using our product					
Application Support team	Application support engineers	• Responsible for ensuring the resolution of any support issues raised • Manage the release process and chair our internal change advisory board	The Application Support team will contact you regarding support tickets raised via the User Portal.	The team will contact the individual person who raised the ticket in question.	Support tickets can be raised via our User Portal. The team can also be contacted via phone.	This team actively works on any productions issues you may face.	Our Application Support team will actively engage with you to triage and resolve tickets opened through our User Portal.

AutoRek training sessions

We want to ensure that you get as much out of the product as you can. AutoRek provides a range of training sessions – virtual, in-person and recorded. We offer both off-the-shelf training and training that's been tailor-made for each client and user. This ensures you have the knowledge of how to use the tool to maximise effectiveness.

If you think you and your team need training in a particular area, please speak to your CSM to establish which option suits your needs – and we'll take care of the rest.

AutoRek online events

Virtual Classrooms
We also offer the AutoRek Virtual Classroom, a series of online events that train clients on specific product features and provide tips on how to get the most from the solution.

User Groups
We actively encourage collaboration between all our customers to share ideas, best practices, and give insight into use cases. To facilitate this, the AutoRek User Group is one of the biggest dates in our calendar. At these in-person User Groups, we update you on our roadmap and latest features. You also get a chance to chat with the AutoRek team and collaborate on new features.

Product release webinars
Our recently launched product release webinars showcase the latest release of the AutoRek product. The open forum also gives you an opportunity to speak with our Product team, share feedback with them and ask questions.

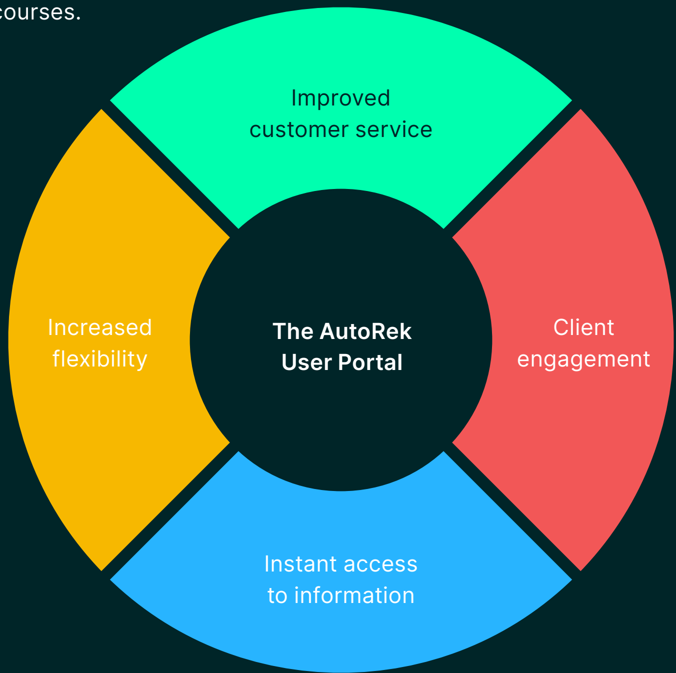
If you or your team would like to attend any of our events or require training, please speak to your CSM to establish which option suits. We will take care of the rest.

customersuccess@autorek.com

The AutoRek User Portal – Halo

The AutoRek User Portal is a secure portal, which users can access anytime, anywhere. It provides users with real-time updates on the state of their current support cases and includes a Knowledge Base for FAQs, AutoRek resources, and training courses.

The key benefits of the User Portal include:



AutoRek User Portal - Resource Library

This is a library of useful resources available to all our customers. It helps you build out your knowledge of the AutoRek solution, learn self-serve troubleshooting ideas, and discover tips and tricks on how to get the most out of your solution.

Our Knowledge Base is updated regularly with:

- Articles
- Product demos
- Feature showcases
- Recordings of training and Virtual Classroom sessions
- Information from our User Groups

Anyone with a valid AutoRek Support Portal login can access the Knowledge Base using the steps below:

01
Go to **https://support.autorek.com/portal/home**

02
Log in using valid credentials. If you do not have User Portal credentials, you can request access by contacting your CSM.

03
Click on the Knowledge Base tile to launch the incident form.

04
Use Keywords in the search bar to find resources related to your query.

Support tickets can be raised, tracked and managed through the User Portal.

AutoRek's Knowledge Base on Halo helps our customers build out their knowledge of the AutoRek solution by learning self-serve troubleshooting ideas and discovering tips and tricks.

How to raise a support ticket on the AutoRek User Portal

Anyone with a valid User Portal login can raise an incident using the steps below:

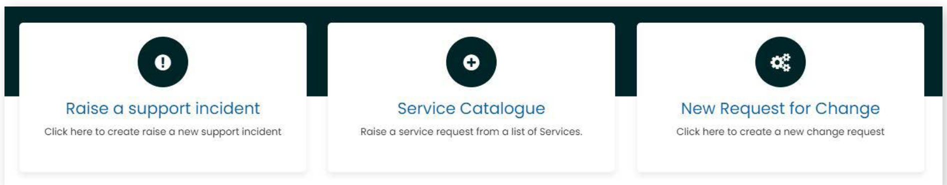
Go to **https://support.autorek.com/portal/home**

01

Log in using valid credentials. If you do not have User Portal credentials, you can request access by contacting your CSM.

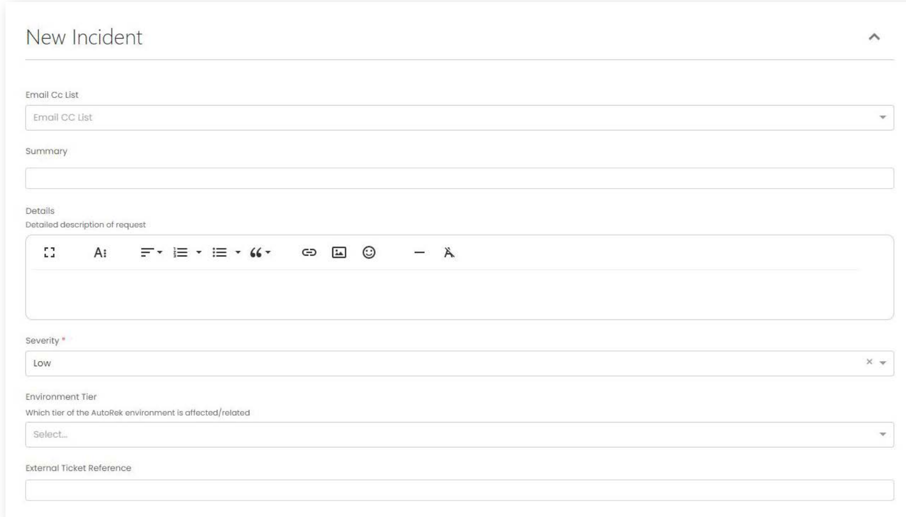
02

Click on the **Raise a support incident** tile to launch the incident form.



03

Complete the incident form by filling in the following details:



a. Summary – A concise title for the incident that clearly describes what the issue is.

b. Details – A clear description of the issue, preferably with screenshots included, which details the steps to reproduce the issue, the expected outcome and the actual outcome.

c. Severity – A mandatory field which allows you to categorise how severe the incident is.

d. Environment Tier – This allows you to label whether the incident affects e.g. product, UAT, etc.

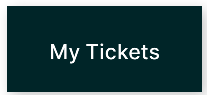
e. External Ticket Reference – This allows you to reference another ticket that you may have raised previously.

f. Assets – This gives you the opportunity to link assets. If your environment is hosted with AutoRek, this would be your application or database servers.

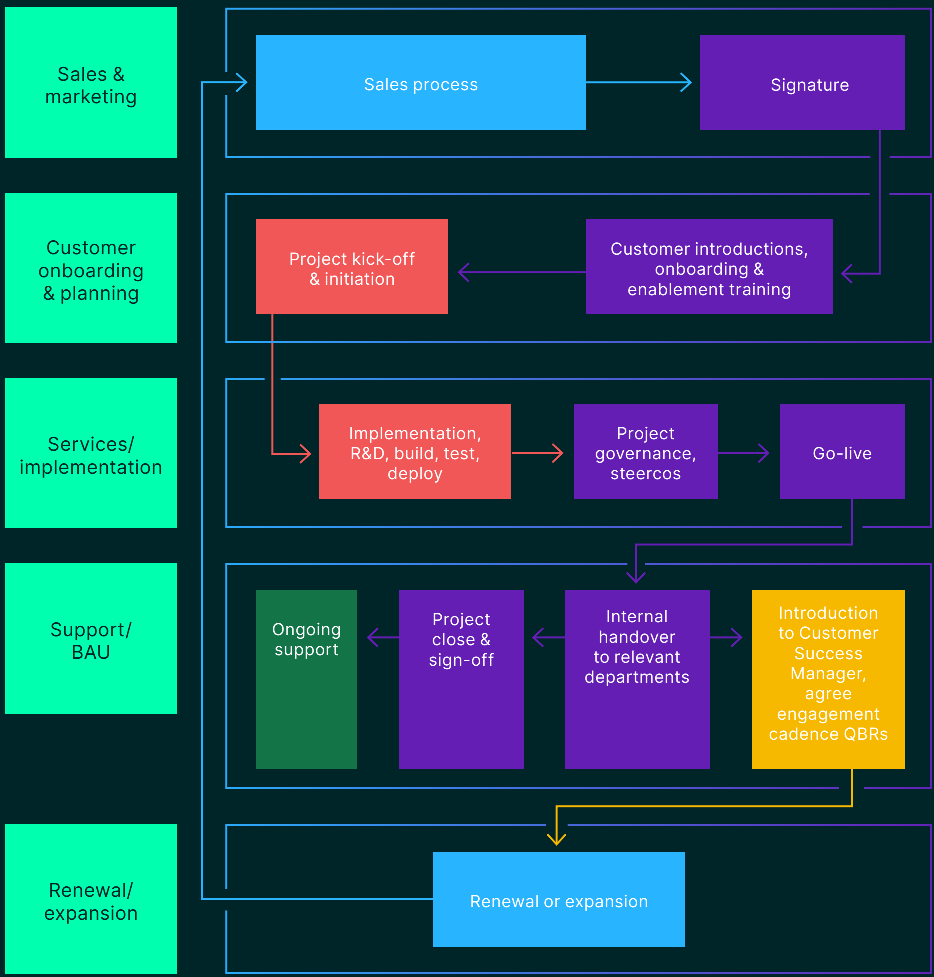
g. Attachments – This allows you to attach any reference material (e.g. event logs).

04

Manage your tickets and stay updated. See the latest updates and status of your tickets by selecting My Tickets from anywhere within the User Portal.



The customer’s journey



Get in touch

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Discover more at autorek.com