



Engagement Process

Internal Kickoff

Who: All Individuals Involved with the Sale

Items to Address:

- ◆ What potential obstacles are there?
- ◆ What are the expectations?

External Kickoff

Who: All individuals involved in the sale plus all relevant parties on the partner and customer side

Items to Address:

- ◆ Timeframes
- ◆ SLAs
- ◆ Expectations
- ◆ Assignment of Executive Sponsors and Main POC
- ◆ Establishment of clear Chain of Custody (Who owns information and communication?)

Go Live

- ◆ How do you receive and request service from Thrive?

Roles

Account Manager

- ◆ Main POC
- ◆ Establish and maintain good working relationships with client
- ◆ Serve as communication liaison
- ◆ Identify and process upsell opportunities within the account
- ◆ In some cases the Account Manager will be the Client Business Executive
- ◆ Escalations should go through Service Portal and NOT Account Manager

Customer Success Manager

- ◆ Monitors CSAT Surveys and follows up with client accordingly
- ◆ Trains client on how to best leverage Thrive resources
- ◆ In charge of opening Quality Improvement Plans (QIP) when identifying systemic issues within an account
 - In navigating a QIP, CSM explains issue to team, owns all communication and acts as customer advocate within Thrive
 - Once a resolution of QIP is achieved, CSM communicates resolution to team

vCIO

- ◆ Provides client with high level advisory service
- ◆ Works with client on budgeting at C- level
- ◆ In charge of working with client to build a technology roadmap
- ◆ Provides a technology gap analysis