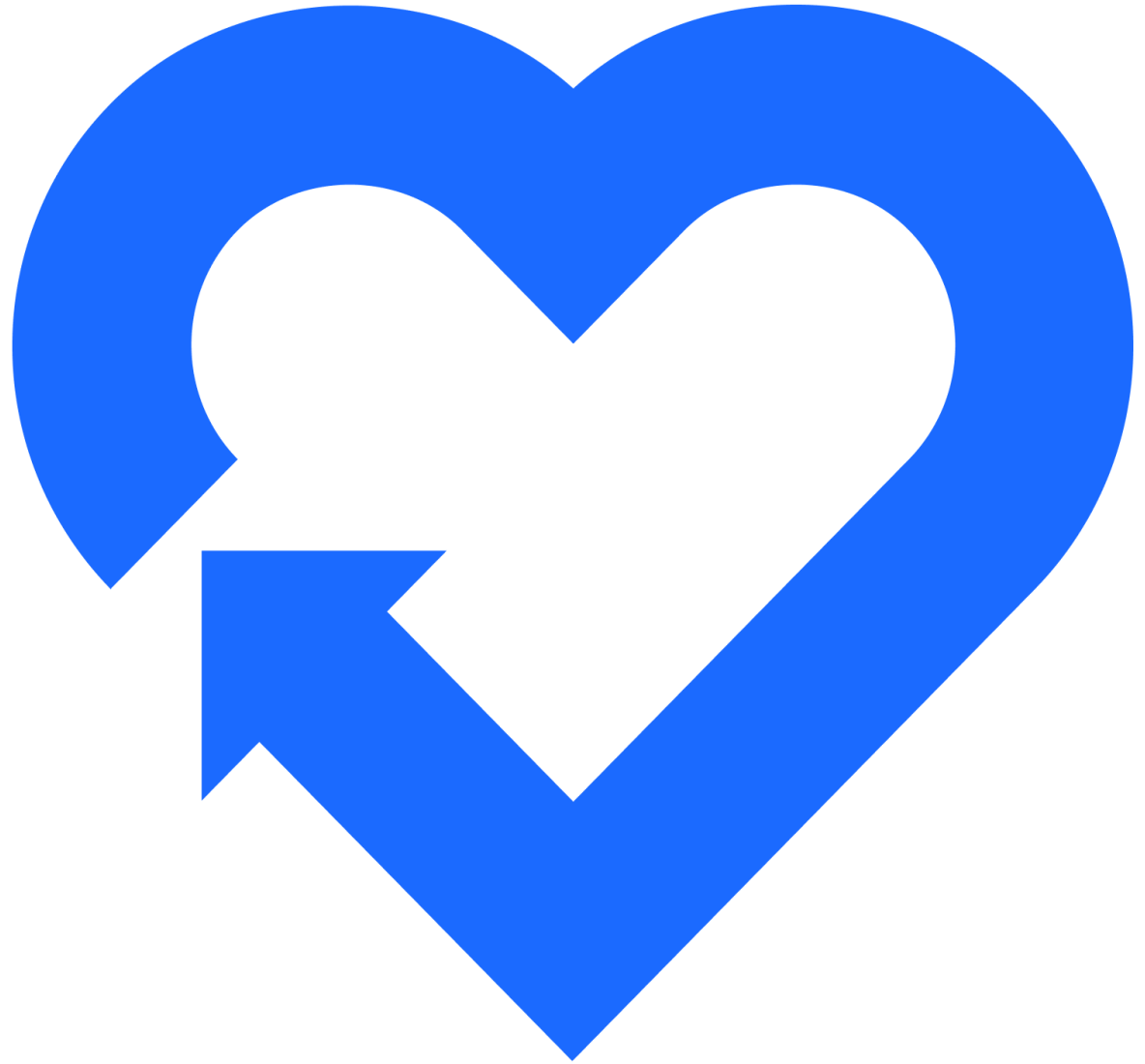# Customer Success Plan

Overview

Section 1 – Business Objectives

- Objective 1
- Objective 2
- Objective 3

Section 2 – Use Cases

- Use case 1
- Use case 2
- Use case 3

Section 3 – Stakeholders

Keep Satisfied	Manage Closely
• Name 1 • Name 2 • Name 3 • Name 4	• Name 1 • Name 2 • Name 3 • Name 4
Monitor	**Keep Informed**
• Name 1 • Name 2 • Name 3 • Name 4	• Name 1 • Name 2 • Name 3 • Name 4

Current State

Section 4 – Challenges

- Challenge 1
- Challenge 2
- Challenge 3

Section 5 – Priorities

- Priority 1
- Priority 2
- Priority 3

Future State

Section 6 – Vision Statement

Vision statement goes here

Section 7 – Success Tracking

- Success Measurement 1
- Success Measurement 2
- Success Measurement 3

Success Tracker

Success Initiatives	Owner	Target	Accomplishments	Next Priorities	Status
[Initiative] description	name	date			**Risks/ Blockers:** • N/A
	name	date			**Risks/ Blockers:** • N/A
	name	date			**Risks/ Blockers:** • N/A
	name	**date**			**Risks/ Blockers:** • N/A

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Stakeholder Engagement Matrix

CSM Customer Success Manager			AE Account Executive	
OM Onboarding Manager			SC Solutions Consultant	
OTL Onboarding Tech Lead			PS PS Project Manager	
TSM Technical Success Manager			CM Customer Manager	

Joint Success Team

Who are the key stakeholders?

Name	Job Title	Contact information	Stakeholder Role	Champion?
…	VP, IT	…	Executive Sponsor	✓
…	Business owner	…	TBD	
…	…	…	TBD	✓
…	…	…	TBD	
…	…	…	Internal champion…	
…	…	…	…	
…	…	…		

Key OpenText contacts

[Name]   **Executive Sponsor**

Name	Role	Email
[Name]	CSM	[email]
[Name]	TSM	[email]
[Name]	AE	[email]
[Name]	SC	[email]
[Name]	PS	[email]
[Name]	OM	[email]
[Name]	OTL	[email]

1. How does this stakeholder relate to other stakeholders and to OpenText? Do they influence someone? Report to someone? Why are they a key stakeholder?

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VALUE
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