

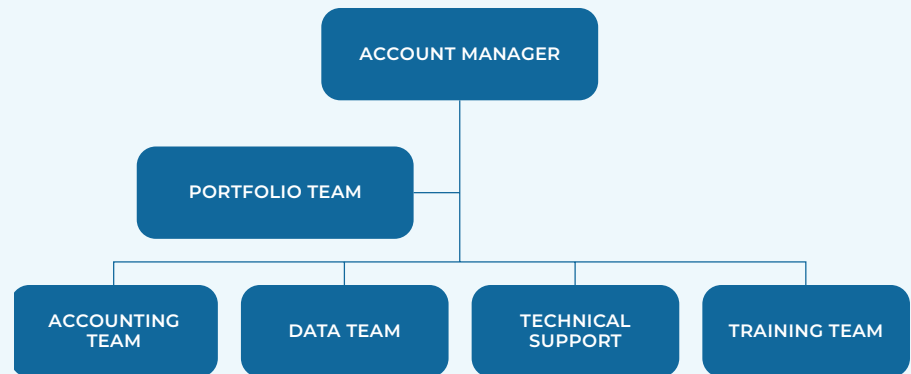
VANTACA

# Customer Success

Our Customer Success team is here to help you succeed! Support post go live is provided in two phases, Customer Support and Customer Success. Customer support is reviewing all incoming request that comes in to identify severity, impact and if this may be an item our team is already working to address. Your Customer Success team will also work with you on support tickets that are submitted to our Customer Support team based on the topic of the ticket and/or if additional training may be beneficial to resolve the matter.

## YOUR SUCCESS TEAM

You will be assigned to a portfolio with an account manager and team to help support you through any support needs as well as help you proactively think of ways to improve your team's efficiency and utilization of Vantaca.



## CUSTOMER SUCCESS PROCESS

### Quarterly Success Review (QSR)

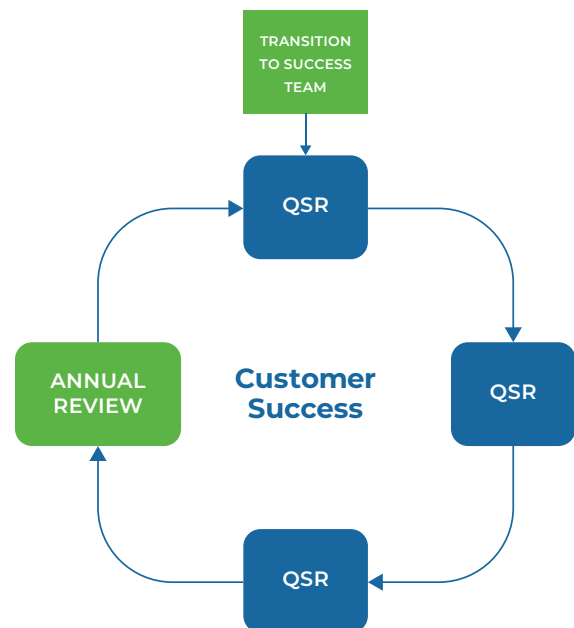
- Check in with Customer Success Team
- Data insights and analysis

### Annual Review

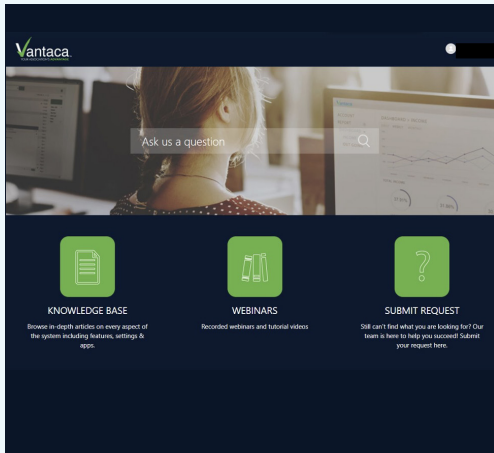
- Review of Management Company business objectives
- Strategic projects review and goal setting

### On-Going Customer Success

- Monthly project updates
- Monthly training opportunities and release webinars
- Client input for product direction
- Expert Customer Success team available for support
- Annual conference held in Wilmington, NC
- Continuous innovation within Vantaca platform
- Constantly evolving industry leading banking integration



## WE'RE HERE TO HELP YOU SUCCEED

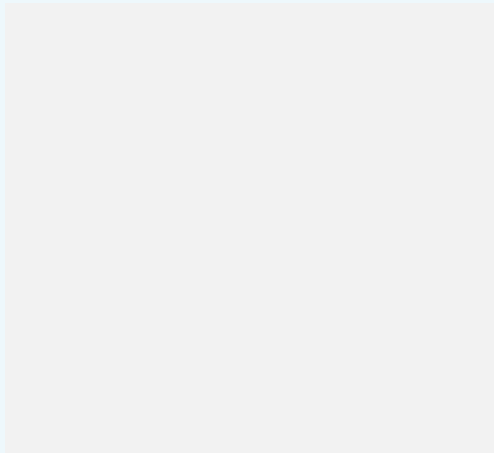


### Vantaca Help Center

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[vantaca.zendesk.com](http://vantaca.zendesk.com)

- Review Knowledge Base articles for common questions
- Watch videos and webinars
- Submit requests
- View your open requests by setting up a profile



### Building A Success Plan

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*Asana: Your Success Plan*

- Project management tool detailing
  - Road Map
  - Business Critical Items
  - Enhancement Requests/Suggestions
  - Training
  - Process Reviews
- Continually updating and improving your Vantaca experience



## HAVE ANY QUESTIONS?

Do you have any specific information, want to learn more about Vantaca's features, or just need software advice? Contact us and we'd be happy to help.