

Scope of Customer Value Services

Last Modified on 04.06.2025

Empowering Strategic Success with Userlane

What Are Customer Value Services?

Userlane’s Customer Value Services are designed to help you achieve more than just software adoption - we help you turn digital adoption into measurable outcomes. When you’re on our Premier Support Plan, you’ll be paired with a dedicated Customer Value Manager (CVM) - your strategic partner throughout the journey.

From day one to renewal and beyond, your CVM ensures your Userlane setup aligns with your business goals and evolves as your needs change.

Your Dedicated CVM: What to Expect

Your CVM is more than just a point of contact—they’re a trusted advisor who collaborates with you across teams and milestones to help you get the most out of your Userlane experience. They support you by:

- Creating structured success plans together with you
- Guiding your onboarding journey
- Leading regular check-ins and strategic business reviews
- Helping align internal teams and escalate support issues effectively

What’s Included in Customer Value Services

Here’s a breakdown of the key services your CVM will provide under the Premier plan:

Service	What It Means for You
Onboarding Planning & Governance	A clear onboarding roadmap tailored to your technical landscape, timelines, and stakeholder responsibilities. We’ll help you define what success looks like and how to get there.
Success Plan Development	A joint plan that links your business goals to concrete Userlane milestones - so we’re not just implementing software, we’re driving outcomes.
Business Reviews	Every quarter, your CVM leads a strategic review to reflect on usage data, milestones achieved, and what to improve. This is also a great time to explore new capabilities.

Adoption & Engagement Health Monitoring	We keep a pulse on how your users interact with Userlane - proactively flagging trends, challenges, or gaps in engagement before they become problems.
Technical Health Reviews	Regular deep-dives into your setup to ensure your configuration, content structure, and integrations are optimized for performance and scale.
Best Practice Consulting (DAP Advisory)	We share proven approaches to guide creation, audience segmentation, and process design. From storyboarding to targeting, your CVM helps you build smarter.
Product Roadmap Updates & Alignment	Stay ahead with insights into what's coming from Userlane and how new features can help support your initiatives.
Feature Enablement Sessions	When new features roll out, we don't just tell you - they show you. You'll get tailored walkthroughs focused on your use cases.
Support Coordination & Escalation	If you ever face roadblocks or critical issues, your CVM will work with our technical support team to ensure timely and effective resolution.
Expansion & Change Planning	Whether it's a new business unit, app rollout, or user group, we help you scale Userlane thoughtfully.

Two (2) hours of Customer Value manager services per month;

Two (2) hours of Technical Support services per month

Two (2) Executive Alignment meetings per year

How We Deliver

- Format: All services are delivered remotely via video meetings, emails, or shared planning tools.
- Languages: Available in English and German.
- Cadence: Typically, your CVM will meet with you monthly or quarterly, depending on your project phase and needs.

What's Not Included

While your CVM plays a crucial role in your success, some services fall outside their scope. These include:

- Content creation (e.g., building or maintaining guides)
- API/SSO configuration and integration
- Custom analytics or dashboards
- Project or program management
- On-site engagements (unless separately scoped)

If you need support in these areas, we offer it via Professional Services packages.
