

# SUCCESS PACKS

Delivering a Range of Services to Achieve Your Business Objectives

## Overview

As an eVestment client, your subscription includes standard support via phone and email, in-app videos/help articles, live chat, training webinars and an automated onboarding experience. In addition to our Standard Support, eVestment offers three paid Success Packs to provide a level of customization that fits the needs of your organization. Success Packs are recommended for clients that would like a more personalized and proactive service experience.

	Standard Support (Included)	Advanced	Elite	Elite+
Live Chat, Phone & Email Support	✓	✓	✓	✓
Online Training Content	✓	✓	✓	✓
Community Webinars	✓	✓	✓	✓
Client Conference Registrations*		1	2	3
Custom Training Program		✓	✓	✓
Tailored Learning Hub		✓	✓	✓
Virtual Workshops		✓	✓	✓
On-site Workshops			1	2
Report Creation & Automation			✓	✓
Support Check-Ups			Annual	Quarterly

## Advanced

With this pack, we will develop a custom training program for you. This includes a dedicated repository of your training content as well as interactive virtual workshops. This pack also comes with one pass to an eVestment conference.

## Elite

Our Elite success pack includes all the benefits of the Advanced pack, along with a highly personalized on-site workshop delivered for both users and consumers of eVestment data. We will also help lessen your workload with report creation and automation and show you how to work more efficiently with an annual Support Check-Up.

## Elite+

This success pack includes all the benefits of the Elite pack, with an additional on-site workshop, three passes to an eVestment conference and quarterly Support Check-Ups.



# SERVICES AVAILABLE THROUGH SUCCESS PACKS



## Client Conference Registrations\*

Explore disruptive challenges facing our industry. Learn from your peers about how they leverage data to improve outcomes, attend specialized workshops, and have the opportunity to influence current and future eVestment solutions. Registration fees are included for the number of attendees noted, excluding travel costs.



## Tailored Learning Hub

A dedicated repository of your training content and videos, specific to your firm's objectives. Ensure all new and existing users have access to the same training program, accelerating the value derived from eVestment solutions and data.



## Virtual Workshops

Virtual workshops are a critical component of your tailored eVestment training program, delivered by a certified eVestment training specialist. These outcome-driven and interactive sessions provide your users with the skills to perform critical tasks inside eVestment, achieving your company's objectives.



## Onsite Workshops

Onsite, hands-on training workshops are your team's opportunity to put what they have learned into practice. Attended by both users and consumers of eVestment data, these highly-interactive sessions will provide insights into your specific institutional business questions.



## Report Creation & Automation

Report creation/automation service includes up to 12 hours to configure or automate reports for your organization. This can also be applied to create a basic fact sheet through the eVestment reporting tool. Note: Complex fact sheets or complex report requests may require purchase of additional Professional Services.



## Support Check-Ups

An eVestment support professional will actively monitor your account and proactively provide suggestions to improve day-to-day processes. Set periodic meetings to help you continuously optimize the value of your eVestment solution. You will be able to choose from the checkup offering options for the structure that best meets your needs.

**Speak to your Client Success Manager or Sales Representative about upgrading to the Success Pack option that best aligns with your needs.**

\*Client conference registrations only applicable if a conference is occurring during the term of your contract.