Workday Success Plans: Program Terms

This document describes the features included in each of the Workday Success Plans available for subscription (Enhanced, Guided, and Guided with Elevated Support) and feature-specific terms.

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Summary

	Enhanced	Guided	Guided with Elevated Support
Discover			
Feature Release Reviews Live and recorded webinars delivered by the Workday product organization to learn about new product features of each bi-annual release and their intended benefits.	●	●	●
Learn On-Demand Subscription libraries containing short, topic-specific videos and job aids that Workday administrators in customer organizations can access for just-in-time learning to supplement instructor-led offerings.	●	●	●
Workday Customer Enablement Services Discount Special discounted pricing on select post-production offerings such as Review & Recommend, Jumpstart, and Customer Enablement consulting. A separate SOW or Order Form is required.	10%	20%	20%
Workday Pro Registration Fee Waiver Workday's customer-focused accreditation program. The registration fee waiver does not cover the cost of the individual training courses within the track and test re-take fees are not included.	●	●	●
Workday Rising Passes General admission to the event for the number of customer employees indicated.	1 / year	3 / year	3 / year
Support Models Working session between Workday and customer to dive into the details of a support model framework to guide customer success in production. Includes interactive knowledge sharing about leading practices and lessons learned, supplemented by activities covering topics such as tiered support, responsibility matrices, and governance charters. Up to two follow up sessions may be held, as needed.		●	●
Tenant One additional standard implementation tenant for core products at no additional fee, subject to standard Workday policies as described in Community.		●	●
Align			
Alignment Meetings Semi-annual alignment with a Customer Success Manager to review the status of adoption items from the Feature Adoption Planning workshop and uncover upcoming opportunities to leverage Workday Success Plans further as customers continue on their adoption journey.	●	●	●
Collaboration Crews Customers self-nominate to participate, share, brainstorm and collaborate with a group of peer customers in Workday-hosted virtual networking sessions. Not all customer nominations will be accepted into a Collaboration Crew.	●	●	●
Feature Adoption Planning Prescriptive tenant review with a Workday-led workshop designed to prioritize adoption opportunities that align customer business objectives with product features and services offered in Workday Success Plans to enable customers to reach their goals.*	●	●	●
Governance Plan Working sessions between Workday and customer to jointly define and manage a plan for ongoing engagement and communication to align the needs of customer's business to where its organization is in the lifecycle.		●	●
Strategic Plan Working sessions between Workday and customer to jointly define and manage a plan that translates business objectives into a long-term strategy that maximizes adoption and value across the Workday lifecycle.		●	●
Incident Management Designated incident management specialist coordinates technical support issues and supports the customer through critical or escalated incidents to drive toward a resolution as quickly and efficiently as possible.*			●
Operational Reviews Monthly review of priority support and technology related items, including Workday roadmap (performance, scalability), customer roadmap of large volume business events, production incident review (high severity cases, root cause analysis), and leading practices and self-sufficiency.*			●
SLA Reviews Monthly review metrics related to Service Availability.			●

	Enhanced	Guided	Guided with Elevated Support
System Health Insight Monthly review of optimization opportunities that can improve the health and performance of customer's tenant.*			●
Adopt			
Accelerator Webinars Live or on-demand sessions conducted by Workday experts to help customers discover product features, learn best practices, and understand the value through customer use cases. Live sessions include dedicated Q&A.	●	●	●
Adoption Kit Just-in-time, customizable materials for common employee and manager tasks, in addition to a wide range of templates and assets to help successfully roll out the Service across customer's organization.	●	●	●
Ask-an-Expert Personalized guidance from Workday experts to help customer's Workday Named Support Contacts troubleshoot configuration issues, provide advice on how to configure the Service to meet business requirements, and to explore Workday product features through demonstrations to understand how organizations can benefit. Limits apply as described below.*	●	●	●
Change Guidance Kit and Coaching Self-guided change management companion guide, templates, and webinars to help customer manage change across the organization as it relates to product feature deployments, scheduled releases, and enhancements. Coaching with a change expert available at the Guided level only.	●	●	●
Testing Guidance Kit and Coaching Self-guided materials, including templates to assist with strategy, planning and execution, to help customer effectively manage release testing activities. Coaching with a testing specialist available at the Guided level only.	●	●	●
Feature Accelerator Library of self-guided materials with personalized coaching designed to help with rolling adoption of product features. Feature Accelerator specialists will provide one-on-one coaching to help launch product features, overcome challenges, and grow customer product skills. Limits apply as described below.*		●	●

* This activity may require Workday tenant access

Region Availability

	Enhanced	Guided	Guided with Elevated Support
North America (NA)	●	●	●
Europe, Middle East, and Africa (EMEA)	●	●	●
Asia Pacific is limited to Australia, Malaysia, New Zealand, and Singapore (as of May 5, 2022)	●	●	●

Additional Terms

1.   Program Terms and Eligible SKUs. These Workday Success Plans Program Terms ("**Program Terms**") apply to the Workday Success Plans Program (the "**Program**"), and describe the services provided under the Program. Materials provided by Workday under this Program may be used solely during the subscription Order Term for the applicable Program and may be used solely to support Customer's own internal use of the Workday Service. Training materials may be provided only to Customer's Employees and Authorized Parties. Program activities are provided in English only. Only generally available Services are supported by the Program. Capitalized terms used in this document are defined in the Order Form, MSA or its attachments.

2.   Customer Responsibilities. Customer is responsible for facilitating and executing any Service product feature adoption or other plans developed through the Program, including ensuring Customer's users are ready and willing to adopt product features or plans. Customer is solely responsible for determining the configurations that best meet the needs and legal requirements of the Customer. While Workday makes suggestions and provides advice, Workday does not guarantee that any specific configuration or use of the Service will meet Customer's requirements. Customer is responsible for thoroughly testing and migrating all changes as it deems appropriate.

3.   Documentation and Recording. Apart from any logged request or case notes made (if applicable), or deliverables expressly required to be provided by Workday, Workday does not document the results of, or record, any Program session. Customer may record a Program session upon request during the session for later review in support of its own internal business purposes, in which case Customer must provide the platform for the call and recording. Notwithstanding the foregoing, if Customer is subject to any form of public records requirements such as (without limitation) Sunshine Acts, Open Records Acts, Freedom of Information Acts or the like, Customer shall not record any Program session. A copy of such recording will be provided to Workday upon reasonable request. Any Workday Confidential Information contained in a Session Recording remains the exclusive property and Confidential Information of Workday. Except as expressly permitted by Workday, Customer will not videotape, record, download, or duplicate the content in the training materials.

4.   Content Delivery and Communications. Customer acknowledges that any learning management system, media platform, video, or other technology or processes utilized to provide the Program, as well as any content, are not part of Service. Workday reserves the right to modify, update, and remove content at any time.

5.   Meetings and Scheduling. Where a Program feature calls for a meeting between Workday and Customer, Workday shall use commercially reasonable efforts to complete the meeting at a mutually agreeable time. All meetings will be conducted remotely.

6.   License to Customize Kits. During the Order Term, Workday hereby grants to Customer a non-exclusive, nontransferable license to use, copy, customize and create derivative works of the Kits provided as part of this Program solely for the purpose of internally distributing the relevant Kit material to promote internal use of the Service by Customer's authorized end users in accordance with the MSA. Customer is solely responsible for the accuracy of any modifications or customizations of the Kits made by it. Workday reserves the right to add or remove content from individual Kits and add or remove entire Kits in the library.

7.   Ask-an-Expert.
a. Customer must use the current Workday processes to submit a request to engage a Workday Ask-an-Expert specialist, and may only submit requests for Service SKUs to which Customer has subscribed. If the request is for Workday to access a Customer Workday Tenant, such request must include detailed instructions identifying the non-Production tenant to be accessed and the specific issue(s) to be addressed (a "**Request**"). Customer cannot change the Request once it has been submitted, but Workday and Customer are permitted to clarify the scope of each Request and finalize Customer's instructions using Request notes logged via Workday's Request system. For questions that are outside the scope of the Request as submitted, Customer is permitted to submit a new Request. Sensitive information and Customer Data should never be included in a Request.

b. The maximum number of Requests per calendar week are listed below and do not accrue or roll over if not used. If Customer cancels a Request within one (1) hour of submission, the Request shall not be forfeited, and Customer is permitted to re-submit the Request in the same calendar week. Workday is permitted to close any Request if Customer does not respond to Workday's response or requests within three (3) business days. The Request count is refreshed at 12:01 am Pacific Time every Sunday.

Ask-an-Expert Number of Requests	Enhanced	Guided
Platform* Customer	3 per week	5 per week
Non-Platform Customer	2 per week	4 per week

*A Platform Customer for this Program means a Customer with an active subscription to either the HCM or Core HCM SKU <u>and</u> the Core Financials SKU.

c. A specialist will review each Request and determine if there is a need for a meeting to clarify the Request or to discuss the recommended changes. Some Requests may be resolved without a meeting. Should the Specialist determine that the effort to complete the Request is outside the scope of Ask-an-Expert, Workday reserves the right to advise the Customer on another option to address the Request outside of an Ask-an-Expert.

d. For clarity, Ask-an-Expert does not include or replace implementation professional services or production support. Ask-an-Expert operates during common regional business hours Monday to Friday, excluding holidays as observed by the parties, and is not available 24/7. Tenant access by an Ask-an-Expert specialist is limited to the Customer's Workday HCM/FIN Tenant, excluding Workday Government Cloud.

8.   **Feature Adoption Planning.** Customer has the option to participate in one Feature Adoption Planning session no more frequently than every 18 months after go-live.

9.   **The Feature Accelerator.** The Feature Accelerator coaching series includes up to four (4) sessions per Feature Accelerator and is designed to be completed within a two-week time period. Platform customers may have two coaching series active at a time and non-Platform may have one.

10.   **Workday Rising Passes.** Passes to the Workday Rising annual customer event (or substitute event at Workday's discretion). Customer is responsible for all travel and other expenses. The total number of passes provides admission for a single event each year. Passes are not transferable and are available for use only in the then-current year and will not rollover to subsequent years. No retroactive group registration qualification is permitted and no refunds will be provided if the event is substituted or canceled.

11.   **Guided Plans.** Customer will be assigned a designated senior level services contact who will lead overall account strategy and execution, including the Governance and Strategic Plans as described in the table above. Acting as an extension of Services leadership across the full customer lifecycle, they will cultivate Customer executive sponsor relationships, advocate for Customer at the Workday Executive level, and provide a single point of contact and accountability for overall relationship with Workday. Details of the governance plan will be jointly defined by Customer and Workday to include activities such as alignment of Workday and Customer executive interactions, coordination, and participation in Workday events and programs, participation in steering committee, and oversight on account level issue resolutions.

12.   **Elevated Support.** The standard definitions and response times in the Workday SLA continue to apply to all Elevated Support features that are subject to an SLA. Elevated support reviews may require tenant access. Customer will be assigned a designated specialist for Elevated Support features. These features include operational and SLA reviews, single point of contact within support for crisis and escalation management, as well as system health insight discussions as described in the table above.

13.   **Future Product Offerings.** Not all future products offered by Workday will be covered under this Program.