ARROW

Customer Success Overview

Understanding Customer Success

An overview to CS process and benefits

- What does CS do?
- What is the standard CS process?
- Why continue to use CS?

What does Customer Success do?

Simply put, CS helps customers go live on Arrow, but our CS will also help existing customers with systems administration and facilitate communication with technical teams on necessary integrations.

What is CS responsible for?

As a standard, CS works directly with Arrow clients to build a rollout strategy and timeline during onboarding. They ensure timely setup and configuration requests at the client’s discretion.

They are responsible for client-facing onboarding tasks, which might require working directly with technical teams to implement integrations where necessary.

CS might also conduct in-person and virtual training sessions for specific users based on the number of users and level of customization of the platform.

—

Onboarding Tasks

As part of the onboarding process, CS will deal with a variety of tasks that cover configuration, data submission, and various other settings:

- Domain verification
- Brand x ARROW consistency
- Users
  - User invitations and credentials
  - Phone number setup
  - Roles & Permissions
- Data submission
  - Inventory
  - Customer list and history
- Module adoption
  - Added features and upgrades
- Configuration details, *including but not limited to:*
  - Dealership or Make-specific
    - Equip & JD Quote Connect
    - Other External Systems
  - Deal Mode configuration
  - Quoting templates
  - Ad & paid accounts connection
  - Marketplace settings
  - Campaign and Preset Lists
- Billing setting *(future invoices)*
- Training

CS Timeline

Arrow onboarding comes with 90 days of Customer Success Management. That is the average time it takes to take a new client from their first bill to live and operating in our system.

Arrow strives to shorten that time period so that our clients' and the breath of their teams can hit to ground running. Once clients are live, they have to option to enroll in ongoing Customer Success Management for $999/month.

Customer Success Standard Process

Here's what you can expect from the CS Team during the 90-day Onboarding period: from "Yes" to Live

CS Handover

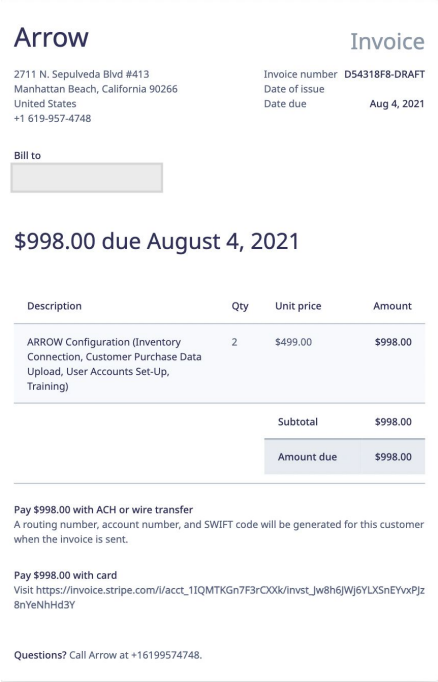
Client	CS
Joins Arrow via BD Team *(Welcome!)* - *Number of Users* - *Feature adoption*	Generates Invoice with BD Approval

INVOICE IS PAID — Day 0

Client	CS
Fills and submits Form Provides Domain, User, Customer, and Inventory data + necessary Integrations	Sends external Onboarding form Form is verified Onboarding Task Flow Schedules and conducts Training

CLIENT GOES LIVE — Day 90 or before

Invoice & Secure Payment Link



Arrow

Invoice

2711 N. Sepulveda Blvd #413
Manhattan Beach, California 90266
United States
+1 619-957-4748

Invoice number D54318F8-DRAFT
Date of issue
Date due Aug 4, 2021

Bill to

$998.00 due August 4, 2021

Description	Qty	Unit price	Amount
ARROW Configuration (Inventory Connection, Customer Purchase Data Upload, User Accounts Set-Up, Training)	2	$499.00	$998.00
		Subtotal	$998.00
		Amount due	$998.00

Pay $998.00 with ACH or wire transfer
A routing number, account number, and SWIFT code will be generated for this customer when the invoice is sent.

Pay $998.00 with card
Visit https://invoice.stripe.com/i/acct_1IQMTKGn7F3rCXXk/invst_Jw8h6JWj6YLXSnEYvxPJz8nYeNhHd3Y

Questions? Call Arrow at +16199574748.

Invoice is generated and sent via Stripe, where new clients can securely pay their invoice.

Successful payment sends the CS Team a notification that client is ready to onboard.

Welcome Email

Client can expect to receive a Welcome Email from their assigned CS Manager.

A link to their Onboarding form is included and should come prefilled with their Business Name.

Hi [Contact Name],

Welcome to Arrow, we are excited to work with you and begin onboarding! You can find our onboarding form linked below. Please complete this to the best of your knowledge, yet in the event questions arise, don't hesitate to reach out!

[Click Here] - EXAMPLE FORM LINKED HERE

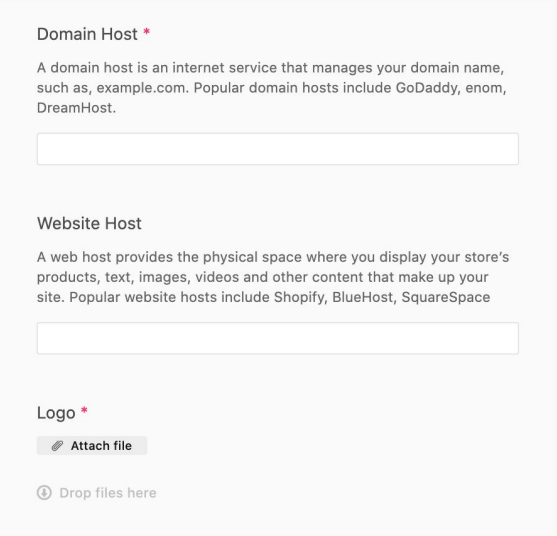
Once completed our team will begin reviewing and configuring your Arrow system. We will follow-up directly if clarity or further info is needed, yet do feel free to follow-up with us here at any time in the process.

All the best,
[CSM Name]

Onboarding Form

The Onboarding Form collects the basic information necessary to setup an environment in Arrow as well as other configuration details:

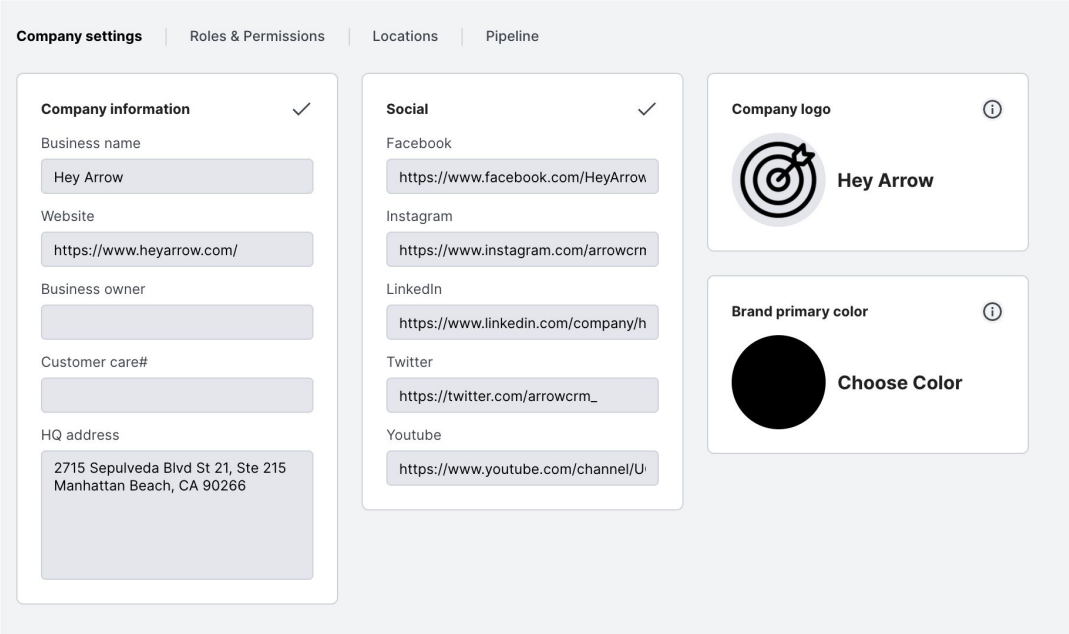
- # of Users
- Domain name
- Domain host
- Website host
- Logo file
- Brand color
- Quote template file
- Ads accounts to be linked (marketing-specific)
- Upload method and note fields for:
    - User data
    - Customer data
    - Inventory data



Descriptions are in included for each field to guide clients, but they welcome to request guidance from CSMs where needed.

Brand Consistency & Company Settings

We request Logo and Brand color Hex to make each work environment in Arrow consistent with company branding. This is handled during configuration, along with Domain validation and IP Assignment for the environment.



User Upload

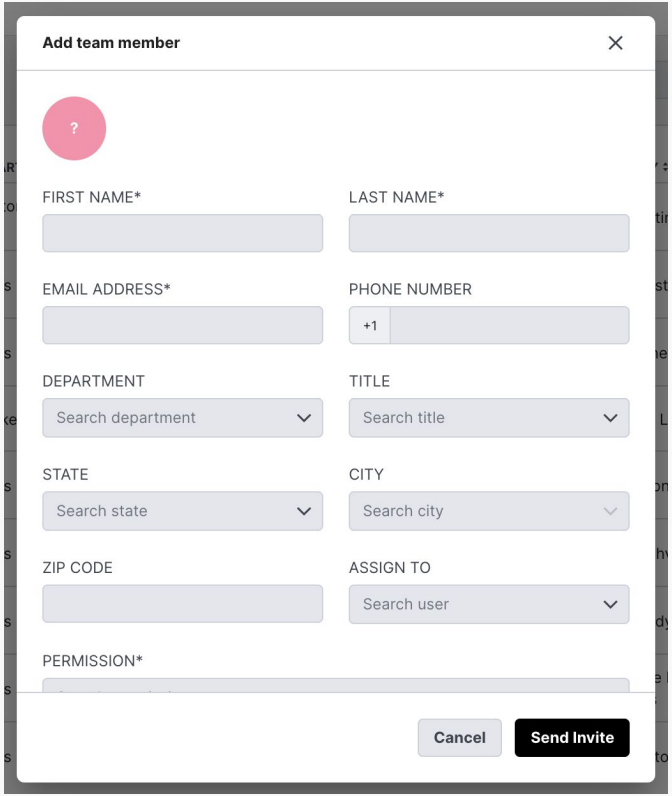
Will differ based on the method of data upload, but in order create User accounts, Arrow will need:

- First name
- Last name
- Phone number
- Email address
- Location: City, State
- Role / Title

Manual setup is also available to Admins and adequate permissions.

Those are assigned based on user groups, which fall under one of 3 Permissions levels, typically the following:

- **Basic:** Support & Internal users
- **Advanced:** Sales & External facing users
- **Pro:** Execs, Directors, Sr Managers / Administrators



User Roles & Permissions

Company settings | **Roles & Permissions** | Locations | Pipeline

Departments

- Admin
- Customer Success
- Executive
- Management
- Marketing
- Product
- Sales
- Talent Acqusition

Titles

- Admin
- Brand Manager
- Customer Success Manager
- Director of Talent Acquisition
- Executive
- Finance/Reporting
- Product Manager
- Sales Manager
- Sales Rep

Permissions

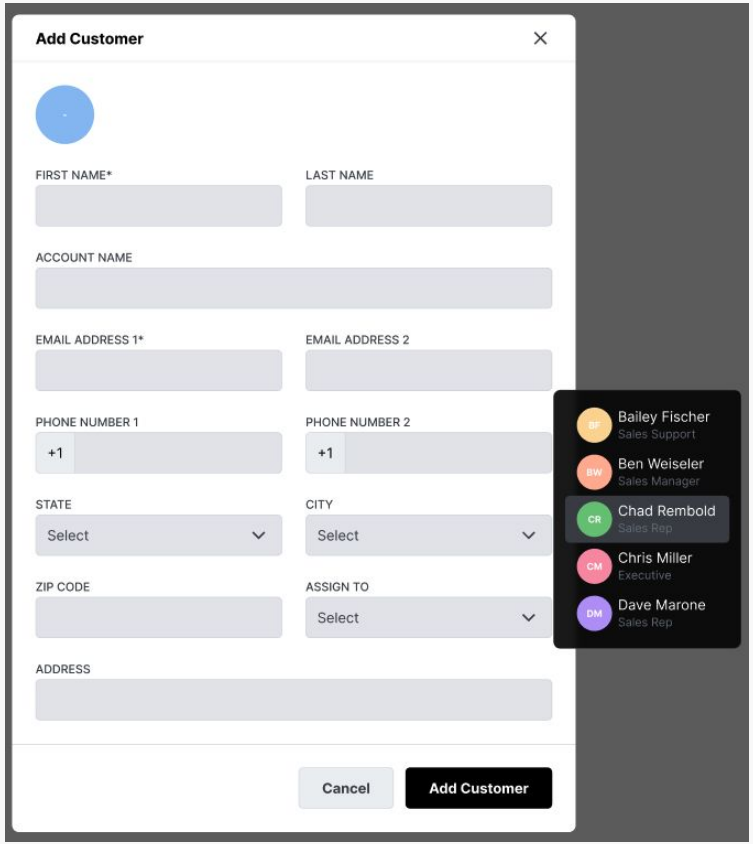
GROUP	BASIC	ADVANCED	PRO
Access to platform			
Access mobile app	✓	✓	✓
Access web app	✓	✓	✓
Admin			
Update team			✓
Update reporting to			✓
Create team member			✓
Deactive team member			✓
Create department			✓
Create role			✓
Update role			✓
Update permissions			✓
Campaign			

Customer Upload

Customer data can be submitted in different formats, but should be uniform and match Arrow data fields. CSM can walk clients through what those fields are and help adapt to the field that exist in their current customer base.

Some data might be lost if discrepancies are significant. It is especially important when upload purchase history as each client might handle their records differently.

Back-end teams will handle upload and communicate any challenges to CSMs.



Inventory Upload or Connect

Similarly to Customer data, the Arrow back-end Team will communicate what the process flow will look like based on the source of the data. Depending on the vertical and brand, inventory upload might require additional integrations.

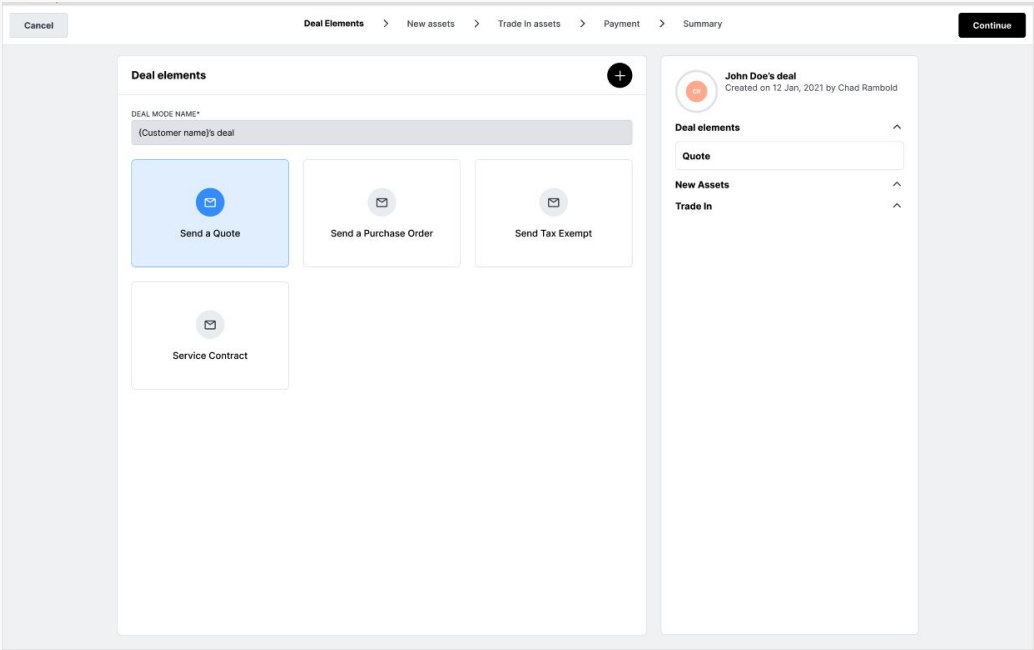
Inventory Connect is particularly important as it feeds into the Arrow Feed, Products, and Marketplace.

It is encouraged to get technical teams involved at this stage based on where inventory will be coming from should they need to inform our teams of API or feed if applicable, frequency of updates, and other factors that affect Inventory.

Deal Mode

Deal Mode is a proprietary Arrow tool meant to increase sales velocity by creating a streamlined process for each Sale opportunity.

Setting up might require configuration of Quoting, Deal Elements, Trade-in valuation tools, and Payment preferences.



Templates

Arrow will work will clients on formatting their quotes, invoices, and other deal elements to integrate with Deal Mode.

Options to create new docs from Arrow templates are also available.

Company settings | Title & Permissions | Locations | Pipeline | **Documents** | Arrow Share rules | Ad Accounts

Warranty & Loaner Program

DESCRIPTION	GOLD	SILVER	BRONZE
Loaner Program	1yr or 1000hrs	6mo or 500hrs	2mo or 250hrs
Extended Warranty	36mo / 2000hrs Full Warranty	36mo / 2000hrs Powertrain & Hydraulic	36mo / 2000hrs Powertrain
Financing	$0 down, 0% $1,223 monthly 60mo.	0 down, 0% $1,103 monthly 60mo.	0 down, 0% $1,089 monthly 60mo.

ARROW

2711 N Sepulveda Blvd, 413
Manhattan Beach, CA 90266
heyarrow.com

Charles Anderson
+1 (619) 957-4748
charles@heyarrow.com

Date: 02/12/2021
Quote ID: 0024335
Valid thru: 03/13/2021

Chris Farming
c/o **Christopher Pawelski**
Country Rd 25
Windom, MN 56101
+1 (989) 872-1314
chrisfarming@gmail.com

Year	Make	Model	Condition
2021	Bobcat	E35 25 HP	New

Serial Number	Category	Hours
B3Y218464	Excavator	2.20

Qty	Stock #	Description	Unit Price	Taxable	Line Total
1	35854	2021 Bobcat E35 25 HP	$ 24,073.00	Y	$ 24,073.00
1	N/A	Bobcat Core+ Package Option	$ 4,915.00	Y	$ 4,915.00

Subtotal	$ 28,988.00
Applicable Discounts	($ 0.00)
Taxes (5.00%)	$ 1,449.40
Other fees	$ 250.00
Total	**$ 30,687.40**

Why use Customer Success?

Once the 90-day Onboarding period is over or the new client is live, Arrow users can choose to continue working with the CS Team for their growth and adoption needs.

Ongoing Tasks

Clients can choose to continue getting support from CS for the following:

- User Updates
  - Additional Users
  - Credentials
  - Phone number setup
  - Roles & Permissions
- Uploading New Inventory
- New Features
  - Guidance with feature adoption
  - Ongoing configuration needs
  - New Features Training
- Deal Mode Updates
- Templates
- Marketplace Updates
- Arrow Rules
- Arrow IQ & Reporting
- Marketing lists
- Billing settings
- *etc.*

System Admin

Clients can choose to use CS as an ongoing resource for system settings, preferences, user setup, and various other changes that growing teams might require over time.

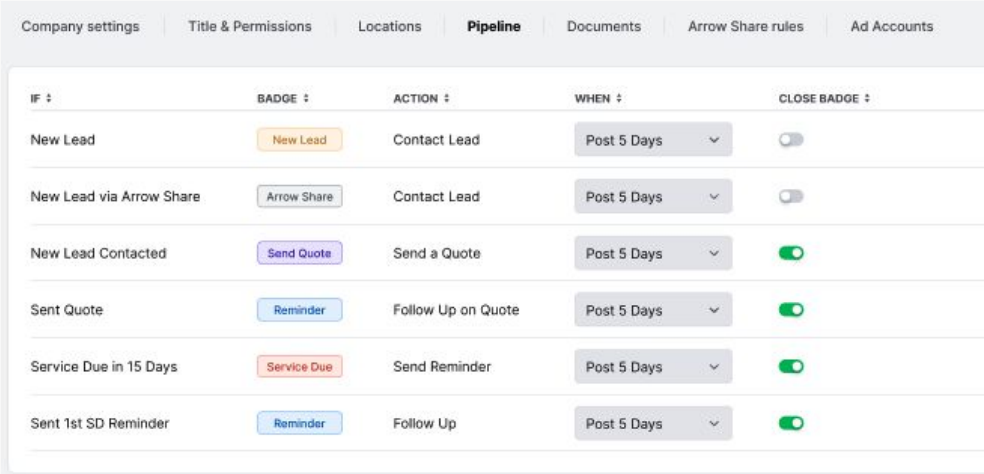
This includes but is not limited to:

- Adding users and setting roles and permissions
- Updating current users and other configuration settings addressed during onboarding
- New features guidance and setup

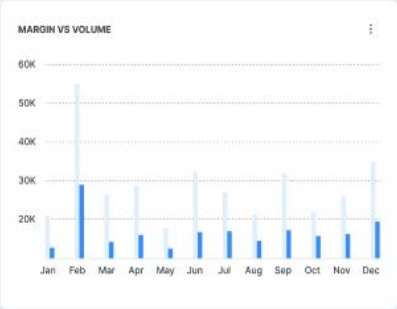
CS will help carry out some of the system housekeeping items through a ticketing system so that clients can continue to focus on their daily tasks.

Automation & Customization

Arrow features boost growth, marketing, and sales, these can be even more beneficial when updated and monitored on an ongoing basis. CSMs can help clients course-correct and automate.



Arrow IQ



Teams Report

FULL NAME	DEPARTMENT	TITLE	REPORTING TO	VELOCITY	AVERAGE	ORDER	VALUE	CONVERSION	TAGGED	CUSTOMER	SHARED	QUOTED	CLOSED	VOLUME	DEAL MODE
Mike Espenson	Sales	Sales Manager	Ryan King	-	-	-	-	-	11	1	$2.0M	$2.0M	$2.0M	2	$2.0M
Brett Block	Sales	Sales Manager	Wayne Huber	-	-	-	-	-	11	1	$2.0M	$2.0M	$2.0M	2	$2.0M
Ryan King	Support	Sales Support	Admin	-	-	-	-	-	11	1	$2.0M	$2.0M	$2.0M	2	$2.0M
Gord Groen	Sales	Sales Rep	Chad Wiener	-	-	-	-	-	11	1	$2.0M	$2.0M	$2.0M	2	$2.0M
Jace Poulsen	Sales	Sales Manager	Wayne Huber	-	-	-	-	-	11	1	$2.0M	$2.0M	$2.0M	2	$2.0M
Ben Weilsner	Support	Sales Support	Ryan King	-	-	-	-	-	11	1	$2.0M	$2.0M	$2.0M	2	$2.0M
Shayne Hansen	Support	Sales Support	Wayne Huber	-	-	-	-	-	11	1	$2.0M	$2.0M	$2.0M	2	$2.0M

Ongoing support in setting up reporting tools.