Managed Success Plan

Achieve business success faster with the Managed Success Plan. Your investment and ROI in Ellie Mae solutions depends on having the right resources to make sure your achieving business goals faster and that your system is running at peak efficiency.

The Managed Success Plan from Ellie Mae® allows you to leverage a Customer Success Manager and expert-level Encompass® talent that acts as an extension of your team, helping them to successfully execute on business goals and initiatives.

Your Customer Success Manager works closely with your team, the Ellie Mae Virtual Admin, and the Ellie Mae Customer Success Engineer to identify, clarify, and execute on business goals, review and ensure best practice insight on the status and progress of your current deliverables and action items, and clarify and identify future initiatives and goals. Your Customer Success Manager will also keep you informed about upcoming product releases, hot product updates, and trending issues that pertain to your Encompass usage.

Customer Success Manager Benefits:

• Single point of contact for a consistent, positive customer experience
• Provides high-touch service
• Allows for extended team partnership within Ellie Mae
• Business-level collaboration delivers greater insight in all relevant areas
• Collaborates and delivers perspective on big picture business overview
• Drives high level monitoring of incidents, open issues, and trends
• Manages continuous check-in meetings
• Keeps you informed about service packs and critical patches
• Ensure awareness around events and announcements relevant to your business
• Provide updates on the knowledge center
• Details each project in progress (i.e., how many hours scoped, hours used, what is left, what specifically has been done, what is left to do)
• Keeps your team in the loop on upcoming Ellie Mae initiatives

Reach us at 1-888-955-9100 or sales@elliemae.com for more information.
Managed Success Plan Services¹

Encompass customizations often lay beyond either the expertise or resources of in-house staff. Our experienced team of solution architects, industry experts, and specialists can help keep your system running at peak efficiency. The Ellie Mae technical support program provides you with answers to your technical issues, while the Managed Success Plan subscription program adds the next layer of assistance for your Encompass solution.

Business Rules:

• Review current environment for best practice
• Create general Business Rules as requested, with exception of heavy Advanced Coding
• Full review of all Business Rule Settings
• Create and/or Review Input Form List(s)

Knowledge Transfer:

• Review Encompass Settings in current environment and advise on functionality and best practices
• Review Company User Setup for best use of Hierarchy, User Groups, Roles, and Milestones
• Review of Fee Mapping section and Mavent functionality
• Review Resource and Compliance Center
• Review of State Matrix and behavior

Templates:

• Full review of Loan Templates
• Review Plan Codes and impact of being tied to Loan Programs
• Full review of Template Sets to ensure maximum efficiencies
• Create and/or Review:
  ◦ Loan Template Sets, including: Loan Programs, Data Templates, and Closing Cost Templates
  ◦ Document Sets, including: eFolder Setup, eDisclosure Packages and Documents based on State Disclosure Matrix

Managed Success Plan Service Levels:

<table>
<thead>
<tr>
<th>Service Level</th>
<th>Silver</th>
<th>Gold</th>
<th>Platinum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term</td>
<td>6 Months</td>
<td>Annual</td>
<td>Annual</td>
</tr>
<tr>
<td>Contracted Hours²</td>
<td>30</td>
<td>60</td>
<td>120</td>
</tr>
<tr>
<td>Billing Cycle</td>
<td>Monthly</td>
<td>Monthly</td>
<td>Monthly</td>
</tr>
<tr>
<td>Customer Success</td>
<td>Monthly</td>
<td>Monthly</td>
<td>Monthly</td>
</tr>
<tr>
<td>Manager Check-In</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

¹Special service requests that fall out of scope will be considered and negotiated on an as needed basis.

²Hours divided quarterly, plus or minus 5 hours buffer per quarter. Hours are available quarterly, with no rollover into the next quarter.