Service Description

Outcome-Based Services

Version:	1.0
Status:	Draft
Released:	2026-04-01

Table of Contents

1 About this document

This document forms part of the Documentation and describes the Outcome-Based Services provided to the Customer under the Agreement.

In the event of a conflict between this Outcome-Based Service Description and the Agreement (including any Order Form or SOW), the terms of the Order Form shall prevail, followed by the MSA, unless expressly stated otherwise.

The services are outcome-based and delivered as an annual subscription during the term specified in the relevant Order Form, and in accordance with the Agreement.

1.1 Product Support Plans

This document does not cover Tacton's Product Support Plans, the scope of Tacton's Product Support Plans is described in Tacton's Support Handbook.

Tacton Support Handbook is available here: Tacton Support Handbook

2 Benefits

Benefits of the annual subscription include:
- **Continuous Value realization:** Outcome-driven services aligned with Customer's evolving priorities and business priorities
- **Strong partnership alignment:** Continuous, long-term engagement from both parties
- **Risk Mitigation:** Proactive, Strategic support with regular reviews and roadmap insights
- **Faster Time to Value:** Flexible access to Tacton's domain expertise and no SOW-cycles
- **Predictable and stable cost structure:** Stable fees, easier budgeting, less approval overhead.

3 Scope & Delivery

Tacton's Outcome-Based Services are designed to help accelerate the Customer's business outcomes through pro-active and continuous solution improvement over time.

Tacton shall deliver the Service Elements included in the Outcome-Based Service Plans as per Section 5.1 as well as services from Tacton Service Catalog, Section 6 and any Specific Service Packages, Section 7 requested by the Customer and mutually agreed to support the Customer's targeted business outcomes.

Work that requires a defined scope, timeline, dedicated resources, or project management, for example major upgrades, new module implementations, complex integrations, data migrations, will be handled separately under a separate Statement of Work (SOW).

3.1 Service Delivery

The services are delivered progressively over the subscription term through a jointly managed Customer Roadmap, which is reviewed regularly and adjusted based on evolving priorities, business needs, and achieved outcomes.

3.2 Expected Business Outcomes

At the start of the subscription term, Tacton and the Customer jointly define the targeted business outcomes. Examples of Business Outcomes include key performance indicators

("KPIs"), such as increased profitability resulting from a higher volume of quotes, reduced sales cycle time per quote, and a decrease in production-related errors or issues.

These expected business outcomes serve as guiding principles for identifying, evaluating, and prioritizing adoption and solution optimization activities, which are documented in the jointly managed strategic and tactical Customer Roadmap.

Expected Business Outcomes are delivered in three ways:

- **Service Elements:** Included as part of the Outcome-Based Service Plans, Section 5
- **Service Catalog:** Pre-defined Service Packages, Section 6
- **Specific Service Package:** Customer specific request for a service package that Tacton estimates towards Service Credits, Section 7

3.3 Strategic and tactical Customer Roadmap

The Outcome-Based Services engagement is defined at least annually in a jointly agreed strategic and tactical Customer Roadmap aligned to the business objectives the Customer intends to achieve through its CPQ solution.

The Customer Roadmap will undergo continuous evolution, and priorities may be adjusted at any time at the discretion of the Customer.

Examples of services to be defined in the Customer Roadmap:

- Optimization of existing Tacton CPQ functionalities
- Product model optimization, enhancements and maintenance to support existing and new product lines
- Coaching and best practice advisory, including expert review of models and solution architecture aligned with Tacton standards
- Pricing model configuration, refinement, and maintenance to support dynamic and region-specific pricing strategies
- Proposal and document generation management, including continuous improvement of CPQ-generated templates
- Workflow design and optimization, including guided selling and approval processes
- User enablement and adoption support, including training guidance
- Integration advisory and functional support relating to interactions between Tacton CPQ and other enterprise systems

3.4 Service Planning

To ensure effective planning, the Customer provides a prioritized list of focus areas for solution optimization at least one month in advance. This allows us to align the right expertise and resources to upcoming needs in line with the activities defined in the Customer Roadmap.

Based on these priorities, Tacton assigns team members with the appropriate skills and experience to address the identified service needs.

Tacton aims to maintain continuity in the team whenever possible. If a change in assigned experts is needed, we ensure a smooth transition and proper knowledge transfer to minimize any disruption.

3.5 Engagement Model

The following key roles are available to customers in the Outcome-Based Plans. Depending on the nature of the activities defined in the joint Customer Roadmap, Tacton may assign additional resources to manage the engagement.

Tacton Key Roles after go-live	
Customer Success Manager	- Main point of contact following project handover, responsible for managing the overall customer relationship and ongoing success journey. - Facilitates discussions on business goals and success metrics and documents them in the Customer Roadmap. - Tracks key metrics and reports on focus areas in line with the Customer's objectives. - Coordinates planning, prioritization, and delivery according to the Customer Roadmap. - Runs Executive Business Reviews and operational meetings, including planning for SME capacity, Service Catalog services, and Specific Service Packages. - Shares Tacton updates, new features, and best practices.
Solution Advisory	- The Solution Advisor is your technical partner for ongoing guidance and coaching to optimize your solution. - Identifies when to conduct the included proactive solution and model reviews. - Advises on relevant Service Catalog packages and whether a Specific Service Package is needed. - Answers questions and provides best-practice guidance and coaching before issues arise. - Coordinates and brings in the right Subject Matter Experts to help optimize the existing solution.
Subject Matter Experts	Tacton assigns the most appropriate Subject Matter Experts based on the planned focus areas, for example: - Industry Experts sharing knowledge on leading Manufacturing Best Practices and Success and Outcome Metrics for CPQ. - Certified technical experts in product and price modeling, workflows, document generation, integrations, UX enhancements, change management, and broader CPQ capabilities.

3.6 Escalations

Escalations relating to the Services provided by Tacton under this Agreement shall be managed in the following order:

1. Tacton's Customer Success Manager
2. Tacton's VP of Customer Success Management

4 Service Credits

The Service Credit entitlement specified in the Customer's Order Form may be used in three ways: (a) to extend included service elements, (b) for services in the Service Catalog, and (c) for Specific Service Packages.

Terms and conditions for the use of Service Credits are specified in the Outcome-Based Services Schedule that is part of the Agreement.

Service Credits are intended to be planned and used on a reasonably even basis throughout the applicable subscription year and in accordance with the service planning principles described in Section 3.4.

5 Outcome Based Service Plans

The Outcome-Based Service plans include Tacton defined Services Elements that have proven necessary for a successful partnership and to ensure continuous product adoption and optimization in order to achieve prioritized Business Outcomes.

5.1 Included Service Elements

The Included Service Elements are grouped in four main categories:

- Strategy and Value
- Solution Optimization
- Training
- Innovation & Knowledge sharing

The tables below outline the service element descriptions and entitlements in each of the four main areas.

5.1.1 Strategy & Value

Service Element	Description	GROWTH	OPTIMIZE	INCLUDED
Customer Success Manager	Access to Tacton's Customer Success Management team, responsible for the strategic relationship and your satisfaction with Tacton's products and services.	Appointed	Appointed	Team email
Targeted Business Value and Success Planning	Jointly define a Customer Roadmap that continuously drives Success KPI:s for Value realization, Engagement and Adoption. Outcome based KPIs defined using Tacton CVET Methodology. Tacton summarizes the Customer Roadmap strategic- and tactical focus areas for the coming quarters in a written format made available to the customer after the initial workshops.	✓	✓	-
Strategic Customer Business Review	Recurring strategic reviews that track KPI attainment and validate value against the Customer Roadmap, including updates on product- and business strategy.	Twice per year	Annually	-
Operational recurring meeting	Check-ins with CSM for continuous alignment on progression against the Success Plan and recommendations on how to use Service Credits to optimize outcomes through solution optimization and increased adoption.	Monthly	On request (max monthly)	-

	These meetings also support planning and allocation of Subject Matter Experts.			
Engagement & Portfolio Performance Insights	Data-driven reviews and recommendations based on the customer's available analytics data as input for: - Improved Engagement and Adoption. - Highlight data points of interest in PPI analytics to enable identification of potential improvements related to areas such as Sales Performance, Product Line Performance or Assortment Control. PPI recommendations require that the Customer has purchased the Tacton Analytics add-on and agreed to provide Tacton with access to the relevant analytics data. Tacton summarizes the review and insights into a written format made available to the customer after the workshop.	Twice per year	Service credits	-

5.1.2 Solution Optimization

Service Element	Description	GROWTH	OPTIMIZE	INCLUDED
Solution Advisory & Coaching	The primary purpose of Solution Advisory & Coaching is to provide guidance on the overall health, maturity, and completeness of the Customer's solution. Services are delivered through regular, short sessions with the assigned Solution Advisor and/or Subject Matter Experts to provide guidance on: - how to further mature and enhance your CPQ solution, - how to use Service Credits to achieve most value, - scoping and identifying which service packages that are relevant, - answer "how-to" questions, - advise design decisions etc. Any other type of work, i.e. hands-on implementation work or joint tasks delivery, can be considered to be delivered under this Service Element only if overall solution is mature, stable and complete. Tacton will select SMEs based on the Customer's needs. Assumed average session duration is ~1h.	2 sessions/ month	1 session /month	-
Solution Advisory & Coaching – Upgrade	Customers in need of more Advisory and Coaching can upgrade to a total of 4 sessions per month for 1 Service Credit per session. Total customer-facing Solution Advisory meeting time may not exceed four (4) hours per month.	Up to additional 2 sessions per month	Up to additional 3 sessions per month	-
Solution Review	A full proactive review of your entire Tacton solution, beyond the product model, to find areas to optimize and identify risks before they turn into issues. Our experts identify improvements to achieve your success KPI's, boost performance, reliability and	Annually	Service credits	-

	maintainability across product models, integrations, pricing, workflows and infrastructure. Customers on the Optimize plan may use Service Credits to access a Solution Review, as specified in the Service Catalog.			
CPQ Product Model Reviews	Our experts proactively review your Product Models (TC or ProMo) and suggest improvements to optimize performance and ease of maintenance and identify risks before they turn into issues for your modelers. The Customer can use Service Credits to review additional # of models, the service is specified in the Service Catalog.	3 models/ year	1 model/ year	-

5.1.3 Training

Service Element	Description	GROWTH	OPTIMIZE	INCLUDED
Tacton Basic Training	Access to Tacton Academy's interactive learning environment, including self-paced Tacton CPQ Basic Training and focused "how-to" microlearning courses.	✓	✓	✓
Full eLearning courses	Number of Admin users with 24/7 access to Tacton Academy's <u>complete</u> library of eLearning courses.	up to 15	up to 5	1 user
eLearning tutor	Combine the convenience of self-paced eLearning with interaction with Tacton's training experts in an eLearning Q&A session (30-45 minutes). "On demand" means a Q&A session scheduled by the Customer and delivered within two (2) weeks of request.Q&A sessions are limited to two (2) sessions per year.	Meeting On demand	E-mail	E-mail
Release Training & Guidance	Learn about the latest features through access to "What's New in Tacton CPQ" webinars.	✓	✓	Recording
Release guidance	A session with Tacton experts reviewing the most recent six months	Every six months	-	-

	of product releases, tailored to the features and changes most relevant to the Customer's Tacton CPQ environment.			
Instructor-led training	Build your Tacton Administrators' skills through hands-on practice in highly interactive training sessions with a Tacton Certified instructor. 3 Tacton scheduled public courses limited to 3 seats per course, bundled courses are excluded from this Service Element.	3 Tacton scheduled courses	Service credits	-
Certifications	Master Tacton CPQ Administration: Certify your Tacton Administrators in setting up and maintaining Tacton CPQ.	1 certifi-cation included annually	Service credits	-
Certifications	Master Tacton CPQ Product Modeling: Certify your Tacton Administrators in setting up and maintaining Tacton configuration models and data.	1 certifi-cation included annually	Service credits	-

Tacton Academy Courses are available here: <u>Tacton Academy	Expert Training for Manufacturers</u>

5.1.4 Innovation and Knowledge sharing

Service Element	Description	GROWTH	OPTIMIZE	INCLUDED
Engage with Tacton CPQ product team	Direct sessions with Tacton Product Management to discuss early roadmap insights, pilot opportunities, and the Customer's future needs and perspectives.	✓	-	-
Tacton Customer Advisory Board	An exclusive executive forum for strategic dialogue between your business leadership and our executive team, focused on business performance, industry trends, long-term value creation, and aligning future priorities and innovation initiatives.	✓	-	-
Tacton Summits	Events where Tacton customers, partners, and experts meet to share industry insights, knowledge, and best practices.	2 guaranteed seats	First-come, first-served sign-up	First-come, first-served sign-up

6 Service Catalog

Customers in Tacton's Outcome-Based Services Plans have access to Tacton's Service Catalog.

The Service Catalog provides access to certified Tacton consultants and over 100 predefined service packages and training courses to review, optimize, and maintain your CPQ platform.

Available expertise includes product and price modeling, workflows, document generation, integrations, UX enhancements, Change Management, and overall CPQ capabilities.

> The Service Catalog is available through your Tacton Customer Success Manager and/or Account Representative.

7 Specific Service Packages (SSP)

Services not included in the Tacton Service Catalog may, at the Customer's request, be scoped and estimated by Tacton in Service Credits.

The Specific Service Package Scope is defined in a Request for Specific Service Package and includes a problem description, objective and scope definition, expected outcomes/deliverables and an estimate in Service Credits.

Requests are managed using Tacton's Atlassian JIRA.

A single Specific Service Package cannot exceed ten (10) Service Credits. If the criteria cannot be met either the scope needs to be broken down into several smaller Specific Service Packages, or Tacton will offer a Statement of Work instead.

8 Other Success Resources available

Below is a list of resources available to all Tacton customers, regardless of the selected service or support plan.

Service Element	Description	GROWTH	OPTIMIZE	INCLUDED
Product Releases and Updates	Automatic weekly product releases in your "Early Access" and production environment and access to regular release highlight videos.	✓	✓	✓
Help center	Empower your Admin users to set-up and maintain Tacton CPQ with extensive product documentation.	✓	✓	✓
Tacton Community Forum	Ask questions and get answers from Tacton experts in our community forum. Get inspired and learn best practices from other Tacton customers.	✓	✓	✓
Customer newsletter	Get inspired by thought leadership, business trends, CPQ success stories, best practices and more to help you get the most out of your Tacton CPQ.	✓	✓	✓