Workbooks.com

WORKBOOKS
Advisory Packs

Introduction

Advisory Packs are designed for customers who are

LOOKING FOR HELP IN THE SETUP AND DEPLOYMENT OF WORKBOOKS

Advisory Packs give you access to a Workbooks Implementation Consultant who will provide you with help and guidance on how best to deliver a successful outcome to your project.

When you purchase an Advisory Pack you will be allocated a number of points, these points can be used for any of the following:

- Implementation advice and guidance
- Workbooks configuration
- Data migration
- Report writing
- Developing automation scripts

How
IT WORKS

Once you have purchased your Advisory Pack you will be allocated a named Implementation Consultant who will be your primary point of contact. You will discuss your requirements with the Consultant and agree what work needs to be undertaken by Workbooks and how many points will be required for each piece of work.

An example might be:

DESCRIPTION	POINTS REQUIRED
1 hour requirements conference call plus brief write up	2 points
Creation of PDF Quotation Template	8 points
Import of Contacts from CSV file (correctly formatted and supplied by customer)	4 points
Walk-through of MailChimp setup (webinar)	2 points
Total Points:	**16 points**

THE
Benefits

GUIDANCE FROM OUR TEAM OF EXPERTS

Advisory Packs are great for customers who are just getting started on their CRM journey and are looking for some help from one of our experts. You have access to a pool of knowledgeable consultants that have completed hundreds of implementations. They can provide advice and guidance on the best way to deploy Workbooks for your organisation.

SMALLER PROJECTS

Advisory Packs also work particularly well for smaller projects, enabling you to use one of our consultants for small elements of work, such as report writing or creating custom page layouts.

AVAILABLE PACKS

ADVISORY PACKS	PRICE
8 points (0.5 days)	**£550**
16 points (1 day)	**£950**
32 points (2 days)	**£1,900**
48 points (3 days)	**£2,850**
64 points (4 days)	**£3,800**
80 points (5 days)	**£4,750**

Note: this approach is not available for projects where it is expected that they will require more than 5 days of implementation work.

FAQs

How do I use my Advisory Points?

Once you have purchased your pack, you will be assigned an Implementation Consultant. Your Consultant will discuss your needs and agree how the points will be used.

Do my Advisory Points run out?

Yes, you must use your Advisory Points within 12 months of purchase. They cannot be extended beyond that period.

How much time is a point worth?

A point generally equates to 30 minutes of work.

How do you charge for expenses?

If we have incurred expenses such as travel or accommodation, we will recharge these to you at the end of the month. We will charge you 45 pence per mile for mileage (based on travelling from our offices in Reading), all other expenses will be recharged as cost price.

You also sell Consultancy Days, why wouldn't I just purchase the days I need?

Workbooks offers two approaches; you can purchase Consultancy Days, or you can purchase Advisory Points as part of an Advisory Pack. If you purchase Consultancy Days, these must be used as a whole day. Advisory Points are more flexible, so you can use just the time you need. Consultancy Days work more effectively for longer, more complex projects, Advisory Points work well for small projects where customers need limited help and resources to assist with implementation.

What if I would like Workbooks to do a lot of the implementation work for me?

If you feel that you would like more support or would like Workbooks to take on a larger portion of the implementation work, then we offer a range of implementation options, including shared or supported implementation, that may be more appropriate for your organisation.

Speak to your primary contact at Workbooks for more information on the implementation options available.