Customer SUCCESS PLUS

Introduction

CRM IS A JOURNEY NOT A DESTINATION

Great news - you've got Workbooks deployed...now you need to maximize the return on your investment. This means you need to continue the CRM momentum within your organization, don't let it stagnate because you haven't got time to focus on improvements which can really help drive value.

CONTINUOUS IMPROVEMENT: EVOLUTION NOT REVOLUTION

Often small changes to your CRM system can make a big difference to the value you are receiving. It could be:

• A new report which gives you real insight into your clients;
• Website lead capture;
• Implementing a 'Red/Amber/Green' rating for your clients so you can see which customers are happy or not;
• An automated Workflow, which makes your team much more productive;
• You want to connect Workbooks to another cloud system, like GoToMeeting or Adobe Sign.

Customer
SUCCESS PLUS

The Customer Success Plus Program involves you contracting for a minimum number of consulting days per quarter, at a significantly lower daily rate. In return you get assigned a dedicated consultant who will help you implement a roadmap of improvements to Workbooks.

It could be help with writing reports or maybe your team needs some more training. It could be you need help adopting some new functionality in the product which you just haven't had time to get to grips with, or you need some changes to an automated script. Whatever your needs, we can help you maximize your return on investment in CRM.

CUSTOMER SUCCESS PLUS

➕ STANDARD PROGRAM

- **Account Manager**
- **Periodic Care Calls**
- **Online Resources:**
  – Forums, Knowledge Base, Videos, Webinars
- **Technical Support:**
  – Telephone, Email, Case Portal

➕ DEDICATED CONSULTANT

- **2-6 days consultancy per quarter**
- **On-site account reviews**
- **Reduced consultancy rate**

➕ ONGOING IMPROVEMENTS

- **Configuration, Reporting,**
- **Automation, Training, etc.**

You will contract for between 2 and 6 days of consultancy per quarter. Your dedicated consultant will meet with you (either in person or online), review your current Workbooks deployment and agree with you a roadmap of improvements. We will then implement the improvements within the time available.

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 maintain Workbooks for your organization. You must have at least 2 quarters remaining on your contract to buy Customer Success Plus.
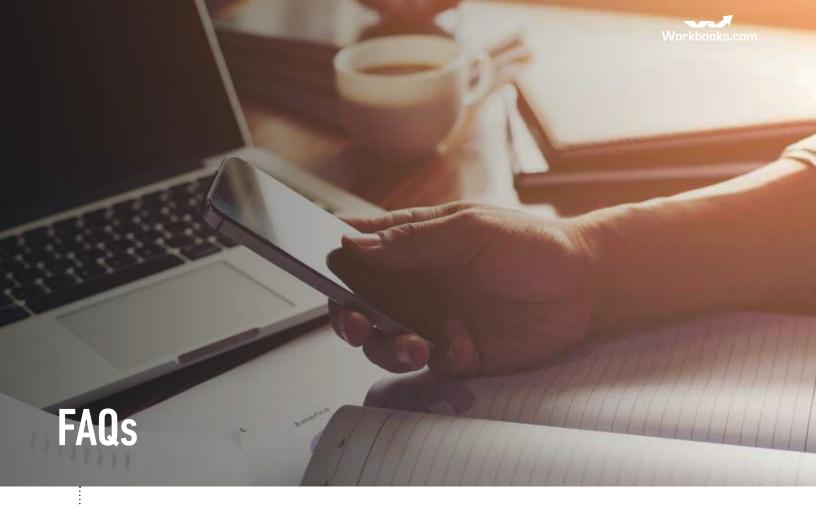
THE
Benefits

You get a dedicated consultant to help ensure your CRM project continues to be successful.

• You have pre-purchased days, no need to raise orders for small bits of work.

• No need to take the time out of your busy day-to-day schedules to keep track of the latest features.

• We will work with you to find out how we can improve your CRM to adapt to the growing needs of your business.

• You can achieve a much better daily rate of $890 per day compared with the standard $1,400 per day.

AVAILABLE PACKS

Customer Success Plus can be bought in the following blocks:

CUSTOMER SUCCESS PLUS	PRICE
2 days per quarter	**$960 per day** ($7,680 per annum)
3 days per quarter	**$960 per day** ($11,520 per annum)
4 days per quarter	**$890 per day** ($14,240 per annum)
5 days per quarter	**$890 per day** ($17,800 per annum)
6 days per quarter	**$890 per day** ($21,360 per annum)

FAQs

Can we roll our days forward into a future quarter if we haven't used them?

Yes, you can roll unused days forward for a maximum of one quarter only. After this quarter any unused days would be lost, so make sure you take advantage of your dedicated consultant.

Can we buy more than 6 days a quarter at this rate?

6 days is the maximum we can offer at the discounted rate. Additional days can be purchased at our standard day rate of $1,400.

What if we use our allotted days within a quarter and need more consultancy time?

You can upgrade to the next level of subscription, or buy more consultancy time at our standard rate of $1,400 a day.

How will this be billed?

In the same way as your contract, typically annually in advance.