

access CRM Services Catalogue



At Access we pride ourselves on the depth and breadth of skills across our 400 certified professional services employees. These Consultants, Programme Managers, Project Managers, Trainers and Solution Architects are here to provide you with the industry expertise and product best practices that help you deploy, adopt, operate and integrate our market leading software applications. Either on-premise, or in the Cloud. Our Professional Services teams help hundreds of customers like you, every week, to improve their productivity, increase their efficiency and ultimately provide them with the freedom to do more.

Day Rate Service options

Service	Description	Customer Outcome	Pricing
Onsite Days Consultancy	Minimum 6.5 hours consultancy per day onsite	Desired outcome agreed by client and consultant ahead of the scheduled day	per day
Remote Days Consultancy	Up to 6.5 hours consultancy per day delivered remotely	Desired outcome agreed by client and consultant ahead of the scheduled day	per day
Remote Consultancy	Up to 3 hours remote consultancy	Desired outcome agreed by client and consultant ahead of the scheduled day	per day
Project Management	Time to manage the timings of the project to provide an update on progress that has been made and ensure everything is on track, delivered remotely.	Professional Project management providing clients to support they require to implement their projects successfully	per day
Solution Architect	Time to create technical solution design and integrations for complex, multi-product, multi-department solutions, delivered onsite	Minimise risk for highly complex, large scale projects	per day

Implementation Services

Service	Description	Customer Outcome	Pricing
<i>Based on our years of software deployment expertise, we have defined our FlightPath methodology for Access CRM. This fixed price, low-risk implementation package standardises your implementation journey based on our best practices and are designed to deliver timely value to you and your colleagues. For more details see www.theaccessgroup.com/flightpath-overviews/</i>			
FlightPath A	Implementation of Access CRM for small to medium customers to help grow sales and deliver efficient customer management.	Included FlightPath Services Configuration Workshop & Workbook, Configuration of up to 50 fields in the standard modules including Accounts, Contacts, Leads & Opportunities, Integration into 1 x financial database displaying Account, Address, Credit Control, Sales Order and Stock data, 3 x 2hr remote Training Sessions, 4hrs User Acceptance Testing issue resolution	Fixed Price
FlightPath B	Implementation of Access CRM for small to medium customers to help grow sales and deliver efficient customer management, run more effective marketing campaigns, utilise forecasting tools to help predict sales and receive further focused training.	Includes all of FlightPath A plus: Configuration of the Campaigns module, Creation of 4 x standard Reports, Creation of 2 x shared Dashboards with up to 5 dashlets, Set up of Forecast module, 1 x 2hr forecast training session (alternative topic can be selected)	Fixed Price
FlightPath C	Implementation of Access CRM for small to medium customers to help grow sales and deliver efficient customer management, run more effective marketing campaigns, utilise forecasting tools to help predict sales, receive further focused training and run more effective marketing campaigns utilising the Communicator email marketing tools	Includes all of FlightPath B plus: Integration and Configuration of Communicator email marketing tool, 4 hour remote training by CommuniGator Branded Template Set up Marketing List Set up in CRM	Fixed Price
Assisted Upgrade	Consultant led upgrades	We will review and address key pain points in your existing CRM. Refactor any customisations at code level into the Business Process Author where possible to ensure your CRM is upgrade safe. Training and Orientation on the new user interface and features of the CRM. Finally, a Consultant will support you in the launch to your stakeholders.	Per Day

Advisory and Adoption Services

Service	Description	Customer Outcome	Pricing
User Training	Basic User Training for end users of the system. To include Logging in, Leads, Contacts, Accounts, Opportunities, and Quotes. Data Cleansing, Import and Merging, delivered remotely	You will be able to confidently manage records within all the main CRM modules you would use in your day-to-day role.	Fixed Price
Studio Training	Training for Studio to allow Administrators to customise the fields and functions of the standard modules, delivered remotely	You will understand how to create and alter the fields and form layouts within the system. This will allow you to add new data points to any module within the CRM and alter the presentation of the data to display it in the most meaningful way to your business	Fixed Price
Admin Training	Training for CRM Administrators. To include managing users, roles and teams, security and system settings, delivered remotely	You will learn how to use the administration tools to effectively manage your user base, including how to create user roles to assign permissions to groups of users rather than individuals. This will help you to manage the data in your CRM and ensure it remains under the control of the business.	Fixed Price
Reports Training	Covers use of the reporting tool in CRM, delivered remotely	This will provide you with the ability to produce reports in tabular and graphical formats allowing you to extra meaningful metrics from the data in your CRM and get the most out of your reporting tools.	Fixed Price
Quote Rebranding	Covers rebranding the quote PDF output with a new logo / text formatting etc (Per Quote), delivered remotely	Delivery of a new quote template which reflects any changes in branding, office location, contact details or any other header and footer information	Fixed Price
Reports Creation	Create a report. Charged per hour with quote provided.	Creation and deliver of a report to your specifications.	T&M
Finance Database Integration	Integration to further Access financial databases to bring all your finance data into one CRM	This will integrate a further financial database into the CRM so that all data is held in one place for your customers	T&M
Quotes	Covers consultation on quote setup, configuration, creation of 1 x Quote template with company logo and standard T&C's, addition of simple 1 stage approval process for Quotes and training for 3 super users (2hrs)	This will enable you to use the quoting tool to create quotes for your customer.	T&M
Quote to Order	Integration with Access finance system to allow for Quotes to converted to Sales Orders	This will enable quotes to be converted into Sales Orders in the CRM and made available in your Access finance system	T&M
New Quote Templates	Create a new quote template. Charged per day with quote provided. Minimum half day charge	Delivery of a new quote template which reflects any changes in branding, office location, contact details or any other header and footer information	T&M
Dashboard Creation	Create user dashboards for Sales Figures and Graphs. Charged per hour with quote provided	Delivery of a new quote template which may add to a bank of different quote templates available.	T&M
Case Management	Create a case management system.	This will enable you to record Customer Service Issues/ Cases against your Accounts for improved case management and reporting.	T&M
Contract Module	Create a contract management system	This will enable you to record all Contracts for Accounts and have visibility and reporting functionality of Contract data.	T&M
Activities (Call, Meetings & Tasks)	Tailored configuration of these activity modules	Ability to tailor Activity modules to suit the way your business works.	T&M
Business Process Author	Create a business process workflow. Charged per hour with quote provided	Provides you with the ability to automate complex business processes.	T&M
New Module Creation	Create and deploy a new module for Access CRM	This will provide you with a tailored module to suit your business requirements related to other modules within the CRM.	T&M
Adoption Review	An onsite review to understand what is and what is not working for your business	This will enable you to determine what are the CRM priorities for your business and plan how to achieve this.	T&M
Data Import	Import data to Access CRM from correctly formatted templates	This enables you to bring further data into your CRM to enhance the data integrated from your financial database.	T&M

Development and Integration Services

Service	Description	Customer Outcome	Pricing
Projects and Project Transactions	Project creation and history with integration to Access FocalPoint / Dimensions / FinOps / Time & Bill		T&M
Multi Database	Integration to further Access financial databases to bring all your finance data into one CRM		T&M
3rd Party SQL Integration	Integrate read only to a third party SQL database and upload the data into Access CRM		T&M
Access Document Management (ADM) Integration	User set up and integration of ADM into Access CRM		T&M
Web to Lead Integration	Integrate your web to lead forms onto your website and provide HTML/CSS which aligns with website layouts		T&M
Primary Contacts	Copy contacts from Access finance system into Access CRM's Contacts		T&M