



thankQ 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
Days Consultancy	Up to 6.5 hours thankQ consultancy per day, delivery methods of remote or on-site agreed ahead of work commencing. For customers looking to understand training, configuration and best practices within their system with the aid of a system expert's knowledge and experience. This could include: <ul style="list-style-type: none"> o Training o Consultancy to add new services/modules o Reporting o Process improvement o Maximising system functionality o Question and answer session (Maximum 6 delegates) 	The customer will receive advice on new features and best practices, as well as resolutions to training and configuration queries that have been reducing efficiency. Key objectives to be provided by the customer in advance.	Per Day*
Remote Consultancy	Up to 3 hours remote thankQ consultancy for customers looking to understand training, configuration and best practices within their system with the aid of a system expert's knowledge and experience. This could include: <ul style="list-style-type: none"> o Training o Consultancy to add new services/modules o Reporting o Process improvement o Maximising system functionality o Question and answer session (Maximum 4 delegates) 	The customer will receive advice on new features and best practices, as well as resolutions to training and configuration queries that have been reducing efficiency. Key objectives to be provided by the customer in advance.	Per 0.5 day
Project Management	Professional project management to manage the key resources, milestones, project plan, risks and issues and change on the thankQ project. To provide an update on progress that has been made and ensure everything is on track as per the project plan.	The client will receive the support and assistance they require to implement their thankQ project successfully.	Per Day

Implementation Services

Service	Description	Customer Outcome	Pricing
FlightPath A for thankQ	A fixed price, low-risk implementation package. Your journey is based on our best practices and is designed to deliver timely value to you and your colleagues. The FlightPath will deliver the core modules for CRM, Finance and Fundraising and comprises of 5 x 1 hour online training sessions with a the project consultant. For more details see www.theaccessgroup.com/flightpath-overviews/	The client will have up to 3 users trained who will be able to use thankQ at a basic level, with a basic configuration based on their requirements. The trained users will be able to manage their contacts within CRM, use the Finance module, manage Fundraising Funders and use the Data Tools.	Fixed Price
FlightPath B for thankQ	A fixed price, low-risk implementation package. Your journey is based on our best practices and is designed to deliver timely value to you and your colleagues. The FlightPath will deliver the core modules for CRM, Finance, Fundraising, Events, Volunteers, JustGiving and comprises of a mix of onsite and remote training with the project consultant. For more details see www.theaccessgroup.com/flightpath-overviews/	The client will have up to 6 users trained who will be able to use thankQ at an intermediate level, with standard configuration. The trained users will be able to manage their contacts within the CRM, use the finance module, manage Events and Fundraising funders, populate simple volunteers data, manage JustGiving and use the Data Tools.	Fixed Price
thankQ Installation	Installation of the thankQ system to either a hosted or on premise environment.	The client will have an installed version of the thankQ system on one environment.	Per Day
Creation of Additional Environments	Creation of an additional environment as a copy of LIVE or TEST data. This will then provide the client with an additional system to work with (DEV/TEST).	The client can have an additional installed version of the thankQ system for Testing / Development.	Per Day
Custom Implementation	Based on your specific solution needs we will jointly create an agreed Confirmation of requirement to scope your implementation and associated training needs.	The client will have users trained who will be able to use thankQ at a comprehensive level, with a configuration based on their requirements. The trained users will be able to use all modules purchased as per the customised training programme.	Per Day
UAT Testing Assistance	Assistance in User Acceptance Test planning and testing approach, with advice on UAT Test Script creation.	The client will be able to produce a User Acceptance Test plan with associated test scripts as per the Confirmation of Requirements.	Per Day
FlightPath Upgrade	Simple thankQ upgrade for customer implementations with minimal Data and Configuration, with a standard approach. The client's system will require an assessment as to whether this type of upgrade is suitable for their configuration. (Version 8 only)	Upgrade from a previous thankQ version to the current thankQ CRM (10), to allow Fundraising customers to achieve business continuity.	Fixed Price
Upgrade services to new Version (Medium Level)	thankQ upgrade for customer implementations with larger Data volumes and/or specific configuration. (Version 8 only)	Upgrade from previous thankQ version to the current thankQ CRM (10), to allow Fundraising customers to achieve business continuity.	Per Day
Migration to Hosted environment	Migration of current thankQ system from On Premise environment to our Hosted platform. (thankQ CRM only)	The client has a serviced environment within the Access Hosted platform.	Per Day
Data Migration Service	Importing of data from 3rd party systems into thankQ. The approach may be a managed service or Data Assistance or a combination of both which will determine the effort required.	The client receives automation of Data import into thankQ.	Per Day

Advisory and Adoption Services

Service	Description	Customer Outcome	Pricing
Standard User Training	Classroom style training delivered either remotely using Microsoft Teams or (if appropriate) at the client site, where an experienced trainer will deliver standard training on any thankQ module, with up to 6 staff. Standard course designs available on request.	The trainee will be able to use the thankQ module functionality as described in the course description.	Per Day*
UAT Training Workshops	Training to support the client in project User Acceptance Testing, aimed at the project team or super users who have been involved in the project specification. Provided as structured remote delivery, with testing staff attending. Options include a single instance, 2 workshops (one at the start of UAT and one towards the end of UAT) or monthly UAT workshops throughout the duration of the UAT period.	The trainee will be able to understand how to navigate thankQ in order to check data and functionality as the UAT testing approach. This will enable the UAT testing team to fully test all areas of the system UAT sign off and Go Live readiness.	Per Day

UAT Support	Remote sessions for assessing the UAT items logged and consulting on best practice for logging cases in order for the projects team to help in the most efficient manner.	The client will acquire full understanding of how to effectively log cases for the most efficient resolution, ensuring prioritisation is maintained within the project.	Per 0.5 day
New Starter Training	Training for new users on thankQ CRM. Training can be carried out remotely or on site and tailored to suit from a suggested list of topics	Training on specific modules using your database and run at your pace.	Per 0.5 day
Refresher Training	Training for users on thankQ CRM who wish to receive additional refresher training, having previously attended training. Training can be carried out remotely or on site and tailored to suit from a suggested list of topics	Training on specific modules using your database and run at your pace.	Per 0.5 day
Webinar Training	A remote webinar, priced per delegate, where a consultant will discuss and give an interactive demonstration of a pre-determined area of the system.	The trainee will gain an understanding of the topic covered to apply to their day to day thankQ use.	Per delegate
Administrator Training	Training on the Administration functions available in thankQ, recommended for Super Users, the local Administrator or CRM Manager. A consultant can provide either a remote demonstration (0.5 day) or can spend a full day session to run the demonstration and then assist you in applying this to your business scenarios.	The trainee will be able to perform system administration (accounts and settings) including all the high level module functions as well as the more advanced system tools.	Per Day
Advanced Reporting Training	Training on the Advanced Reporting functions available in thankQ. A consultant can provide either a remote demonstration (0.5 day) or can spend a full day session to run the demonstration and then assist you in applying this to your business scenarios.	The trainee will build upon their knowledge and gain a comprehensive understanding of the advanced reporting capabilities.	Per Day
In App Configurator Training	A consultant can provide either a remote demonstration (0.5 day) of the tool or can spend a full day session to run the demonstration and then assist you in applying this to your business scenarios.	The trainee will gain a good understanding of the In App Configurator options in thankQ.	Per Day
New Features Assistance	Following an upgrade you will learn about new features added to the system. This session is designed to provide an understanding the best method of implementing them. (thankQ CRM only)	Moving the system to use the new standard functionality as much as possible and maximise use of the standard software features.	Per Day
JustGiving integration Training	A consultant will deliver a remote demonstration of JustGiving integration touchpoints that are available as standard in thankQ (0.5 day).	The trainee will gain an understanding of the JustGiving integration within thankQ.	Per 0.5 day
MailChimp integration Training	A consultant will deliver a remote demonstration of Mailchimp integration touchpoints that are available as standard in thankQ (0.5 day).	The trainee will gain an understanding of the Mailchimp integration within thankQ.	Per 0.5 day
Integration to 3rd Party Applications Assistance	A consultant will spend a day with you discussing your 3rd party data sources and discuss ways to apply to current business scenarios. This could include creating a solution design for specific bespoke import configurations that can be built for you separately by Access (See Development and Integration Services).	The trainee will gain an understanding of the integration touchpoints available in standard that they use and how they work. If necessary, the trainee will receive a solution design for bespoke configuration possibilities.	Per Day
Data Integrity Assistance	A consultant will assess the integrity of your data and provide a comprehensive report of their findings, with recommendations for data cleansing.	The client will gain an understanding of the current state of their data. Recommendations will be provided around duplicate records, poor lookup management, out of date data and bad data practice.	Per 0.5 day
Data Cleansing/Archiving	As per the results of Data Integrity Assistance (see above), a consultant will cleanse/archive data based upon a specification determined by the client or agreed in the data integrity assistance session.	Data will be cleansed/archived by a consultant as specified, resulting in a cleaner data set.	Per Day
Contact Deduplication	A consultant will dedupe contact records for the client based on a predetermined rule set.	Duplicate records will be merged in bulk by a consultant, resulting in a cleaner data set.	Per Day
Web API Services	Provide guidance and assistance on how to import / retrieve data into thankQ from: o Your website o Third party applications Provide an accreditation of your website to ensure that data is being transferred into thankQ correctly	The client is able to use the Web API to import data from a third party application and check to ensure their website is integrating into thankQ correctly.	Per Day
Server Move	Remote activities required to complete full database server move with Access carrying out the database migration (assumes SQL Server is configured by customers IT).	thankQ running successfully in the new environment with all links (e.g. web integration) working as before.	Per Day
Server Move IT Assistance	Remote activities required to complete database server move with Customers IT carrying out the SQL Server database migration.	New release of thankQ using the database in the new environment.	Per 0.5 day
Go Live Sign off Review	Ahead of Go Live, a consultant will spend the day on site with the client assisting with the relevant UAT checks required for their project.	This will give the client confidence that they are ready to go live, or if we believe they require more time the consultant will be able to advise on best next steps.	Per Day

Mission Critical Services

Service	Description	Customer Outcome	Pricing
Backup/restore strategy review	An audit to review the physical backup and ability to restore those backups in the event of a system failure, failed upgrade, database corruption, or cyber attack.	Minimise the risk of one losing access or historical data of one of your core business applications.	Per Day
Disaster Recovery review	This more comprehensive service incorporates a review of your backup and restore strategy, but extends to review system interdependencies such as 3rd party links and review your strategies for auto-failover.	Minimise the risk of one losing access or historical data of one of your core business applications and ensure any investments in disaster recovery are maximised.	Fixed Price
Data Restoration Service and Disaster recovery	Restore Database backup for the client, assuming DR strategy in place and data is available.	Full Data restoration and recovery of the client's system.	Per Day
Data Assessment and Purging	Assessment of requirements, to review, plan and execute a Data Purging exercise.	Full Data purging of client data as per the scope of the requirements.	Per Day

Development and Integration Services

Service	Description	Customer Outcome	Pricing
Integration to 3rd Party applications	A consultant will create a bespoke import template specific to the 3rd party data specification of requirements for import. This specification may be a result of integration consultancy or could be a specification outlined by the client.	Client receives 3rd party integration template which can be used to import data requirements as per the specification.	Per Day
Customised reporting	Creation of thankQ report as per agreed customer specification. Discussion on requirement and delivery of report.	Client receives the required report as per the agreed customer specification.	Per Day
Bespoke features/User Interface	Creation of thankQ bespoke features as per agreed customer specification. Discussion on requirement and delivery of bespoke features including: o Add new fields o Create new forms o Create new entities o New Rest API resources	Client receives the required bespoke feature as per the agreed customer specification.	Per Day

