

## Service Overview

# FlightPath Destination: EMCOM Migration to Access CRM

Together we'll get you to your new way of working



## Your **FlightPath** journey

We believe wholeheartedly that cloud transformation is a critical foundation for business continuity and growth. Our FlightPath Destination packaged services are key for our customers to continue to get the best from their chosen software and our upgrade, hosting and cloud transition options offer a robust platform for our customers with a cloud computing strategy. This is why we have invested in simplifying and improving our FlightPath Destination services, so you can get full value from your ongoing investment in Access.

We also know that you may view a transformation process with some trepidation and many customers can find this period daunting. In fact for some customers, this may be the first transformation process they have managed.

We recognise this and we have designed our services to help ensure you have a great experience and are looked after along the way, so that the whole process is less daunting... this is our FlightPath Destinations approach.

In this Service Overview we explain your options and what is contained within the different FlightPath Packages so we can make sure your journey to the Access Cloud environment is as seamless as possible.

## Seamless transformation, delivered 100% remotely

Our FlightPath services have been designed to be remote-first, providing you with an improved low-risk journey, no matter how your organisation is structured or wherever your employees are working.

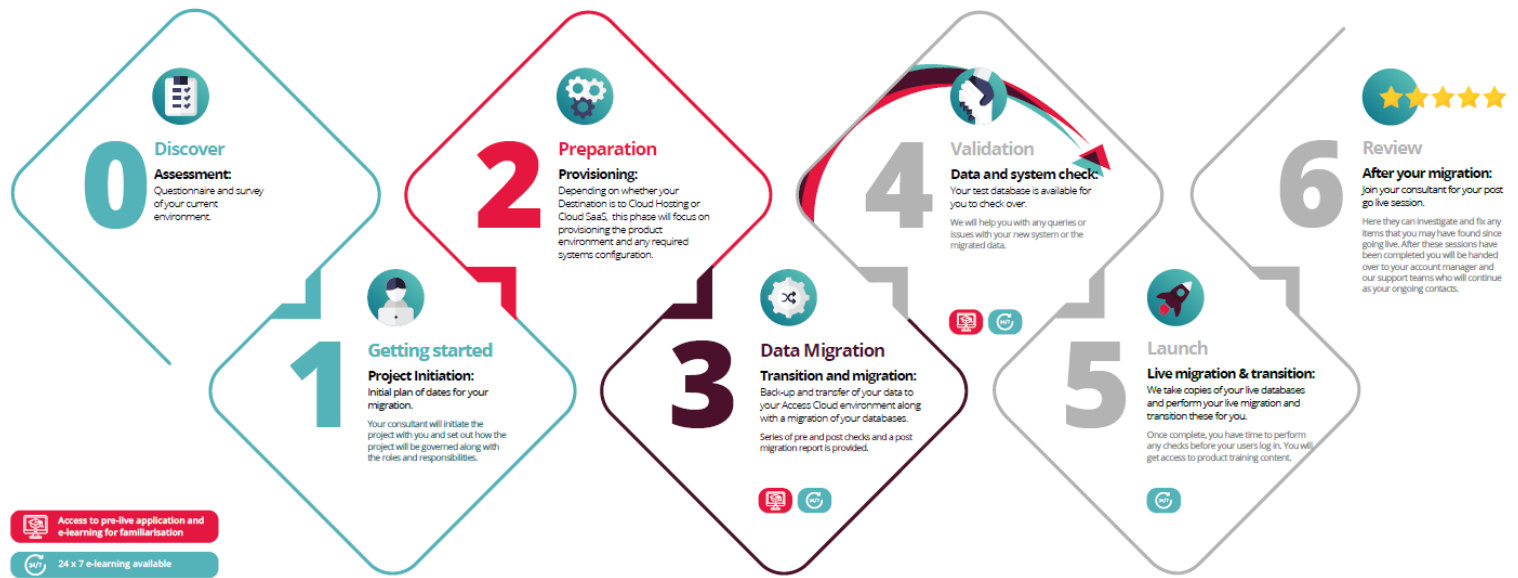
We use video technology to facilitate face to face contact, so you still get the hands-on benefit of working with an Access expert and our years of software deployment expertise. We have also invested in product e-learning, so your users can keep up to date with our products at their own pace.



***Our Flightpath was top notch, our expectations set at the beginning of the project were met and we felt well supported // throughout.***

## FlightPath Destination your six-stage journey to success

We'll be sending you regular updates to keep you on track and ensure it is clear where you are on the journey - every step of the way.



## You have control, but we are never far from your side.

Each FlightPath programme from Access follows a well-defined journey with key milestones. These milestones represent – at a high level – the individual phases of your FlightPath Destination journey. We'll be using these milestones to help us both track and communicate progress towards successfully launching to your users. Our aim is to give you value from your investment as quickly and as fully as possible. Using our years of software deployment expertise, we have defined the FlightPath methodology. This is a journey based on best practice and designed to deliver timely value to you and your colleagues. And while it is ultimately your journey, we are here to support you all along the way.

## Clear roles and responsibilities

At the 'Getting Started' milestone phase, you will receive a Welcome Pack. In here you'll find clarity on roles and responsibilities during the Destination process. It will define what you'll need to do, and what we will do. Crucially our FlightPath approach also clarifies our joint expectations, helping us both understand the process that we will jointly commit to, in order to successfully transition your software to your end-users in a timely and efficient manner.

## Your onward journey

Even when your Destination has successfully landed, and you are in a position to go live, we will ensure that you are successfully transitioned to the care of our Success Team.

The Success Teams include our support colleagues and Customer Success Managers and will be available to support you as you use your Destination software and continue to realise the benefits of your investment in your Access solution.

To ensure The Access Group can continue to support all our products, we have made sure 100% of our support teams can work securely and seamlessly from home. We have increased the capacity of our telephone system so support teams can be contacted wherever they are working using our usual support phone numbers.

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***It was the best experience I ever had; I can't thank the Access team enough. The whole thing was pretty smooth.***

***We transitioned during a lockdown and all working from home. Everything was done over teams calls which went really well considering the circumstance***  
***Kevin Lin, Finance Director.***

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## FlightPath for EMCOM Migration to Access CRM

The tables below summarise what's included within the FlightPath packages. We will help you choose the package that's right for you but please review this table to ensure your understanding.

FlightPath A	FlightPath B	FlightPath C
<p><b>Overview</b></p> <p>Implementation of Access EMCOM Migration into Access CRM at a cost-effective price</p>	<p><b>Overview</b></p> <p>Implementation of Access EMCOM Migration into Access CRM for customers looking FOR a solution with several modules</p>	<p><b>Overview</b></p> <p>Implementation of Access EMCOM Migration into Access CRM for customers wanting all available modules</p>
<p><b>Key FlightPath Content:</b></p> <p>This includes the completion of your <b>EMCOM Migration via Data transfer</b></p> <p>It also includes on-boarding of the following modules:</p> <p>The <i>Membership Module</i> which includes; Contact details Contact preferences Member profiling</p> <p>The <i>Shares Module</i> which includes; Share account transactions Interest calculations</p>	<p><b>Key FlightPath Content:</b></p> <p>This includes the completion of your <b>EMCOM Migration via Data transfer</b></p> <p>It includes on-boarding of <b>BOTH</b> of the following modules:</p> <p>The <i>Membership Module</i> which includes; Contact details Contact preferences Member profiling</p> <p>The <i>Shares Module</i> which includes; Share account transactions Interest calculations</p> <p>It also includes on-boarding of <b>ONE</b> of the following modules:</p> <p>The <i>Dividends Module</i> which includes; Dividend account transactions Share of the profits calculations</p> <p>The <i>Share Bonds Module</i> which includes; Share bond transactions Interest calculations</p>	<p><b>Key FlightPath Content:</b></p> <p>This includes the completion of your <b>EMCOM Migration via Data transfer</b></p> <p>It includes on-boarding of <b>ALL</b> of the following modules:</p> <p>The <i>Membership Module</i> which includes; Contact details Contact preferences Member profiling</p> <p>The <i>Shares Module</i> which includes; Share account transactions Interest calculations</p> <p>The <i>Dividends Module</i> which includes; Dividend account transactions Share of the profits calculations</p> <p>The <i>Share Bonds Module</i> which includes; Share bond transactions Interest calculations</p>
<p><b>Included FlightPath Services</b></p> <p>Key services delivered include Welcome Call, Installation of your solution, Data Extraction, Data Migration, Remote Training Session 1, Data Review Check-in, Remote Training Sessions 2 &amp; 3, Data Check-in &amp; Sign-Off, Live Data Import, Go-Live Call, Post Go-Live Support, Handover to Support</p>	<p><b>Included FlightPath Services</b></p> <p>Key services delivered include Welcome Call, Installation of your solution, Data Extraction, Data Migration, Remote Training Session 1, Data Review Check-in, Remote Training Sessions 2 &amp; 3, Dividends OR Share Bonds Training, Data Check-in &amp; Sign-Off, Live Data Import, Go-Live Call, Post Go-Live Support, Handover to Support</p>	<p><b>Included FlightPath Services</b></p> <p>Key services delivered include Welcome Call, Installation of your solution, Data Extraction, Data Migration, Remote Training Session 1, Data Review Check-in, Remote Training Sessions 2 &amp; 3, Dividends &amp; Share Bonds Training, Data Check-in &amp; Sign-Off, Live Data Import, Go-Live Call, Post Go-Live Support, Handover to Support</p>
<p><b>Additional Services available</b></p> <p>Additional remote user training Integration to additional financial databases Data Migration Other Module configuration, e.g. Quotes</p>	<p><b>Additional Services available</b></p> <p>Additional remote user training Integration to additional financial databases Data Migration Other Module configuration, e.g. Quotes</p>	<p><b>Additional Services available</b></p> <p>Additional remote user training Integration to additional financial databases Data Migration Other Module configuration, e.g. Quotes</p>

## Product features enabled per FlightPath package for EMCOM Migration to Access CRM

Feature	Summary	FlightPath A	FlightPath B	FlightPath C
<b>User Management</b>	Manage Your system Users within your system	●	●	●
<b>Reporting/Dashboard Templates</b>	Using our templates, create reports and dashboards in Access to give you real-time insight into your key metrics	●	●	●
<b>Role Management</b>	Clearly define User Roles within your system	●	●	●
<b>Automated Workflow</b>	Allows automatic emails or field updates to happen when criteria is met. This can be used to incorporating approval processes on records	●	●	●
<b>Studio</b>	Allow Administrators to edit the fields and functions of the standard modules	●	●	●
<b>Campaigns</b>	Manage members through Campaigns	●	●	●
<b>Web Lead Forms</b>	We provides a simple way to allow visitors to your website or other online location to become leads in your solution	●	●	●
<b>Online Portal</b>	Our online portal is designed to offer users an assortment of the most used types of information and services	●	●	●
<b>Activity Logging</b>	Manage customer interactions using our Calls, Tasks, Emails and Meeting records	●	●	●
<b>Outlook Email Integration</b>	Seamlessly integrate to MS Outlook to view Access CRM data in Outlook	●	●	●
<b>EMCOM Membership Module</b>	Record and store members personal data (Names addresses etc.)	●	●	●
<b>EMCOM Shares Module</b>	Record, process and store members share account records (financial transactions) & apply interest	●	●	●
<b>EMCOM Dividends Module</b>	Produce membership dividend cards to scan at store tills, award member points for spending in stores & Convert points to monetary value annually as a payout reward.		○	●
<b>EMCOM Share Bonds Module</b>	Record, process and store members bond account records (financial transactions) Investments held for a fixed term with an interest value applied on redemption		○	●

Implementation Services included in FlightPath				
		FlightPath A	FlightPath B	FlightPath C
<b>Welcome Call</b>	Your on-boarder will contact you to familiarise you with the journey with Access EMCOM Migration to Access CRM and scope your requirements	●	●	●
<b>Installation of your solution</b>	We will install and deploy the EMCOM base system	●	●	●
<b>Install of DataHub Adapter</b>	We will install our DataHub adapter onto your system in order to send the data ready for migration	●	●	●
<b>EMCOM Data Migration</b>	Our technical team will import your data into your new system	●	●	●
<b>Remote Training Session 1 –</b>	Your On-Boarder will complete this remote training session with you	●	●	●
<b>Data Review Check In</b>	We will complete a data check with you to ensure that you are happy with your data	●	●	●
<b>Remote Training Session 2 –</b>	Your On-Boarder will complete this remote training session with you	●	●	●
<b>Remote Training Session 3 -</b>	Your On-Boarder will complete this remote training session with you	●	●	●
<b>Dividends Module Training</b>	Your On-Boarder will complete this remote training session with you		○	●
<b>Share Bonds Module Training</b>	Your On-Boarder will complete this remote training session with you		○	●
<b>Data Check-In &amp; Sign-Off</b>	We will complete a UAT check- in with you	●	●	●
<b>Live Data Import</b>	We will complete your live data import into your new system	●	●	●
<b>Go Live Call</b>	Once you had had some time to get to grips with your system, you will have a go-live call with your consultant	●	●	●
<b>Post Go-Live Support</b>	2 weeks after your Go-Live call we will complete a post go-live support session with you to ensure that you are happy with the system	●	●	●
<b>Handover to Support</b>	You will receive a Handover to Support in line with your Customer Success Plan	●	●	●



## Addition Services available for EMCOM Migration to Access CRM

<b>User Training</b>	Basic User Training for end users of the system. To include Logging in, Leads, Contacts, Accounts, Opportunities, and Quotes. Data Cleansing, Import and Merging.
<b>Upgrade Support</b>	We will support in your upgrade process including UAT
<b>Studio Training</b>	Training for Studio to allow Administrators to customise the fields and functions of the standard modules
<b>Admin Training</b>	Training for Access CRM Administrators. To include managing users, roles and teams, security and system settings
<b>Reports Training</b>	Covers use of the reporting tool in Access CRM.
<b>Reports Creation</b>	Create a report. Charged per hour with quote provided using our Sales Catalogue
<b>Finance Database Integration</b>	Integration to further Access financial databases to bring all your finance data into one CRM
<b>Quotes</b>	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)
<b>Quote to Order</b>	Integration with Access finance system to allow for Quotes to converted to Sales Orders
<b>Quote Rebranding</b>	Covers rebranding the quote PDF output with a new logo / text formatting etc.
<b>New Quote Templates</b>	Create a new quote template. Charged per day with quote provided. Minimum half day charge
<b>Case Management</b>	Create a case management system.
<b>Contract Module</b>	Create a contract management system
<b>Activities (Call, Meetings &amp; Tasks)</b>	Tailored configuration of these activity modules
<b>Access Document Management (ADM) Integration</b>	User set up and integration of ADM into Access CRM
<b>Projects and Project Transactions</b>	Project creation and history with integration to Access FocalPoint / Dimensions / FinOps / Time & Bill
<b>Business Process Author</b>	Create a business process workflow. Charged per hour with quote provided
<b>Multi Database</b>	Integration to multiple Access finance databases
<b>Primary Contacts</b>	Copy contacts from Access finance system into Access CRM's Contacts
<b>Web to Lead Integration</b>	Integrate your web to lead forms onto your website and provide HTML/CSS which aligns with website layouts
<b>New Module Creation</b>	Create and deploy a new module for Access CRM
<b>3rd Party SQL Integration</b>	Integrate read only to a third party SQL database and upload the data into Access CRM
<b>Adoption Review</b>	An onsite review to understand what is and what is not working for your business
<b>Data Import</b>	Import data to Access CRM from correctly formatted templates

On top of the services included within the standard FlightPath packages, the table below highlights the additional value-added services that our consulting teams can provide, **depending on the Flightpath Package you have purchased**. Please take some time to review these.





## About The Access Group:

The Access Group has been recognised in The Sunday Times Tech Track 100 in 2019 and is a leading provider of business software to mid-sized UK organisations. It helps more than 32,000 customers across commercial and not-for-profit sectors become more productive and efficient. Its innovative Access Workspace cloud platform transforms the way business software is used, giving every employee the freedom to do more.

Established in 1991, The Access Group, with an enterprise valuation of over £1billion, employs more than 2,300 staff.

For more information about The Access Group, visit: [www.theaccessgroup.com](http://www.theaccessgroup.com)

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