Pipeliner

Pipeliner CRM
SPECIALIST SUPPORT

Service Packages

SCOPE OF WORK

Overview

The Pipeliner "**Specialist Support**" packages are aimed at Pipeliner *Admins/Business* Leaders who have a clear idea of what they'd like to achieve for their business using Pipeliner and who know how to implement those ideas but who simply lack the time or other resources to do so. These can stretch from standard Admin tasks - such as making sure that when a user leaves, their data is managed and reallocated in a timely manner – to Advanced Admin – for instance, creating new reports or automated processes to your detailed specifications.

All our customers want to get the most from their investment in Pipeliner but sometimes, conflicting priorities can mean that desired improvements are not implemented. These are the customers we're aiming to help by offering an "outsourced" Pipeliner Specialist – a fully trained Admin ready to put your ideas into practice.

Pipeliner *Specialist Support*, Silver Package

As part of our Pipeliner *Specialist Support*, Silver Package, your Pipeliner Specialist will spend a maximum of 2 hours per month working on your Pipeliner space to:

- ✓ Maintain your user roles and sales units
- ✓ Invite new users, deactivate or reassign ex-users
- ✓ Manage data updates to your Accounts, Contacts, Leads and Opportunities to reassign to new Owners when users leave or territories change
- ✓ Carry out a quarterly review of your Pipeline processes and help streamline and enhance them with your input
- ✓ Audit your custom fields
- ✓ Identify fields that are not being used and can be removed or replaced
- ✓ Rectify issues with fields names vs labels to improve reporting and filtering
- ✓ Add new fields and update lists and values for existing ones
- ✓ Optimise Form layouts and Interface selections

Pipeliner *Specialist Support*, Gold Package

As part of the Pipeliner *Specialist Support*, Gold Package, your Pipeliner Specialist will spend a maximum of 5 hours per month working on your Pipeliner space and, in addition to the elements of the Silver Package, will also include:

- ✓ Ongoing review and audit of your reports
- ✓ Assistance with building new reports
- ✓ Assistance with building dashboards and charts
- ✓ Set up sharing and scheduling of reports
- ✓ A custom user activity report sent by us to your nominated Admins on a monthly basis to show usage levels and which integrations are active
- ✓ Assistance with updating existing Automatizer processes
- ✓ Creating and implementing new Automatizer processes
- ✓ Reviewing Automatizer logs to identify and resolve any issues

Pipeliner *Specialist Support*, Platinum Package

As part of the Pipeliner *Specialist Support*, Platinum Package, your Pipeliner Specialist will spend a maximum of 8 hours per month working on your Pipeliner space and, **in addition to the elements of the Gold and Silvers packages, will also include**:

- ✓ Assistance with creation and management of Approvals Processes
- ✓ Creation of email templates including sharing with the right users
- ✓ Implementation of Email Sequences
- ✓ Guidance and advice on implementing Online Forms
- ✓ Assistance with using Pipeliner add-ons and integrations in the Automation Hub

We still need to decide about:

- ? A dedicated support telephone number to be used for system down or business critical issues within specified hours *(will need to purchase cheap company mobile phones for the support team for this if we choose to add this option)*
- ? Guaranteed first response time of no more than 1 hour for logged tickets or chats *(during business hours)*

What's Not Included in these *Specialist Support* Packages?

These packages are aimed at those business leaders who know what they want to achieve but lack the time to implement their ideas themselves. In the light of that aim, these packages do not include:

- ✘ Consulting time to work through requirements and guidance/advice on an approach to a business need
- ✘ Requirements gathering and specifications
- ✘ Data Import *(though some advice on data preparation will be offered)*
- ✘ Training *(separate training packages can be offered)*

NOTE: We offer a comprehensive set of implementation packages for those who need consultancy time and guidance.

Pipeliner's Commitment to You

Our Pipeliner Specialists will act as your Pipeliner Admin and will work to your detailed specifications to enhance your data quality, processes and configuration on an ongoing regular basis.

All *Specialist Support* tasks will be logged and details will be sent in a scheduled monthly report.

Your responsibilities

We will rely on you to:

- Provide written, detailed specifications and instructions for your Pipeliner Specialist
- Ensure that the scope of your requests is fully covered by your chosen support package
- Understand that consultancy services and general guidance/advice are not included in support packages
- Proactively request all support services – Pipeliner will not be responsible for ensuring that you use all the time available to you within your chosen package
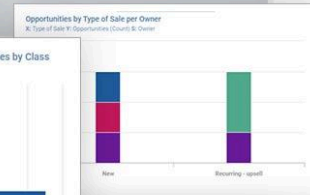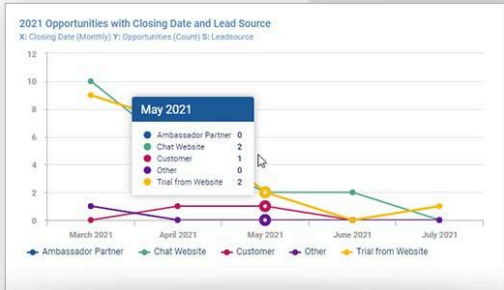
Pipeliner CRM

Exceptional Engagement

The Better CRM › Built for Sales, Used by Sales!

The Pipeliner Universe — Sales Enablement, Knowledge, Networking

Pipeliner CRM
pipelinersales.com

Sales POP!
salespop.net

Go Ahead!
go-ahead.global