

Standard Services



consultation
manager

Consultation Manager strives to deliver an excellent standard of service to all of our clients.

Contact our friendly team at
customersuccess@consultationmanager.com
or call 1300 850 058 (AU) or +61 7 3171 2299 (International)

	Standard Inclusions <i>Up to 2,000 records</i>	Silver Inclusions <i>Up to 6,000 records</i>	Gold Inclusions <i>Up to 70,000 records</i>	Platinum Inclusions <i>80,000 records & above</i>
Unlimited support	✓	✓	✓	✓
Standard onboarding	✓	✓	✓	✓
User Guides	✓	✓	✓	✓
Data protocol example document	✓	✓	✓	✓
Access to online support collateral	✓	✓	✓	✓
Standard system customisations	✓	✓	✓	✓
Standard integrations <i>SPP, Mailchimp, SSO</i>	✓	✓	✓	✓
Dedicated account manager		✓	✓	✓
2 hour training session		✓ 1 Annually	✓ 2 Annually	✓ 4 Annually
Framework review			✓ 1 Annually	✓ 1 Annually
Data quality review			✓ 1 Annually	✓ 1 Annually
CM Accreditation				✓ 3 Annually

ALL PLANS

Unlimited Support

Consultation Manager offers unlimited free support to each and every client. From a smooth setup process to ongoing technical support and system advice, we'll empower you to track your engagement effectively.

Our support inclusions are:

- Onboarding your team to ensure use of the system is efficient and effective
- Unlimited phone, email and chat support through business hours
- An extensive knowledgebase providing details on all of our features

ALL PLANS

Onboarding

System Plan

- ☐ Account manager through onboarding
- ☐ Go-Live date
- ☐ Identify key Users
- ☐ System configuration document
- ☐ Data Protocols example document
- ☐ 1hr system configuration consult
- ☐ Data import/migration plan

System Deploy

- ☐ Framework build
- ☐ Data importing
- ☐ Key Contact access
- ☐ Invoicing

User Training

- ☐ General user access
- ☐ General user training
- ☐ Enterprise Administrator and Power User training

ALL PLANS

CM4 Setup Customisations

Consultation Manager is an incredibly flexible tool allowing you to customise your system to suit your needs. Personalising data fields allows you to track all different aspects of your engagement.

SILVER GOLD

PLATINUM

Dedicated Account Manager

Your dedicated account manager will be available for you to contact directly for system help and advice. They will also proactively make sure that you're getting the best value out of your Consultation Manager platform.

PLATINUM

Training

STANDARD

Standard onboarding training session.

SILVER

1 free session per financial year + onboarding training.

GOLD

2 free sessions per financial year + onboarding training.

PLATINUM

4 free sessions per financial year + onboarding training.

Database Report

Platinum level customers receive an annual database quality report to identify potential opportunities to improve your data quality.

The report identifies duplicates, system configuration recommendations, inactive projects, active/inactive users, and aims to empower you to improve the quality of your data and your reporting.

Contact our friendly team with any questions.

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