

BETACH SOLUTIONS

MARKETING EXPRESS™ CHECKLIST

1 Does your marketing team use a CRM system?

Yes

No

If yes, what system are you currently using? _____

3 Which optional capabilities address your current challenges?

Sales Express

Customer portal

2 Which included capabilities address your current challenges?

Insights dashboard

CRM Customer journeys Segmentation

Email designer

Pre-made templates

Social-post calendar

Event management portal

Lead scoring

Marketing forms Website analytics

LinkedIn campaign manager

4 Which extensions will add the most value for you?

Social HP

Configuration of social channels

Microsoft Power Virtual Agents

Graphic design services

Content services

5 Select the package that suits your needs:

FOUNDATIONS

Starting at \$7,500

SUPPORT SERVICES

Support & Secure

- Standard training plan - **8hrs**
 - Onboarding training
- Condensed business process review
- Post go-live end user support
- Post go-live solution refinement

Ongoing Support

- New release training
- System administration
- User management

Further customizations and support can be added on for additional costs

ENHANCED

Starting at \$11,500

- Newsletter template setup
- LinkedIn campaign setup
- Customer journey architecture
- Website integration
- Custom reports & dashboards
- Event setup
- Event portal customizations
- Power BI workshop

SUPPORT SERVICES

Support & Secure

- Foundation+
- Enhanced training plan - **16hrs**

Ongoing Support

- Foundation+
 - Quarterly custom check-ins
 - System administration