YOUR GUIDE TO
TEKSTACK SERVICES

This guide lists the professional services packages that TekStack provides to customers.

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INTRODUCTION

In a perfect world, your company could just install and get immediate benefit from your subscription to TekStack. However, we are dealing with an important system that integrates processes that cut right across departments. Things like business processes, user training, and data quality always stand in the way of the goal of achieving operational effectiveness.

TekStack wants to provide our customers with a white glove level of service. We want to avoid the experiences we have had in the past implementing these types of tools.

We want to give our customers the fastest path to value, for as little time and money investment as possible. The vast majority of our projects are fixed price for defined scope. This mitigates project risks for our customers.

We provide customers with two different package levels; Essentials and Premium. This helps cater to a customer's budget constraints. If you want us to take on additional work like data migration, integration, or other customizations, we can also provide those services to your business.

Our company is very passionate about the B2B technology industry. Its all we do and as a result we have spent thousands of hours thinking through the best business process for each area of your business. We want to impart that thinking into our service packages.

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ENVIRONMENT SETUP

TekStack is a SaaS product but is unique from other CRM products like Salesforce or HubSpot. As a Microsoft Power App, we deploy our application into your Microsoft tenant. You actually need to invite us into your tenant for us to setup the tool.

Packages	Essentials	Premium
One-time Fees	**$1,000**	**$2,500**
Environments	• Create 1 environment for Production	• Create 1 Production, 1 Test, and 1 Dev environment • Application Lifecycle Management for deployment from dev to test to production
Power BI	• Setup 1 Power BI workspace and deploy Power BI Reports	• Setup 2 Power BI workspaces and deploy Power BI Reports
Teams & SharePoint	• Configure SharePoint & Teams integration	• Configure SharePoint & Teams integration • Setup 1 SharePoint site, Team and OneNote, or link to an existing site and Team, for each customer
Outlook	• Configure Outlook integration	• Configure Outlook integration
User Configuration	• Setup one PowerApp user, you do the rest.	• Setup all users and assign appropriate roles.
Environment Configuration	• Configure settings to get you started.	• Configure settings to get you started.

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SALES CONFIGURATION

TekStack's Sales module includes basic functionality like managing accounts and contacts. But it also includes more advanced functionality like Outbound Sequences for prospecting, and Opportunity Tracking.

Packages	Essentials	Premium
One-time Fees	$3,700	$8,900
Configuration & Rules	• Setup 2 products, as examples, to calculate Opportunity values • Setup 1 outbound sequence as an example	• Setup 5 products to calculate Opportunity values • Setup 2 outbound sequences as examples
Website Form Integration	• Not included	• Wordpress Gravity Forms configured for 2 forms*
Data Load	• Provide Excel templates and 2 hours of assistance to load products, accounts, contacts, and open opportunity records (summary values only, no products)	• Provide Excel templates and 5 hours of assistance to load products, accounts, contacts, and opportunities with optional: 　○ historic opportunity data 　○ opportunity products on open opportunities
Modifications	• One 1-hour requirements session • Up to 5 hours of customizations 　○ Add, remove and/or reorganize fields on forms, views, and dashboards 　○ Insert logos on document templates**	• Two 1-hour requirements gathering sessions • Up to 10 hours of customizations 　○ Add, remove fields on forms, views, and dashboards 　○ Custom tables 　○ Security roles 　○ Modify process, form and/or system logic 　○ Custom notifications 　○ Modify Order and Quote documents** 　○ Custom email templates

CONTINUED

Project Governance	• Kick off meeting • Bi-weekly status report	• Kick off meeting • Weekly status meeting • Monthly Steering Meeting
Training	• Self-Directed Learning • One 1-hour Q&A session	• Self-Directed Learning • Two 2-hour train the trainer session

Go-Live Support	• One week of go-live support before transition to support team
	  ○ Unlimited email questions from a designated contact, 4 hour response
		• Two weeks of go-live support before transition to support team
		  ○ Unlimited email questions from a designated contact, 4 hour response
		• Best Practices check in at 60 days

NOTES:

*REQUIRES A GRAVITY FORM CONNECTOR PLUGIN FROM SAINT SYSTEMS.
**REQUIRES DOCUMENT CORE PACK.

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DELIVERY CONFIGURATION

TekStack's Delivery module provides companies the ability to manage projects, track backlog, assign resources to projects, and manage resource utilization.

Packages	Essentials	Premium
One-time Fees	$3,700	$9,200
Configuration & Rules	• Setup 1 project template • Setup 1 price list with 1 example resource and role, including costs and price	• Setup 2 project templates • Configure all roles, prices, and costs • Configure 1 example resource, cost and role associations
Data Load	• Not Included	• Provide Excel templates and 5 hours of assistance to load open projects based on a template (excludes project specific tasks, resource assignments, hours), resources, resource roles

Modifications	• One 1-hour requirements session
	• Up to 5 hours of customizations
	  ○ Add, remove and/or reorganize fields on forms, views, and dashboards
	  ○ Insert logos on document templates**
		• Two 1-hour requirements gathering sessions
		• Up to 10 hours of customizations
		  ○ Add, remove and/or reorganize fields on forms, views, and dashboards
		  ○ Custom tables
		  ○ Security roles
		  ○ Modify process, form and/or system logic
		  ○ Custom notifications.
		  ○ Modifications to project status document**

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Portal	• Install standard portal • Update logo and company name	• Install standard portal • Update logo and company name • 2 hours of UI changes (colors, fonts and/or images)
Training	• Self Directed Learning • One 1-hour Q&A session	• Self-Directed Learning • Two 2-hour train the trainer session
Project Governance	• Kick off meeting • Bi-weekly status report.	• Kick off meeting • Weekly status meeting • Monthly Steering Meeting

Go Live Support	• One week of go-live support before transition to support team
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REVENUE CONFIGURATION

TekStack's Revenue module provides the ability to invoice software, hardware, and services. It also automates subscription renewals, tracks recurring revenue, and revenue recognition.

Packages	Essentials	Premium
One-time Fees	$2,800	$7,000
Configuration & Rules	• Setup 2 subscription based products, one services based product, and one one-time fee based product, as an example with 1 price each.	• Setup 10 products with 2 prices each ○ Products can be any combination of subscriptions, services and/or one-time.
Data Load	• Not Included	• Provide Excel templates and 5 hours of assistance to load existing current and historical products and customer subscriptions data

Modifications	• One 1-hour requirements session
	• Up to 5 hours of customizations
	  ○ Add, remove and/or reorganize fields on forms, views, and dashboards
	  ○ Insert logos on document templates**
		• Two 1-hour requirements gathering sessions
		• Up to 10 hours of customizations
		  ○ Add, remove and/or reorganize fields on forms, views, and dashboards
		  ○ Custom tables
		  ○ Security roles
		  ○ Modify process, form and/or system logic
		  ○ Custom notifications.
		  ○ Modifications to invoice document**
		  ○ Custom email templates

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CONTINUED

Portal	• Install standard portal • Update logo and company name	• Install standard portal • Update logo and company name • 2 hours of UI changes (colors, fonts and/or images)
Training	• Self Directed Learning • One 1-hour Q&A session	• Self-Directed Learning • Two 2-hour train the trainer session
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Go-Live Support	• One week of go-live support before transition to support team
	   ◦ Unlimited email questions from a designated contact, 4 hour response
		• Two weeks of go-live support before transition to support team
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		• Best Practices check in at 60 days

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BUSINESS CENTRAL INTEGRATION

Packages	Essentials	Premium
One-time Fees	$1,500	$2,900
Basic Setup	• Install the extension into 1 Business Central (BC) environment • Connect BC to a TekStack Power Apps environment	• Install the extension into 2 Business Central (BC) environments • Connect each BC to a TekStack Power Apps environment (if available)
Data Load	• Provide 2 hours of assistance to connect existing BC records to TekStack records for currencies, units, products, roles, contacts and accounts	• Provide 5 hours of assistance to connect existing BC records to TekStack records for currencies, units, products, roles, contacts and accounts
Training	• Self Directed Learning • One 1-hour Q&A session	• Self-Directed Learning • One 2-hour train the trainer session
Project Governance	• Kick off meeting • Bi-weekly status report.	• Kick off meeting • Weekly status meeting • Monthly Steering Meeting

Go-Live Support	• One week of go-live support before transition to support team
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		• Two weeks of go-live support before transition to support team
		  ○ Unlimited email questions from a designated contact, 4 hour response

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HELP DESK CONFIGURATION

TekStack's Help Desk module is Microsoft's Dynamics 365 Customer Service Professional. It provides the ability to track, route, and resolve customer cases.

Packages	Essentials	Premium
One-time Fees	$3,700	$9,100
Configuration & Rules	• Configure 1 email queue and service level agreement (SLA)	• Setup of SLAs, Entitlements, and multiple routing rules, similar case rules, and mutiple emails queues
Tickets Data Load	• Not Included	• Provide Excel templates and 3 hours of assistance to load current and historical cases (tickets)

Modifications	• One 1-hour requirements session
	• Up to 5 hours of customizations
	  ◦ Add, remove and/or reorganize fields on forms, views, and dashboards
		• Two 1-hour requirements gathering sessions
		• Up to 10 hours of customizations
		  ◦ Add, remove and/or reorganize fields on forms, views, and dashboards
		  ◦ Custom tables
		  ◦ Security roles
		  ◦ Modify process, form and/or system logic
		  ◦ Custom notifications.
		  ◦ Any additional portal changes including form changes or look and feel.

Training	• Self Directed Learning • One 1-hour Q&A session	• Self-Directed Learning • Two 2-hour train the trainer session

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CONTINUED

Portal	• Install standard portal • Update logo and company name	• Install standard portal • Update logo and company name • 2 hours of UI changes (colors, fonts and/or images)
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CUSTOMER FEEDBACK CONFIGURATION

Packages	Essentials	Premium
One-time Fees	$700	$2,200
Installation	• Install Customer Voice	• Install Customer Voice
Net Promoter Score	• Setup 1 Net Promoter Score Survey with 2 questions	• Setup 1 Net Promoter Score Survey with 2 questions
Additional Survey	• Not Included	• Create 1 additional survey with up to 5 questions (for example, Customer Satisfaction Survey)
Send Survey	• Not Included	• Create 1 Power Automate Flows to send surveys or install and setup "Send Customer Voice survey from Dynamics 365" app for contacts
Training	• Self Directed Learning • One 1-hour Q&A session	• Self-Directed Learning • One 2-hour train the trainer session

Go-Live Support	• One week of go-live support before transition to support team
	  ◦ Unlimited email questions from a designated contact, 4 hour response
		• Two weeks of go-live support before transition to support team
		  ◦ Unlimited email questions from a designated contact, 4 hour response
		• Best Practices check in at 60 days

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MARKETING CONFIGURATION

TekStack's Marketing Automation module is powered by ClickDimensions. It provides the ability to do email marketing, integrate to the website, engagement scoring, and event management.

Packages	Essentials	Premium
One-time Fees	**$1,800**	**$4,500**
Configuration & Rules	- Setup DNS - Configure 1 web form and form fields mapped. - Configure 1 example campaign automation and 1 campaign - Setup 1 email template - Setup 1 scoring model	Essentials plus: - Setup up to 5 web forms - Configure 3 additional campaign automations - Setup 2 additional email templates
Training	- Self Directed Learning - One 1-hour Q&A session	- Self-Directed Learning - Two 2-hour train the trainer sessions
Project Governance	- Kick off meeting - Bi-weekly status report.	- Kick off meeting - Weekly status meeting - Monthly Steering Meeting
Go-Live Support	- One week of go-live support before transition to support team - Unlimited email questions from a designated contact, 4 hour response	- Two weeks of go-live support before transition to support team - Unlimited email questions from a designated contact, 4 hour response - Best Practices check in at 60 days

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MARKETING AS A SERVICE

TekStack's Marketing-as-a-Service is your built-in marketing team to get you off the ground, build best practices, and get you to a place where you can hire your own team.

Packages	Drive	Grow
Monthly (1 yr term)	$2,250	$3,900
Updated Key Messaging	• Included	• Included
Landing Pages	• Two landing pages to be used for campaigns like outbound sequences or events	• Four landing pages to be used for campaigns like outbound sequences or events
Manage LinkedIn Company Page	• Three posts per week • Build LinkedIn followers	• Three posts per week • Build LinkedIn followers
Blog Posts	• One custom blog post per month	• Two custom blog posts per month
Digital Assets	• Two digital assets (ex. guides, brochures, case studies) per year	• Four digital assets (ex. guides, brochures, case studies) per year
Video Edits	• Three new videos edits per year that can be posted to the website, on social, or YouTube	• Four new videos edits per year that can be posted to the website, on social, or YouTube

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MARKETING AS A SERVICE CONTINUED

List Building	• 250 newly researched contacts per month, human curated. • Lists imported	• 400 newly researched contacts per month, human curated. • Lists imported
Outbound Sequences Created	• One new outbound sequence created per quarter up to 30 days, 8+ steps	• Two new outbound sequence created per quarter up to 30 days, 8+ steps
Webinars	• Manage one webinar per year including registration landing page, promotion, and follow-up campaign	• Manage two webinars per year including registration landing page, promotion, and follow-up campaign
Monthly Review	• Report delivered	• Review meeting & action plan
Market Strategy	• Not Included	Use Pragmatic Marketing Framework to capture market problems, market definition, competitive landscape, differentiators, and positioning document.
New Website	• Not Included	New 13-15 page WordPress site including wireframe, graphic design, and markup.
Product Overview Video	• Not Included	3 minute product overview video including voice over, custom animation, integrated product video, intro/outro
Sales Tools	• Not Included	Tools used by the sales team to better position on opportunities including Alignment Letter , Sales Presentation template, Sample discovery questions Objection handling, document

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MARKETING OPERATIONS

MarkOps as a Service is like having a built in data and tech team to support your marketing operations. Perfect for the customer that needs a little extra technical help but can't justify the full-time hire.

Packages	MarkOps
Monthly (1 yr term)	**+$2,000** when added to marketing as a service
Configure Click Dimensions	• Refer to Premium edition on Click Dimensions page • Includes ongoing configuration changes on demand
Web Forms	• Setup new web forms on demand including integration to website
Campaign Management	• Setup new campaigns, campaign automations, events, email templates, emails sends; all on-demand
Monitor Inbound	• Ensure that new web inquiries are validated, assigned, and followed up timely.
Data Import	• Import new lists, checking for dupes, on-demand • Includes Intent Signal imports or integration jobs
Marketing Insights and Analysis	• Monthly marketing reports including trends and insights.

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BIZDEV AS A SERVICE

BizDev as a Service is like having your own Business Development Rep sending emails through outbound sequences. Perfect for customers not quite ready to hire their first BDR or Seller but dont have time to include contacts into sequences themselves.

Packages	BizDev
Monthly **(1 yr term)**	**+$1,000** when added to a marketing service package
Add contacts to a sequence	• Add contacts into new sequences, up to 300 new sequence participants added per week.
Email verification	• Verify emails of contacts to limit bounced emails which can harm domain reputation.
Monitor responses	• Monitor contact engagement including received email replies, clicks, and opens. • Deactivate bounced emails.
Manual LinkedIn touches	• Setup new LinkedIn account associated to your company as an employee • Send up to 50 InMails per month (requires a LinkedIn Professional account, +$89/mth) • Interact with up to 50 additional profiles each month
Monitor inbound & positive responses	• Ensure that new web inquiries are validated, assigned, and followed up timely.
Outbound Insights and Analysis	• Monthly marketing reports including trends and insights.

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HOURLY RATES

TekStack's services team can provide ad-hoc services including customization, data migration, data deduplication and clean up, email validation, system integration, and CRM administration services like backup and security. Projects billed hourly are invoiced in arrears at month's end.

Role	Hourly Rate US Dollars	Hourly Rate CAD Dollars
Business Analyst	$200	$240
Developer	$200	$240
Project Manager	$240	$300

TekStack can offer pre-paid time blocks at more favorable rates. Hours can be applied to any combination of roles. Time blocks are pre-paid services.

Time Block	US Dollars	CAD Dollars
10 hours	$1,800	$2,200
20 hours	$3,400	$4,200
100 hours	$16,000	$20,000

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THE FINE PRINT

- If additional Project Governance is required, this can be quoted.
- Project Governance assumes a 12 week project, for longer projects, more fees may apply.
- No data migration services are included beyond those listed in the packages
- Additional data migration services are provided as T&M hourly services only
- Service packages are paid 100% in advance, T&M quotes are paid monthly in arrears
- No customization services are included beyond those hours listed in the packages. TekStack will fix bugs as part of the software subscription, and will consider new feature requests though can't promise timeline for delivery.
- New customers that opt into a Marketing-as-a-Service package receive a $7000 rebate on packages.
- 25% discount on services packages when implementing 4 or more packages as one project scope.

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