



Success Plan

for Donorfy



Customer Success Plans

At Access we recognise that running your organisation is your top priority. Helping you to get the best from your chosen Access software is important to us, our Success Plans go beyond technical support to provide you with the tools and resources you need to succeed. Whether you prefer to self-guide or you would rather a more personal and proactive relationship to unlock the full potential of your investment, Access Success plans offer a level of engagement that is right for you.

Due to the wide range of software available from Access, the success and support services offered can vary, for this reason our products are classified into different categories of success and support services. The information outlined below is specifically for Donorfy.

Customer Success Plan Level

Choose the Success Plan level that is right for your business

The Essential Plan

The online service



Self-guided and technical support online

The Standard Plan

Get answers faster



For organisations that are happy to self-guide, but want the reassurance of faster access to support and being able to communicate by live chat as well as knowing that a Customer Success team is available and will check in with you from time to time.

The Premier Plan

Personal and Proactive



To maximise the return on your Access investment, enjoy a proactive relationship with a designated Customer Success Manager who aligns with you on your specific business outcomes, as well as having access to a designated Lead Technical Support Engineer.



The Essential Plan

The online service

The Essential plan is included as part of your subscription providing your teams with access to online resources and on demand webinar content.

Unlimited Problem Resolution Support Incidents

You can raise problem resolution support cases as required online. Problem resolution queries are technical in nature, for when something doesn't work as expected. Typically support hours are 09:00 -17:00, Monday to Friday. For some solutions this may vary, please check [here](#) for product and time zone-specific information.

Authorised Support Contacts

You can nominate two employees that can submit support cases online. All of your users can access the knowledgebase.

Accelerator Webinars

The live webinars delivered to our Standard and Premier customers will be recorded and made available to you via the Customer Success Portal.

Feature Release Updates

Stay informed about details of new releases ensuring your business continues to get more from your investment in the technology by adopting new features as they become available.



The Standard Plan

Get answers faster

A Standard Success Plan builds on the features of the Essential Success Plan, plus:

Chat Support ¹

Use the Chat facility to connect with our support teams in a quick and easy way.

Telephone Callback Service

Have the reassurance that if you have an issue that is more complex, as an authorised support contact you can request a call back from one of our support team.

Advisory Support Cases

In addition to the content provided online, help with common procedural questions is available through our support teams for Standard plan customers, to assist with those 'How do I...?' queries. How to assistance is subject to a fair usage policy and we reserve the right to recommend training or consultancy services where appropriate.

Access to the Customer Success Team

Our expert Customer Success Managers will check in with you annually, to understand any challenges and to guide you to content and services to help you get more from your Access product/s. The team will also reach out with digital roundups and invitations to webinars. ²

Adoption Clinic

Customers with a Standard Success plan can schedule a 15 minute clinic, to talk through any more in depth queries related to the use of the software for your organisation. ³

On Demand Guided Content

The academy content is provided as part of the Standard plan. This enables your team to access self guided learning to grow your knowledge of how to use Donorfy.

Authorised Support Contacts

You can nominate four employees that can submit support cases online. All of your users can access the knowledgebase.



The Premier Plan

Personal and Proactive

The Premier Success Plan includes the features of the Standard Success Plan, in addition, you will benefit from:

Premier Customer Success Manager (CSM)

As a Premier customer, you will have a designated Customer Success Manager, who aligns with you to understand your organisation's specific objectives, working in collaboration to create an agreed set of business outcomes to formulate your personalised Success Action plan. Your CSM will meet regularly with you to review progress against the agreed outcomes. The number of reviews is dependent on your overall Premier Success Plan spend (see [here](#) for details).

Where you elect a Premier service across multiple Access products, your designated Premier Customer Success Manager will be your advocate in Access and a single point of contact for all your chosen products.

Inclusive FlexPoints ⁴

Premier customers are granted an annual allocation of Access Flexpoints as part of the service. Flexpoints provide a simple way of accessing a wide range of services to assist you with achieving more with the technology. The services on offer vary from product to product, but include learning services, report writing, consultancy and 1:1 best practice guidance. Your Premier Customer Success Manager will work with you to recommend services to enable your organisation to achieve your desired outcomes. Customers may purchase additional Flexpoints supplementing those granted as part of a Premier Success Plan.

Lead Technical Support Engineer

Customers with a Premier Success Plan will be assigned a Lead Technical Support Engineer, who will service complex and critical cases. Simple how-do-I queries and Service Requests may be responded to by a Premier triage team where applicable, to facilitate a quicker response. This allows your Premier Lead Support Engineer to focus on resolving your business-impacting issues promptly.

Authorised Support Contacts




You can nominate eight employees that can submit support cases online. All of your users can access the knowledgebase.

¹ -Where available

² - A check in may be delivered via different channels for different products, by phone or digitally

³ - Clinics are offered on a first come first served basis and are limited to two per annum per organisation

⁴ - Must meet the criteria of the minimum spend for Premier to be eligible for Premier inclusive Flexpoints

Success Plan Levels				
		Essential 	Standard 	Premier 
Success Services				Minimum spend applies (see here for details)
	On Demand Guided Success Content - Academy		✓	✓
	Annual Check In		✓	✓
	Designated Premier Customer Success Manager			✓
	Tailored Success Action Plan			✓
	Customer Outcome Review Meetings			✓
	Accelerator Webinars		Recorded content ✓	✓
	Adoption Clinics ¹		✓	✓
Support Services	Online Knowledge Base		All users	All users
	Channels to Technical Support	In product Chat ²	Online Case Submission	Prioritised
		Telephone		Request Callback
	Service Hours - for product specific variations, time zones and public holidays observed click here , the times stated to the right are typical of most teams however there are some sector specific variations e.g. Hospitality, Health & Support Care		09:00 - 17:00 Monday to Friday	
	How do I ...? queries ³			online submission ✓
	Authorised Support Contacts		2	4 8
	Access to a Lead Technical Support Engineer			✓
	Initial Response Guidelines for support cases	Doesn't apply to live chat, the response guidelines are applicable when support requests have a case reference	P1 - up to 2hrs P2-P4 - up to 2 business days	P1 - up to 1hr P2 - up to 2hrs P3 - up to 4hrs P4 - up to 1 business day

1- Clinics are offered on a first come first served basis and are limited to two per annum per organisation

2 -Where available

3- Subject to a fair usage policy

4- Available on request for customers spending £50,000 (ore regional equivalent) or greater on their Premier CSP



Your Success is our Passion

[Find out more](#)

theaccessgroup.com/en-gb/support-hub/customer-success-services/

About The Access Group

The Access Group is one of the largest UK-headquartered providers of business management software to small and mid-sized organisations in the UK, Ireland, USA and Asia Pacific. It helps more than 100,000 customers across commercial and non-profit sectors become more productive and efficient. Its innovative cloud solutions transform how business software is used, giving every employee the freedom to do more of what's important to them. Founded in 1991, The Access Group employs approximately 6,800 people.

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