



Extend your Team with Managed Services

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Informer Customer Success



Agenda

1. What is Managed Services?
2. How can Managed Services help?
3. Dedicated Project Manager
4. Managed Services Projects
5. Managed Services Subscriptions
6. Managed Services Bundles

What is Managed Services?



- Tailored Support
 - Dedicated point of contact who understands your organization's unique needs
 - Flexible assistance that adapts as your priorities change
- Expert Guidance
 - Insights from experienced professionals with deep product knowledge
 - Recommendations based on proven strategies and industry best practices
- Customized Solutions
 - Configurations aligned with your specific workflows and objectives
 - Integration with your existing systems for maximum efficiency
- Ensure Best Practices Are Met
 - Regular reviews to validate processes against current standards
 - Proactive identification of improvement opportunities
- Get the Most Out of Your Investment
 - Ongoing optimization to enhance ROI
 - Resources to empower your team's success



How can Managed Services Help



Report Design

Highly customized visuals and reports design including Dashboards or customized export Templates.



Scripts and Calculations

Calculated Fields, Power Scripts, Informer Functions, Custom Fields or plugins creation to expand the functionality of Informer.



Dedicated Expert

Experienced industry-specific teams assist with database specific questions, defining custom links, and creating content based on best practices.



Informer Administration

Extra dedicated resource available to handle administrative tasks such as installation, upgrades, and Informer maintenance.



Priority Support

With Managed Services, any service request that you submit will receive priority routing to our customer success team.

Dedicated Project Manager



- **Single Point of Contact** – One dedicated project manager for all your Informer needs, from kickoff to ongoing support, ensuring nothing falls through the cracks.
- **Clear, Consistent Communication** – Centralized updates and status reports keep all stakeholders informed without conflicting messages.
- **Direct Access to Experts** – The project manager can quickly engage other team members who are specialists in specific areas of the software to resolve issues or accelerate progress.
- **Embedded Partnership** – Functions as an extension of your team, understanding your processes, priorities, and culture to deliver aligned outcomes.
- **Continuous Process Improvement** – Proactively identifies opportunities to streamline workflows, enhance efficiency, and maximize the value of the service.



Managed Services Projects Examples



- **Federal and State Reporting**
 - Gainful Employment
 - IPEDS Submissions– Cohorts and Financial Aid
 - XML Templates – Build complex templates for state reporting
- **Security Audit and Setup**
 - Review Security
 - Update/create Mapping Sets
 - Manage Team access
- **I4 to I5 Migration** – help with Migration, including best practices
- **Database Migration** – (U2 to SQL or PSQL)
- **Template Creation**
 - Insurance Proposals
 - Financial Statements
 - Financial Aid Award Letters
- **Dashboards and Visual Reports** – Build and share insights
- **Working Sessions** – Collaborative sessions to complete tasks and transfer knowledge



Managed Services Subscriptions



- Automatically renews every year
- Hours are available for you to use for one year
- Additional perks (assistance with upgrades, Entrinsicon registrations, system health checks)
- Can purchase additional hours at a discounted rate

	Essential Included	Silver \$2,400 /year	Gold \$8,100 /year	Platinum \$14,400 /year
New Release Advisory	✓	✓	✓	✓
Access Informer Help Center	✓	✓	✓	✓
Monthly Progress Report		✓	✓	✓
Assisted Installs & Upgrades	Unassisted	Assisted	Assisted	Assisted
Service Level	Standard	Priority	High Priority	Premium
Yearly Managed Service Hours		10	40	80
Dedicated Account Manager			✓	✓
Entrinsicon Seats Comped			1 Seat	2 Seats
System Health Check			1 Per Year	2 Per Year
Additional Managed Service Hours	\$275 / hr	\$240 / hr	\$200 / hr	\$175 / hr

Managed Services Bundles



- You also have the choice of purchasing a bundle of hours
- Great for specific upcoming projects
- Do not automatically renew
- Hours will be available for you to use for one year
- Additional hours can be added, if needed

Hours	10	20	40	80
Hourly Rate	\$275	\$250	\$225	\$200
Bundle Price	\$2,750	\$5,000	\$9,000	\$16,000



QUESTIONS?



Thank you!

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