

# Fraternal Round Table Wrap-Up

RoundTable April 2020



# New Client Engagement Model Available in 2020

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- **CSI's Vision:**
- **Being Client-Focused leads to Client Engagement**
- **Today's Client Engagement Model**
  - Account Manager as Single Point of Contact
  - Periodic AM/Consulting Meetings
  - Direct access to our award-winning Support Team
  - Financial Model - Time & Materials (T&M)
- **To be *the* standard of a client-focused, values-driven not-for-profit solution provider**



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- **Feedback through 2019:**

- Some perfectly fine with today's model – it's working great!
- Others "OK" with the model, but interested in listening to alternatives
- And still others sometimes feel like they are nickel & dimed a little
  - "Sometimes I don't call CSI because I'm not sure if I'm going to get billed or not"

- **Ugh! This is NOT client engagement!**

- We want clients contacting us through our various channels whenever they need help



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- **Coming in 2020...A new client engagement model**
- **CSI's Client Success Program**
  - Defined scope of services
  - Account Team vs. Account Manager
  - 3 Plans - Essentials, Premier, and Ultimate
  - Financial Model - Fixed Fee
    - **Monthly or Annual**
    - **Predicable and easy to budget**



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- **CSI's Client Success Framework**

Scope	Essentials	Premier	Ultimate
Database Diagnostics & Website Wellness Monitoring			
iMIS System Healthcheck			
iMIS and Product Upgrades			
Consulting & Account Management			
Training			

WIP

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Requires Auto Payment



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- **Rollout Plan**

- Identify candidates for a “pilot”
- Do a virtual “Roadshow” this quarter to review details
- Run a 6-month pilot with ~3-5 clients from July – Dec 2020

- **Next Steps**

- If interested in learning more, please contact:
  - **Your Account Manager, or**
  - **Brandi Barber ([bbarber@csiinc.com](mailto:bbarber@csiinc.com)), or**
  - **Bill Boehner ([bboehner@csiinc.com](mailto:bboehner@csiinc.com))**



# Your CSI Round Table Team

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- **Technical Gurus**

- Jon Gallas
- Matthew Dempsey
- Doug Morris
- Brandi Barber

- **Subject Matter Experts**

- Alison Kinney
- Trisha Haas
- Jodi O'Toole
- Angela Nimer
- Elizabeth Wojcik
- Matthew Dempsey
- Doug Morris
- Brandi Barber

- **Round Table Chair**

- Brandi Barber



# Wrap up

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- **Evaluations will be sent out in the next 24 hours**
- **Please share your feedback so we can continue to improve!**





**Thank you for attending!**

