



Insightly Marketing Support & Service Plan Comparisons

Insightly Marketing Support & Service Plans

Customer success is our top priority at Insightly. Our Support & Service Plans provide guidance, phone support, and training to help you get the most from Insightly Marketing. We'll proactively align our rapid innovation with your ever-changing needs. Whatever you want to achieve there's a plan that's perfect for you, and it's delivered by an Insightly employee—no third parties.

Support & Service Plans connect you with our team of product experts to ensure Insightly Marketing helps you achieve your business goals. All customers have access to email-based support, Insightly's comprehensive Help Center, and Community forums. For additional support and customer success resources, we offer the following Support & Service Plans.

Premium	Ultimate
<h2>\$1,500</h2> <p>Minimum per year, or 10% <i>(All prices USD)</i></p>	<h2>\$3,000</h2> <p>Minimum per year, or 15% <i>(All prices USD)</i></p>
<p>Designed to help you get started quickly, ensuring long-term adoption and growth.</p> <ul style="list-style-type: none">• Direct access to an Insightly product expert• Quick response time for support questions• Proactive adoption program• Personalized training for your admins	<p>Implement and adopt rapidly, ensuring your Marketing strategy aligns with your business needs and sales cycle.</p> <ul style="list-style-type: none">• Direct access to a senior product expert• Customized training for all users• Quarterly account reviews• Advanced campaign workshops

Plan feature comparison chart

	Premium	Ultimate
Online Community access	●	●
Quarterly CEO webinars	●	●
Onboarding program	●	●
Email support	● <i>Response time <6 hours</i>	● <i>Response time <1 hour</i>
Phone support <i>(4am-7pm PST)</i>	●	● <i>Priority support</i>
Customer Success Manager	●	● <i>Senior manager</i>
Training	● <i>Admin only</i>	● <i>All users</i>
Account reviews	● <i>Semiannually</i>	● <i>Quarterly</i>
Marketing campaign workshops <i>Insightly's team will help you build any of your advanced features</i>		● <i>Data model building, list management, email creation, journey building, demand capture, campaign reporting, dashboards</i>

Frequently asked questions

Q: Which Support & Service Plan is best for my business?

We strongly recommend a Support & Service Plan for all Insightly users, so we'll work with you to determine which program fits your company best based on Marketing experience and company goals.

Q: Why do I need a Customer Success Manager?

An Insightly Customer Success Manager (CSM) is a product expert who will partner with you to implement Insightly successfully and ensure your team adopts Insightly fully. They will develop an in-depth understanding of your business and provide personalized guidance throughout your Insightly experience.

Q: How will we work together?

Included in your Support & Service Plan are a number of video conference sessions hosted by your designated CSM.

Possible topics include:

- Platform training for admins and users
- Configuring your account to fit your business structure
- Reviewing your team's adoption and usage metrics
- Training and implementation of new platform features
- New feature configuration and implementation
- Scaling Insightly as your business grows

These sessions are recorded and shared with you in a follow-up email alongside other useful resources.

Q: How do Support & Service Plans work across products?

You will receive the same ongoing benefit, from the same Customer Success Manager, for both our CRM and Marketing products when you purchase and use them together. We find that our customers grow faster when they have us proactively helping them to continually align our rapid innovation with their changing business needs.

Q: What is an Account Review?

The Account Review is a key part of all of our Support & Service Plans. Your dedicated Customer Success Manager will conduct a full review of your account to ensure you are utilizing Insightly's full capabilities, provide an account synopsis with recommended areas of focus, and ensure that Insightly continues to grow with your business.

Q: Is Insightly's Onboarding Program different from a Support & Service Plan?

Yes. The Insightly Onboarding Program is specific to first-time Insightly customers who are focused on configuring Insightly, driving successful adoption, and accelerating time to value.

Frequently asked questions *(continued)*

Q: Do I get access to the Insightly Onboarding Program with a Support & Service Plan?

Yes. By subscribing to a paid Support & Service Plan you gain access to the Insightly Onboarding Program.

Q: How long does the Onboarding Program take to complete?

Onboarding varies from one business to the next, but it typically takes 30–45 days or 4–8 meetings with a Customer Success Manager. During your initial kickoff call with your Customer Success Manager, they'll assess your Marketing needs and provide a clearer timeline to graduate from the Onboarding Program.