COMMON TERI
SERVICES

Trusted Guides on Your Salesforce Journey

MANAGED
SERVICE PLANS

COMMONTERI

How does a Managed Services Plan benefit you?

Our plans provide expertise, vision, support, and value.

With a managed services plan from CommonTeri, you can focus on your mission first and know your constituent and program management systems are in good hands.

Confident
I want to feel confident that my data are reliable and complete and that my reports and outcomes are accurate and timely.

Supported
I want to feel supported by experts as I navigate technology and make design choices that affect the well-being of my staff.

Prudent
I want to feel prudent, that I am investing our organization's resources in valuable expertise at a lower cost than I could hire at my organization.

Knowledgable
I want to feel knowledgable, assured that I'm implementing best practices, streamlining my processes, and getting relevant training.

Secure
I want to feel secure knowing that my management systems are backed-up, maintained, and safe.

Connected
I want to feel connected to a community of thought leadership to help address tough questions about system improvements and strategic planning.

Prepared
I want to feel prepared for the future and the technology changes that will come my way.

CommonTeri specializes in data solutions that accelerate your organization's mission and achieve your outcomes with less effort.

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Shared Strategies.
Valued Relationships.
Sustainable Solutions.

Which type of Managed Services Plan is best for you?

Consider the statements and recommendations below.

I have a dedicated person with the time and talents to maintain and build our solutions. This person is ready to learn best practices and new skills with the support of a team of experts ready to answer our questions.

Guided DIY: Are you small in budget but mighty in talent? These plans make sure do-it-yourself organizations with tech-minded data staff have an expert team behind them.

Our staff always enjoys learning more and our systems generally run well, but our time is not best spent doing regular maintenance.

Strong Foundation: Are you are happy overall with your Salesforce instance but want to reduce staff time spent on routine maintenance? In these plans, our expert team maintains and monitors your system while providing your staff with enhanced support.

I have so many ideas for how we could better leverage our system. I need someone with the time, skill, and experience to make this happen.

Remote Admin: Do you wish that your Salesforce system was a little more magical? Where you don't have to spend time maintaining it? Where you just speak the word and reports, dashboards, mailing lists, and email automations just appear? A place where the data is always tidy (and you didn't spend hours making it that way) and error messages just fade away? You are looking for our Remote Admin plans.

CommonTeri supports each customer with a full team of certified experts to guide and assist your staff in all areas of Salesforce support and development.

Guided DIY

Designed for self-service organizations with robust data staffing

Guided DIY services focus on:

- Coaching your internal staff with Salesforce administrator access to do the work themselves.

- Providing expert recommendations, checklists, and training opportunities.
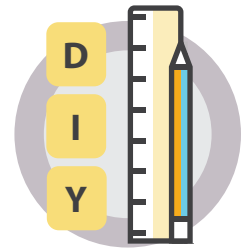
Guided DIY plans are best for organizations that:

- Need the most budget-friendly plan

- Like to learn and do the work themselves

- Have a technical-minded internal staff with time to invest

Strong Foundation

Designed to reduce staff time spent on routine maintenance

Strong Foundation services focus on:

- Handling maintenance and release readiness, allowing your team to focus on your mission

- Monitoring errors and providing expert advice as to how errors should be handled and prevented

- Expanding support through our Case Management System and a bank of Helpdesk hours

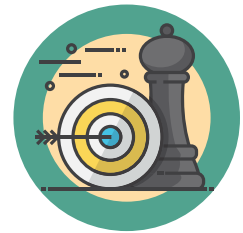**Strong Foundation** plans are best for organizations that:

- Have a smoothly-running Salesfore solution

- Have relatively well established business process and procedures that are reflected in their Salesforce instance

- Have technical-minded in-house data staff who can follow guidelines and instructions to fix and prevent errors

Remote Admin

Designed to care for your data the way you care for your mission

Remote Admin services focus on:

- Addressing current process challenges and clearing obstacles to growth and efficiency

- Providing expert consulting on strategy, goal-setting, and models for continuous improvement

- Building the system you want by implementing new features, automation, integration, and training as needed

- Sustaining you via prompt-response support channels

Remote Admin plans are best for organizations that:

- Are expanding and/or changing and want to ensure their Salesforce instance keeps up

- Have forward-thinking leadership with big ideas that would benefit from thoughtful project scope and planning

- Have a varied list of requests and support needs

What do Managed Services Plans provide to you?

CommonTeri supports your six key technical needs.

Monitoring
We have our eyes on your error logs, checking for issues and recommending solutions.

Maintenance
We keep you running smoothly, completing routine checkups and checkins.
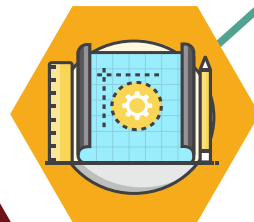
Reporting
We create monthly reports on your system use and identify areas of concern.

OUR MANAGED SERVICE PLANS

Improvements
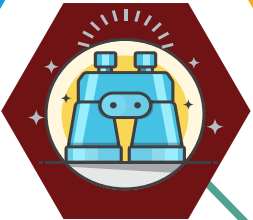We provide expert consultation for training, system improvements, and strategic planning.

Remote Support
We help you resolve issues and answer your questions promptly and thoroughly.

Proactive Support
We handle Salesforce readiness and action items, recommended optimizations, and integration maintenance.

CommonTeri expertly handles key data processes and tasks, allowing your internal team to focus their work on your mission.

Managed Services: Maintenance Comparison

Stay running smoothly with routine checkups and checkins.

	Maintenance
Guided DIY	• Checklists: We provide 70 maintenance checklists to be completed by the customer each year. • Access: We do not directly access an organization's Salesforce instance. • Support: Coaching for staff who have System Administrator access to Salesforce
Strong Foundation	• Checklists: We complete your 70 maintenance checklists plus recommended maintenance and release readiness actions. • Errors: We provide error monitoring, review, reporting and recommendations for you to follow to address current issues and prevent future ones. • Access: We becoms a user in your Salesforce instance and all work is completed by a Certified Salesforce Administrator. • Support: Same as the Guided DIY Plans.
Remote Admin	Same services as the Strong Foundation plans.
All Plans	• Support: Continuing education is provided through our CommonKnowledge training opportunities. Cohort sessions are offered frequently during the year.

Managed Services: Monitoring Comparison

Keep errors to a minimum and have a plan for resolution.

	Monitoring
Guided DIY	• Error Monitoring: The customer follows instructions to set up best-practice error monitoring and management. • Error Resolution: As errors happen, questions can be asked on the CommonTeri Customer Community or in daily Office Hours. The customer resolves the errors. • Office Hours are limited to 2-3 named individuals who have System Administrator access to Salesforce.
Strong Foundation	• Error Monitoring: CommonTeri sets up all error monitoring to come to our dedicated MVP support desk. Errors are reported and reviewed to determine if action is needed. • Error Resolution: The customer determines how the errors will be resolved and completes the next steps. • Office Hours are expanded to 4 named individuals who have System Administrator access to Salesforce.
Remote Admin	• Error Monitoring: Same as Strong Foundation plans. • Error Resolution: CommonTeri figures out an error management plan for you. • Office Hours: Same as the Strong Foundation plans.
All Plans	• Support: Customers have login access to the CommonTeri Customer Community. • Office Hours are held every week Monday through Friday except on quiet days.

Managed Services: Reporting Comparison

Know what you need to know, when you need to know it.

	Reporting
Guided DIY	• Guidance: Customers receive the quarterly CommonWealth newsletter and the weekly Monday Morning Memo, with reminders of action items. • Review: Customers have access to a monthly Service Plan Review that shows engagement level with CommonTeri.
Strong Foundation	• Guidance: Same as the Guided DIY Plans. • Review: Customers have access to a monthly Service Plan Review plus a monthly visit with their CommonTeri account manager. • Case Management: Customers have access to the CommonTeri case management system to submit and track Helpdesk requests. • Dashboards: We will set up a "Goal Zero" dashboard to show you which data need attention to stay in tip-top shape.
Remote Admin	Same services as the Strong Foundation plans.

Managed Services: Improving Comparison

Consult with nonprofit experts for continuous improvement.

	Improving
Guided DIY	• Analysis: Depending on the plan level, we provide 5-10 hours per year of one-on-one business analyst sessions. • Planning: We provide 1 hour per year with our senior leadership team for consultation, planning, and ideation.
Strong Foundation	• Analysis: We provide 22 hours per year of business analysis, including meetings and quarterly account reviews. • Planning: We provide 2 hours per year with our senior leadership team for consultation, planning, and ideation. • Support: We provide 22 hours per year for Helpdesk requests, often used for taking care of small administrative tasks that arise throughout the year.
Remote Admin	• We provides 45+ hours per year of business analysis, including meetings and monthly account reviews. • Planning: Same as the Strong Foundation Plans. • Support: We provide 45+ hours per year for Helpdesk requests, including regular uploads, data clean-up, integration maintenance, donor software management, email automation, report building, dashboard building, training prep and delivery, and project scope creation. • Development: You get a 50% discount for CommonSolutions and up to 20% off development work.

Note: All sessions are held via Zoom.

Managed Services: Proactive Support Comparison

Stay ahead of the game with Salesforce experts on your team.

	Proactive Support
Guided DIY	• Communication: Customers receive the weekly Monday Morning Memo with reminders of action items. • Action Items and Release Readiness: Customers access the CommonTeri knowledge base of recommendations for handling Salesforce Release Readiness, Salesforce Action Required alerts, and supported integration updates.
Strong Foundation	• Communication: Same as the Guided DIY Plans. • Action Items and Release Readiness: We take care of those pesky notices telling you to "prepare for this" and "action is required" for that. This ensures sure you are ready for the next Salesforce release and that integrated solutions on our preferred support list stay up to date.
Remote Admin	• Communication: Same as the Strong Foundation plans. • Action Items and Release Readiness: Same services as the Strong Foundation plans. • Personalized Support: We take care of health check items, Salesforce optimizer items, and maintaining your integrations. This is where CommonTeri's commitment to 200 hours per year of staff training really comes in handy for you and your team! We have the experts to address your specific needs.

Managed Services: Remote Support Comparison

Rely on multiple channels for knowledgable customer service.

	Remote Support
Guided DIY	• Resources: Customers have access to Office Hours and the CommonTeri Community. • Access: We do not directly access an organization's Salesforce instance.
Strong Foundation	• Resources: Same services as Guided DIY plans. • Access: We become a user in your Salesforce instance and all work is completed by a Certified Salesforce Administrator. For Literacy Nimbus customers, we access your system through granted login access.
Remote Admin	• Resources: Same services as the Strong Foundation plans • Access: Same services as the Strong Foundation plans. • Phone Support: We provide tiered access to user phone support for user maintenance and Helpdesk issues. User phone support can include Experience Cloud users as well.
All Plans	• Support: Continuing education is provided through our CommonKnowledge training opportunities. Cohort sessions are offered frequently during the year. • Office Hours are held every week Monday through Friday except on quiet days.

CommonTeri Custom Development

Designed to fill the unique needs of your organization

Our CommonSolutions

CommonSolutions are small, affordable projects with well-defined scopes and preset checklists of deliverables. Most are highly useful tools and features that are frequently asked for by our nonprofit customers.

Sold at a flat price upon request, our CommonSolutions are available for all Managed Service Plans.

Ad Hoc Projects

Ad Hoc Projects are great ways to implement large processes, new features, and one-time ideas. Some of our favorite Projects include robust registration solutions, Salesforce conference applications, and seamless integrations.

Sold individually, Ad Hoc Projects are available for Strong Foundation and Remote Admin plans.

Innovation Plans

Innovation Plans develop solutions just for you! Our team of expert developers will listen intently to your ideas and goals, explore options with your team and implement the best solutions. Scoped, built, and updated through our Agile development cycles, Innovation Pland are only available for Remote Admin plans.

LitNim: Nonprofit Data Management Solution

Designed for robust program management, right out of the box.

LitNim (Literacy Nimbus), is a program and outcome management solution for nonprofits, built with the power of Salesforce. LitNim streamlines program scheduling, enrollments, attendance, assessments, outcomes, and reporting.

Start right away with great out-of-the-box features and customize it with support from our team. Available on the Salesforce AppExchange.

Created by CommonTeri Services with 5 core values, LitNim is:

- Focused on showing the good work of organizations to their clients, their community, and their funders;
- Structured to be useful to a variety of nonprofits via a flexible configuration;
- Designed to improve funding opportunities for community-based nonprofits;
- Built on the idea that program delivery activities drive data collection and "data entry" is not a separate event; and
- Priced to be affordable to small budgets.

Who benefits most from using LitNim? Direct service orgs, including adult and family literacy, after/out-of-school programs, equine therapy, and more!

Why should you trust CommonTeri Services?

We are experts in nonprofit management and Salesforce solutions.

CommonTeri Services has:

- Extensive experience in data management, Salesforce development, nonprofit leadership, and small business management.

- Team members with the appropriate certifications for the type of work they do for our customers.

- A impressive track record of high-quality service to 200+ organizations. Over 70 of these organizations are still currently served by one of our plans.

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Established in 2014

Shared Strategies.
Valued Relationships.
Sustainable Solutions.

The CommonTeri Team has a combined...

40+	50+	50+
years of Salesforce experience	Salesforce certifications	years of working with nonprofits

![COMMONTERI logo] **Shared Strategies.**
Valued Relationships.
Sustainable Solutions.

Why should you rely on CommonTeri Services?

We build a relationship with you to support your needs and goals.

CommonTeri Services provides:

salesforce **PARTNER** SINCE 2019

- A highly-experienced team who works alongside your Salesforce system administrators and staff, giving you the benefit of a full Salesforce department.

- Set up and support to extend your Salesforce instance with tools and integrated apps. Each of our team members is required to complete at least 200 hours of continuing education per year, so we know the solutions that work!

- A robust infrastructure including case management, maintenance checklists, an online customer community, and daily office hours.

The CommonTeri Team's certifications include:

CERTIFIED Advanced Administrator   CERTIFIED Nonprofit Cloud Consultant   CERTIFIED Platform App Builder   CERTIFIED Platform Developer I   CERTIFIED Business Analyst   CERTIFIED Experience Cloud Consultant

Extend your Salesforce instance with integrations

We have experience in a large number of tools and apps.

CommonTeri Preferred Solutions

Our preferred solutions are go-to options that we prefer our customers look at first.   These are proven tools that we use, know, and recommend frequently.

Salesforce Tools:

- Sales Cloud
- Service Cloud
- Experience Cloud
- Marketing Cloud Account Engagement (formerly Pardot)
- Enablement Sites (formerly myTrailhead)
- NPSP
- Program Management Module
- Nonprofit Cloud
- Quip
- Slack
- Volunteers for Salesforce

Integrated Apps and Solutions:

- Literacy Nimbus
- Breadwinner for Quickbooks
- Breadwinner for Payments
- Spanning
- Apsona for Salesforce
- Apsona Mail and Email Merge
- Apsona Duplicate Management
- Declarative Lookup Rollup Summaries
- Mass Action Scheduler
- Volunteers for Salesforce

Get support for the tools you use

We can help you with online fundraising and other popular apps.

CommonTeri Supported Solutions

Supported Solutions are tools that some of our customers use. We know enough about them to troubleshoot problems but may not be able to answer complex questions about them.
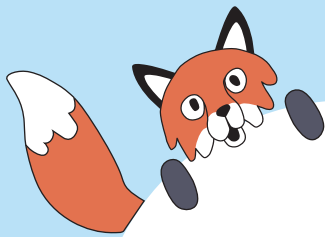
Online Giving Tools

There are so many of these!
Listed below in alphabetical order, our recommendations vary based on a customer's specific needs.

- Better Unite
- Classy
- Click & Pledge
- Give Lively
- iATS
- One Cause

Other Apps and Integration Tools

- FormAssembly
- MailChimp to Salesforce Connector
- Zapier
- SyncApps (Cazoomi)

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