Customer Success Mapping

We Want You to Succeed, so We've Got Your Back.

We are committed to investing in your success and we understand that your company has unique needs. A well thought out, customized deployment and training plan is key to success. Our 3 Phase Approach to implementation and training provides a roadmap for your success.

Dedicated Customer Success Link Contact

We know your time is valuable, so when you purchase Estimating Link, we provide you with a knowledgeable, dedicated **Customer Success Link (CSL) contact**. Your CLS contact will guide you through the entire process from start to finish. You'll always know who to call when you have questions about any aspect or phase of onboarding.

Your CSL contact will learn the specific needs of you, your team, and your company to design a customized Customer Success Map inclusive of implementation, training and on-going support. We'll make sure that your Customer Success Map aligns with your strategic goals and a map to help you achieve them.

"By far the easiest and most adaptable estimating software I have ever used, and the owner and program writers are readily accessible should technical assistance be required."
Kevin Flanders, BCR Land Services

Phase 1

IMPLEMENTATION

Comprehensive, Virtual Implementation

We know time is money. We make getting you and your team up and running as soon as possible, a priority, while simultaneously ensuring long-term success. Our implementation process is simple and easy, and we work with you and/or your IT department from start to finish. Virtual implementation utilizes screen share technology to make the process smooth.

Includes:

- Installation of Estimating Link on your users' workstations and/or laptops
- Configuration and deployment of User Management Module
- For Enterprise users:
    - Installation of Server Configuration Tool
    - Initial database configuration

Phase 2

INITIAL SETUP & TRAINING

Training for Your Company's Unique Needs

Your Customer Success Link contact will learn your company's specific needs and develop a customized training plan that's right for you.

Our onboarding and training plans are flexible and are offered as live virtual trainings. Training will be accomplished over the first 30 days of being a TCLI customer, and the number of training sessions is unlimited. On-site Trainings are available upon request and at an additional cost. It is in our best interest that you and your team are properly trained so you get more from your program with less unanswered questions.

Items that Will be Covered:

- Overview & Navigation of the program
- Proper Setup & Configuration with Global Company Settings
- Customizable Displays & User Preferences
- Personalization of Proposals & Quotes
- Assistance with Creating or Importing Rates - the Building Blocks of the program
- Building your first bid – Item creation, adding resources, adding markup, and finalization
- Support with Importing or Creating your Libraries for Companies, Customers, Vendors, Project Classifications, Cost Codes, Sections, and Templates.
- Review of our Extensive Report Offerings

Phase 3

ONGOING TRAINING

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Customer Support

When you call for support, your call is answered by our live, friendly Reception Team. You can talk with your CSL contact or with any one of our live Support Team members. All our support is handled here in the United States by knowledgeable, easy to understand team members.

Forgot where to find a feature in the program? Have a question on a calculation? Want to install the program on a new computer? Call us for answers to all these questions and more. We are happy to help and we like hearing from you.

Continuing Education

Live Virtual Trainings & Webinars

Even our most advanced users of Estimating Link find value in continuing education. We offer live virtual trainings and webinars that cover hot topics and frequently asked questions.

Online Library of Trainings and Tutorials

Don't feeling like chatting? No worries. Access our Online Library that houses all our past live recorded trainings and quick tutorials. The library consists of easy to watch, on-demand videos for both beginners and experienced users. Grab a cup of coffee, have a seat, and turn on a video to see what your program can do for you.