# Bright Tax

# Customer Success Membership

## YEAR 1

| | Basic | Standard | Premium |
|---|---|---|---|
| **Pricing** *All contracts are annual* | **£300 per year** **£25 paid monthly** | **£1,200 per year** **£100 paid monthly** | **£2,400 per year** **£200 paid monthly** |
| **Onboarding** | Guided Onboard: <br> - 1 x 45 min consultation calls to guide through: <br>    - Staff set up <br>    - Client Upload | Guided Onboard: <br> - 2 x 45 min consultation calls to guide through: <br>    - Staff set up <br>    - Client Upload | Assisted Onboard: <br> - 3 x 60 min consultation calls to assist with: <br>    - Staff set up <br>    - Client Upload |
| **Acc Mgmt / Business review** | - 1 x 60 min remote check in <br> - 4 x Quarterly business review | - 2 x 60 min remote check in <br> - 4 x Quarterly business review | - 4 x 60 min remote check in <br> - 4 x Quarterly business review |
| **Training** | - Webinar <br> - 1 x 90 min remote session | - Webinar <br> - 2 x 60 min remote champion training session <br> - 2 x 60 min remote user session | - Webinar <br> - 1-day on-site user training, with agenda tailored to the customer |

## YEAR 2+

| | Basic | Standard | Premium |
|---|---|---|---|
| **Acc Mgmt / Business review** | - 1 x 60 min remote check in <br> - 4 x Quarterly business review | - 2 x 60 min remote check in <br> - System Health Check - set up / configs <br> - 4 x Quarterly business review | - 4 x 60 min remote check in <br> - 1 day site visit (to be used against the customer's needs) <br> - 4 x Quarterly business review |
| **Training** | - Webinar <br> - 1 x 90 min remote refresh session | - Webinar <br> - 1 x 60 min remote champion refresh session <br> - 1 x 60 min remote user refresh session <br> - 2 x 60 min remote new staff user session | - Webinar <br> - 1 x 60 min remote champion refresh session <br> - 2 x 60 min remote user refresh session <br> - 4 x 60 min remote new staff user session |

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