Insightly CRM
Support & Service Plan Comparisons

Insightly CRM 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 out of Insightly CRM. No matter what you want to achieve, there's a Support & Service Plan that's perfect for you.

Support & Service Plans connect you with our team of product experts to ensure Insightly CRM 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 to fit your business needs.

Premium	**MOST POPULAR** Ultimate	Admin
$1,500	$3,000	$10,000
Minimum per year, or 10% *(All prices USD)*	Minimum per year, or 15% *(All prices USD)*	Minimum per year, or 30% *(All prices USD)*
Designed to help you get started quickly and ensure long-term adoption.	Work directly with a Senior expert to adopt and deploy faster, and achieve your business goals.	Full service program with dedicated Insightly expert to administer your account.
• Direct access to an Insightly expert • Quick response time for support questions • Expert guidance on system configuration • Personalized training	• Top priority support • Customized training • Proactive account reviews	• Account configuration • Build workflows and business processes • Creation and delivery of custom reports • Monitor data integrity

Plan feature comparison chart

	Premium	Ultimate	Admin
Online Community access	●	●	●
Quarterly CEO webinars	●	●	●
Onboarding program	●	●	●
Email support	● *Response time <6 hours*	● *Response time <1 hour*	● *Response time <1 hour*
Phone support (4am–7pm PST)	●	● *Priority support*	● *Priority support*
Customer Success Manager	●	● *Senior manager*	● *Senior manager*
Training	● *Admin manager*	● *All users*	● *All users*
Account reviews	● *Semiannually*	● *Quarterly*	● *Quarterly*
Advanced feature workshops *Insightly's admin team will build any of your advanced features*		● *Dashboards, Custom Object/App, or WFA*	● *Dashboards, custom objects/apps, & WFA*
Zapier integration support		●	●
Professional services		● *10% discount*	● *20% discount*

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 CRM experience, employee count, 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: **With an Admin Support & Service Plan, who is my primary point of contact?**

Your primary point of contact for technical support or administrative work is your Insightly Admin. For guidance on industry best practices and how to use Insightly to meet your business goals, your designated Senior Customer Success Manager is here to help.

Q: **If I have an Admin Plan, what are the daily administrative processes my Admin team will cover?**

Your Insightly Admin team will help you manage all your day-to-day administrative needs including, but not limited to:
- Adding and removing users
- Creating reports
- Ongoing account configurations like creating custom fields, automated workflows, pipelines, and activity sets

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.

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 CRM needs and provide a clearer timeline to graduate from the Onboarding Program.