

# Implementation Packages

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## What is this service?

Our Implementation Packages are our comprehensive service packages here to help you get onboarded as quickly as possible with your new application. We offer expert guidance along with tailored solutions to best fit your business needs. Together, we'll:

- **Strategize and prioritize around your business needs:** We'll map your Perfect Customer Lifecycle, prioritize your business automation opportunities, and select your proven automations.
- **Move your content over to Keap:** Our Experts will import your data and recreate your marketing assets and automations.
- **Build and launch your first automations:** We'll help you customize and fully launch your first 2-5 proven automations.
- **Keep the momentum going throughout your first year** with regular check-ins and strategy consultations.

## Implementation Packages:

|                                                        | Ignite         | Grow          | Scale          |
|--------------------------------------------------------|----------------|---------------|----------------|
| Business mapping session                               | ✓              | ✓             | ✓              |
| Proven automations                                     | 5              | 10            | 15             |
| Automations launched for you                           | 2              | 3             | 5              |
| Basic data import                                      | ✓              | ✓             | ✓              |
| 1:1 Recreation services                                | Up to 15 hours | Up to 20 hour | Up to 25 hours |
| Weekly calls with Implementation Strategy Manager      | Month 1        | Months 1-2    | Months 1-2     |
| Monthly strategy calls with Customer Success Manager   | Months 2-6     | Months 3-6    | Months 3-6     |
| Quarterly strategy calls with Customer Success Manager | Months 7-12    | Months 7-12   | Months 7-12    |
| Third-party tools integrated                           | Up to 2        | Up to 3       | Up to 5        |

|                            |         |         |         |
|----------------------------|---------|---------|---------|
| <b>One-time investment</b> | \$1,500 | \$2,500 | \$3,500 |
|----------------------------|---------|---------|---------|

You can **save up to \$1,500** on implementation — Ask us how!

#### Some Quick Definitions:

- **Business mapping session:** Work with your Implementation Strategy Manager to map how you collect leads, convert clients, create raving fans and optimize your business operations. We'll orient your business around the Perfect Customer Lifecycle framework to identify what's working well and where there are opportunities for growth.
- **Proven automations:** Choose from our time-tested, proven workflows designed to streamline your business processes, automate your marketing and enhance your efficiency.
- **Basic data import:** You export it, we'll import it! Keap will import up to five total CSV files of contacts, contact notes and tags at no additional charge! Learn more about this service [here](#). Need more than contacts and notes? We also offer additional import services - review all of our options [here](#).
- **1:1 Recreation services:** We'll recreate your marketing assets (including landing pages, web forms, automations and email templates), matching your content as close to the original as possible. Learn more about this service [here](#).
- **Strategy calls:** Work with your Customer Success Manager to continue driving your business goals, receive personalized guidance and ensure you're maximizing your value from Keap.
- **Third-party tools integrated:** We'll help you connect up to 5 compatible tools to Keap using Zapier, PlusThis and/or Parsey (note that these services may require separate subscriptions.) For example, we'll help you connect your Calendly to Keap using Zapier so that your Calendly contacts are automatically added to Keap.

## How do I purchase an Implementation Package?

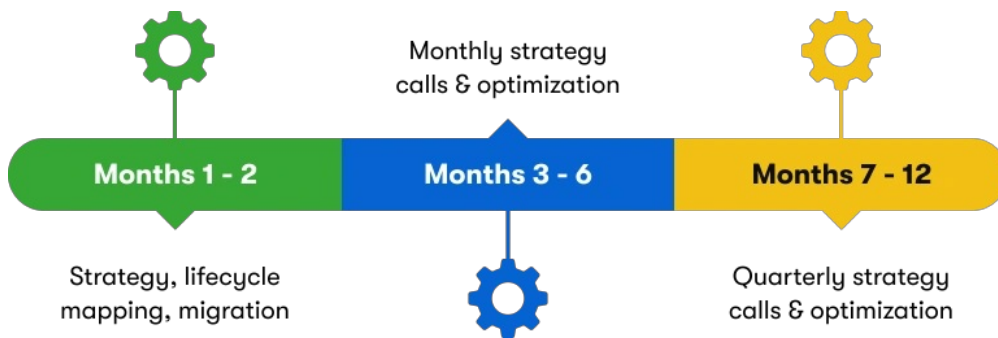
Your Sales Associate will be able to assist with purchasing the best package to suit your needs!

## Who will I be working with?

You'll be working with a coordinated team of Keap experts who will help you get up and running as quickly and seamlessly as possible.

- **Customer Success Manager (CSM):** Your main point of contact, who connects you to the help you need and advises you on strategy and how to maximize your investment.
- **Implementation Strategy Manager (ISM):** Helps create your implementation strategy, trains you on the software and helps with setup and customization.
- **Import & Recreation Specialists:** Handle importing your data and recreating your marketing assets into Keap from your current system.

## What will my first year look like?

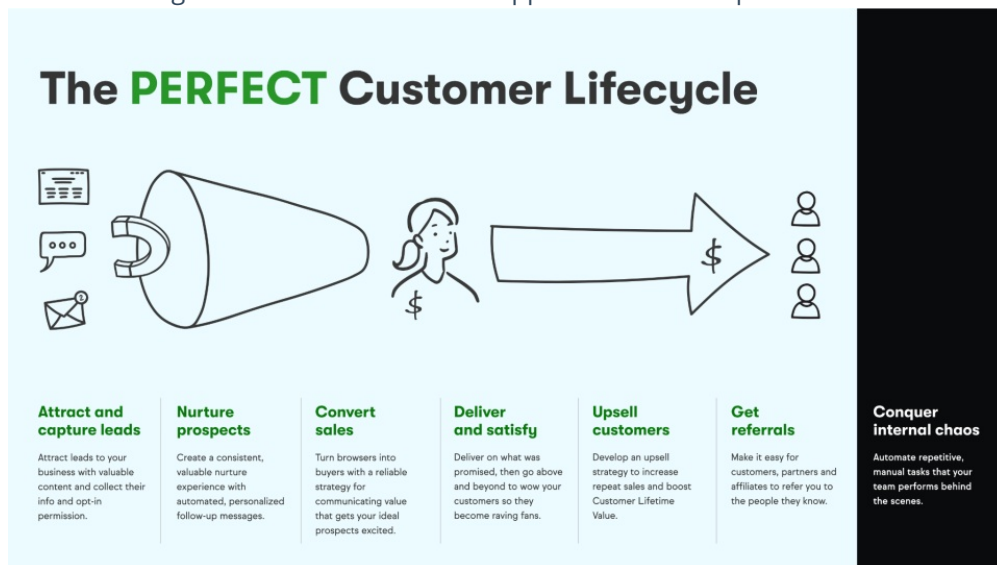


Don't worry, we've got you! Your first year here at Keap is guided overall by your Customer Success Manager. **They'll be your main point of contact for your first year at Keap.** To start:

- We'll get you logged into Keap first thing.
- We'll first review what data you need moved over to Keap so we can get you connected to the right person for the job. Contacts, companies, tags, notes and more? Check! Email templates, automations, landing pages and forms? Check!
- We'll get you booked for your first call with your Implementation Strategy Manager - aka your coach!

Your Implementation Strategy Manager (ISM) will help get you up and running with the application. They'll work with you for 1-2 months, depending.

- Together, they'll get you comfortable using the software with one-on-one guidance laser-focused on your goals.
- Your ISM will also import your contacts, set up your integrations, and help you launch several automations.
- On your first call, you'll map your Perfect Customer Lifecycle. We'll orient around how your business collects leads, converts clients, creates raving fans and optimizes business operations to identify what's working well and where there are opportunities for improvement.



- We'll prioritize your biggest business opportunities, determine the best Proven Automations for the job, and launch between 2-5 automations together!

While you're working with your ISM, our 1:1 Recreation Coordinator and our Data Specialist will also be busy getting your data moved into Keap as seamlessly as possible.

- No worries - this step may not apply to you. This is only relevant if you have a large amount of data to migrate or if your data is particularly complex.
- These teams operate "behind the scenes", but you'll likely have 1 or 2 calls to make sure we're getting your data transitioned over properly.

Once you're done launching your automations with your Implementation Strategy Manager, your Success Manager will keep the momentum going with monthly and quarterly strategy sessions. You'll have a full year of support from Keap's Team, making sure you're setting up and knocking down your business goals, one after the other.

But don't worry - it doesn't end there! As long as you're a Keap Customer, Keap's award-winning Support Team will be here to assist. You can learn at your own pace with our Keap Academy Team, and if you ever want more done-for-you assistance, you can also check out our Membership Services and our Keap Certified Partners.

## Common FAQs

### What are the benefits of Keap's implementation services?

- See a return on your investment in Keap more quickly by expediting the strategy and implementation processes
- Identify the most important steps to achieve your primary business goals using the software
- Execute a sound business automation strategy for your growing business
- Transition your team to Keap with as little downtime as possible using our done-for-you services
- Get comfortable using the software with one-on-one guidance laser-focused on your goals
- You'll get optimal results by working closely with your Implementation Strategy Manager and following all the steps, so be sure to engage fully on all the calls.

### What if I need additional support from Keap?

We are dedicated to your success, which is why your Keap subscription includes live customer support, a dedicated Customer Success Manager, and access to Keap Academy for ongoing support and education. You also have the option to purchase additional coaching and done-for-you services through our Professional Services packages, or work with one of our Keap Certified Partners.

### What if I didn't get an Implementation Package - can I still get one?

Our Implementation Packages are for any of our new Customers who are just starting out with Keap. If you're more established as a Keap Customer, don't worry - we can still assist! Talk with one of our Experts to learn how we can best serve your needs.

### What if I need an additional Import Service? Or a more 1:1 Recreation time?

Don't worry - we can always add on what you need to get you transitioned over to Keap! If you're already in contact with your Sales Associate or your Implementation Team, just let them know what you're looking for. When in doubt, our Support Team is also here to assist with next steps.

### How do I get in contact with my Success Manager?

Your Success Manager will reach out after your purchase, but if you still need help our Support Team is able to assist with getting you in contact with anyone on your Implementation Team.

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