Optima™

SERVICES AND SUBSCRIPTION PLAN

SERVICES		Description	Rate
System Set-up **(select one)**	☐	Data Conversion – Standard (includes 20% discount)	$2,800
	☐	Data Conversion - "Fast Start"	$2,300
	☐	No Data Conversion – Implementation only	$1,500
Training		Webinar – 8 hours	$375

SUBSCRIPTION PLAN		Description	Monthly Rate
Program Size – Total Users **(select one)**	☐	1-25	$90
	☐	26-99	$150
	☐	100-199	$200
	☐	200-299	$250
	☐	300-399	$325
	☐	Unlimited	$400
Subscription Term		1 year	
Billing Frequency **(select one)**	☐	Annually	
	☐	Quarterly	

Bill To:

CASA Program _____

Contact Name _____

Address _____

City, State, Zip _____

Email _____

Phone _____

SIGNATURE _____ DATE _____

OPTIMA SERVICES

Data Conversion

Two options are available for a complete migration of your legacy CASA data system to Optima.

<u>"Fast Start" Data Conversion</u> – If you have used your legacy software as-is without modifying its functionality or data fields and are anxious to get started using Optima, your data can be converted straightforward into Optima. This will get you started FAST, eliminating 3-4 weeks of conversion time.

<u>Standard Data Conversion</u> – If you have modified your legacy software, added/changed data fields or software usage, or want more time to review data conversion results, we will do the conversion in two phases:

1. Collect your data, then work with you to review and analyze it to develop a clear understanding of its content and current usage. We map it to the Optima format and develop custom software to convert it. After the conversion, we review the results with you for accuracy and user sign-off.

2. Collect a final version of your data, apply modifications (if needed) and run through the conversion process again to migrate it to your Optima database.

Implementation

Implementation services ensure that your Optima system is up and running successfully! If you have no data to convert or choose not to convert your legacy data, this is the best choice to get started. We work closely with you to clearly identify the steps to "Go Live" with Optima, agree upon a realistic timeline and execute the plan.

Training

Training services will fast-start your success and are essential to getting the greatest value from Optima. Training is provided to all levels of users, including volunteers. Hosted by webinar, our trainings are designed so your users get the most out of Optima.

Custom Reports

Optima includes several hundred reports, but if you have special reporting needs, we will work with you to create them. Each report is evaluated for the level of complexity and service fees range from $150-$300 per report.

Customer Support – Included with ALL Optima Subscriptions!
Available 9am-5pm Monday-Friday, plus 24/7 Online Help Tickets

You will always talk with an Optima expert who understands how Optima can best be used to achieve your goals. We pride ourselves on quickly resolving your questions and helping you establish Best Practices for your program. We value and encourage your suggestions to make Optima even better!