QuickStart Service

Your CRM solution is a crucial investment for your company. We understand the importance of quickly putting that investment to effective use. With our QuickStart services for Salesforce.com we will help your company realize immediate results from your SFDC investment. QuickStart caters to the specific requirements of your business. Our consultants will work with your business team to develop a solution that addresses your core objectives and creates instant success.

The QuickStart Salesforce.com service offerings are for customers who want an immediate return on their investment quickly and efficiently. QuickStart offerings are for small to mid-size businesses or non-profit organizations where the user base is typically less than 100 users. We will assist your organization in getting a 'quick start' with Sales Cloud, Service Cloud or Non-profit Starter Pack. Depending upon edition, QuickStart packages typically including the following functionality (depending upon your edition):

Sales Cloud QuickStart

- Lead Management Configuration
- Contact and Account Management Configuration
- Opportunity Management Configuration
- Custom Object Development (for functionality not available in SFDC)
- Report and Dashboard Development (5 Reports and 2 Dashboards, four Components each)
- HTML Email Communication Templates (1 Letterhead and 3 Email Templates)
- Data Migration of Leads, Accounts and Contacts (1 Single source Excel File each for Lead & Accounts / Contacts)
- 2 hour Training Session with your users
- 2 hour Handover with your System Administrator

Service Cloud QuickStart

- Contact and Account Management Configuration
- Case Management Configuration
- Assets, Contracts Management Configuration
- Custom Object Development (for functionality not available in SFDC)
- Report and Dashboard Development (5 Reports and 1 Dashboards, four Components each)
- HTML Email Communication Templates (1 Letterhead and 3 Email Templates)
- Data Migration of Leads, Accounts and Contacts (1 Single source Excel File each for Lead & Accounts / Contacts)
- 2 hour Training Session with your users
- 2 hour Handover with your System Administrator

Non-profit QuickStart

- Use of SalesForce Non-Profit Starter Pack
- Donor Management Configuration - Donations, Donation Management, Recurring Donations, and Memberships.
- Household Configuration
- Report and Dashboard Development (5 Reports and 1 Dashboard with up to four components)
- HTML Email Communication Templates (1 Letterhead and 3 Email Templates)
- Data Migration of legacy Donor, and Donation Data (1 Single source Excel File each Accounts / Contacts and Donations)
- 2 hour Training Session with your users (train the trainer)
- 2 hour Handover with your System Administrator

If you plan to have a SalesForce administrator in place we will work with them to ensure that they are trained, capable and able to assume day-to-day operations of your implementation. In addition, we brief them on what was done during the Quickstart and hand over the Requirements and Design documentation to help them manage the application.

Note: Quickstart services are for basic deployments that depended heavily on the best practices native to SalesForce functionality. QuickStart programs do not include complex customization, forecasting, complex workflows, multiple source data migration and cleansing, contract, entitlements, or complex reports and dashboards. Quick Start packages assume that users require standard security roles and profiles.

Sample Plan

Pre Project	Two-hour project kick-off call to plan and coordinate
Day 1	Business Process Review
Day 2	Design Quick Start Organization setting, Users, Profiles, Roles Customize standard objects
Day 3	Customize standard objects Customize custom objects Client Review / Rapid Changes (minor adjustments)
Day 4	Reports Dashboards Data upload Client Review / Rapid Changes (minor adjustments)
Day 5	Client Review / Rapid Changes (minor adjustments) End user training / Administrator transition
Pre Project	Two-hour post- project review

Benefits

- Tailors the Salesforce CRM solution to your unique organizational requirements
- Prioritizes your most important organizational and management needs
- Enables you to get up and running on Salesforce CRM in only one week
- Provides details about best practices allowing you to further optimize features on your own in the future

Deliverables

- Requirements gathering, summary, and project management
- Application customization including user setup, workflow processes, communication templates and custom reports
- Data importing
- End-user training

Pricing

The fee for the 1 week Salesforce.com Quickstart is $6,000.00 plus expenses