Sevant Group

Sales Cloud Mid-Market Quick Start

Congratulations on choosing the world's premier CRM, trusted by Fortune 500 companies for its usability, security, automation, and insights. The next step is getting you up and running quickly to take advantage of all Salesforce has to offer.

Sevant's Sales Cloud implementation Mid-Market program is designed to do exactly that. Our certified specialist will empower you to leverage your investment in Salesforce in just three weeks or less with this pre-packaged offering that includes training and sets a solid foundation for your organization.

Once you are set up, Sevant's team can help you execute your longer-term roadmap to better engage with your customers.

How Sales Cloud Mid-Market Quick Start Works



Project Kick-Off | Object & User Configuration | Lead & Cadence Management | Account & Contact Management | Opportunity & Quote Management | Automation & Flow | Reports and Dashboards | Training & Go Live

The Details

Price

$45,000 One-Time fee: up to 250 hours delivered by your expert(s)

People

- **Sevant:** Certified Salesforce Specialist(s)
- **Customer:** Key Stakeholder / Decision Makers. Subject Matter Experts (the person that knows your business the best), Salesforce Admin (the main person who will manage and maintain your Salesforce environment), Project Manager

Prerequisites

- Customer to provide courtesy/temporary login access
- Customer will provide business overview and configuration requirement overview
- Customer will allocate 24-30 hours of meeting time with Sevant resources
- Up-to-date Gmail, Outlook 365 Servers, and Browsers
- Customer to provide an internal project manager with access to Sevant Project Portal

The Deliverables

In Scope

- Configured Sales Cloud environment
- Setup of up to 10 Profiles & up to 40 Users
- Configure Lead-to-Quote Business Process (Lead, Account, Contact, Opportunity & Quote Management)
- Up to 6 Custom Objects with up to 100 fields
- Enable Lightning Features such as Home Page, Path, Guidance for Success, Kanban, Lead Assignment
- Up to 6 Custom Automations with 5 or less elements
- Create 10-14 Reports & 4-6 Dashboards
- Advanced Duplicate & Matching Rules
- Salesforce Inbox Setup with Sales Engagement
    - Up to 5 Custom Cadences with 5 steps
- 5 two-hour Train-the-Trainer session

Optional Add-Ons

- Deep Dive Business Process Review
- Data Migration & Data Importing
- Advanced Process Automation - Approvals, Integrations, Flows
- Advanced Features i.e. Products, Pricebooks, Quotes, Flows, eSignature, Sales Engagement, Forecasting
- Custom Code (e.g. Apex Triggers, Apex Code, ScreenFlow, Lightning Web Design)
- End-User Inbox Training
- Lightning Sync, Einstein Activity Capture, AI for Sales Cloud, AI for Service Cloud