ComeliteCloud

# SALES CLOUD QUICK START

salesforce registered consulting partner

## Why Salesforce CRM?

With Salesforce, you get more than just the world's #1 CRM platform. You also join 150,000+ like-minded companies and find a massive community of experts and evangelists committed to your company's growth.

- Close More Deals
- Get More Leads
- Accelerate Productivity
- Make Insightful Decisions

With Salesforce, you can work smarter, connect better with customers, sell more, and grow your business faster. But before you start closing more deals, you must get your business set up in Salesforce.
Salesforce offers a customizable platform that can grow with your business. Salesforce stores critical information about your customers and helps you connect and close deals with new customers. You can modify the Salesforce platform to reflect how your company does business. You can add new features as you grow, so that your information system is always the right size for your business.

# Getting started with a full CRM system has never been so simple.

We deploy a fully functional system that provides you with the tools to get started using Salesforce. We help you Close deals faster and grow accounts by getting up and running quickly on Sales Cloud.

Quick-Start implementations are often the best way to quickly get started with the Sales Cloud CRM. This helps to implement a major feature for optimizing business performance, and you'll start seeing a return on your Salesforce Sales Cloud CRM investment as soon as possible!

## Are you new to Salesforce CRM, or are you an existing customer that is struggling with how Salesforce is configured?

If you're new to the cloud and CRM, initially we'll help you to understand the core capabilities of Sales Cloud. Then, our Specialists will walk through the best practices for Sales Cloud, showing you how to setup and use Leads, Opportunities, Accounts, and Contacts.
If you are already using CRM, then your business processes will be reviewed on how best to optimize them using Salesforce. Our Certified Experts rapidly adjust and memorize your sales process, and then comprehensively customize the Sales Cloud to meet your business needs.

## Core Implementation

Completion Timeline:
One Month
$4000

**Launch into the Cloud rapidly with a core Sales Cloud system deployment**

- Business Process Workshops
- Requirements List & Design Document
- Salesforce Org Configuration
- User Configuration, basic sharing and security
- Standard Reports & Dashboards
- Leads, Contacts and Accounts
- Simple Validation Rules
- Fields/Page Layout/List View Customization
- Lead Capture from your website and automatically assigned to the right sales staff
- 30 Days Helpdesk Support

## Extended Implementation

Completion Timeline:
Two Months
$7000

**Extend and customize your Sales Cloud instance for campaign and opportunity management**

- Business Process Workshops
- Requirements List & Design Document
- Salesforce Org Configuration
- User Configuration, basic sharing and security
- Standard Reports & Dashboards
- Leads, Contacts and Accounts
- Simple Validation Rules
- Fields/Page Layout/List View Customization
- Lead Capture from your website and automatically assigned to the right sales staff
- Record types
- Campaign Setup with HTML template
- Opportunity
- Two Custom Workflows or Approvals
- 30 Days Helpdesk Support

## Additional Features

- Chatter setup
- Create a custom branded home page
- Custom Object Development
- Create Quote Template & Price Book
- Set Up 50 Products/Services
- Outlook or Gmail Integration
- Data Migration
- Sales Forecasting
- Web-to-Case and Assignment Rules
- Sales Console
- Advanced reports and dashboards
- Sales Automation

## Helpdesk Support

After project delivery is complete, we will provide 30 days' free helpdesk support, including tweaks to your implementation. This ensures that you get exactly what you want, without being concerned about the meter running every time you have an issue or wish to make an adjustment.
We continue with our clients, developing long term relationships. This ensures that as your company grows and evolves, your Sales Cloud CRM implementation will too. We will handle administration, customization and configuration of the Salesforce Sales Cloud so you can focus on growing your business and doing what you love.
Let us handle this challenging part of business management, so you can utilize your personal resources better!

## The Workshop

During the initial stages of the project, Comelite Cloud will hold a number of scoping workshops to clarify the business requirements and objectives. The workshops engage a number of stakeholders from across the business including; Sales, Retention, Professional Services, Marketing, Project Management, Customer Service and Finance. During the workshops, information are gathered on specific requirements and how they aligned to the business objectives of:

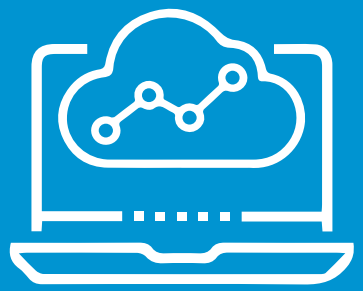
1. Increasing sales conversion rates
2. Delivering accurate, real-time reporting more efficiently
3. Increasing revenue potential
4. Building a system that would facilitate the growth of the business

Once the requirements were identified, Comelite Cloud present it. During this workshop stage, it was evident that both companies had excellent cultural alignment and fit and were well suited to work together.

## How it works / Our Approach

### Discovery

Our Specialist will review with you your business and sales processes to uncover your use case.



### Delivery

- Review how Sales Cloud helps you build customer relationship.
- A walk through of the value and use of the core objects in Sales Cloud - Leads, Opportunities, Accounts and Contacts.
- Configure your sales stages in Salesforce.
- Learn how to use list views, page layouts, and custom fields to customize Salesforce Sales Cloud.

### Outcomes

This accelerator provides you with:

- Fast Sales Cloud ramp up to get you up and running with out-of-the-box
- functionality
- Provides you the fundamentals of customizing salesforce for successful
- Adoption

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