



# PK Product Packages

Whether it's implementation, integration or custom development, **we can help.**

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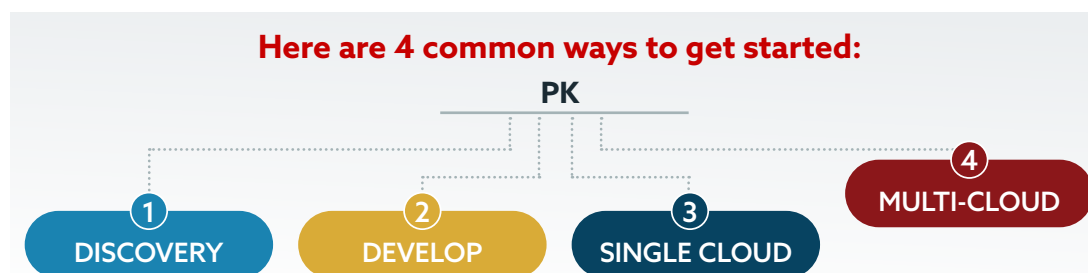
## PK Package

With every project, we realize it takes more than technology to drive real change. You have to identify the problem areas, create repeatable, scalable processes and most importantly, get your people trained and on board.

At PK, we've got 10+ years of experience in Salesforce and Automation consulting and custom development. Our experts can offer the stability, scalability, experience and holistic approach your company needs with a boutique, personal touch that ensures you're never a number.

We've perfected our approach and methods with every new client and we know where companies are likely to stumble. Let PK guide you around those pitfalls, around common hurdles and on to success with the knowledge we've gained over years of experience and hundreds of happy clients.

If you want to apply this to your company, simply select from the options here. Unsure what you need?



## 1 PK Discovery

Our most popular service offering, PK Discovery gives you the foundation you need to move forward. Our clients refer to this as their “blueprint” and it’s generally best for those who know they’re going to scale rapidly and need a technology and process strategy in order to do so. A paid initial discovery process that provides incredible insight and value to your company’s inner workings and how to connect siloed departments and technologies.

### What you get with PK Discovery:

- ✓ **Discovery and Transformation:** In these sessions, your specially selected PK team will work with internal stakeholders to uncover business issues, define process breakdowns and assess your technology stack. These serve as both an exploratory exercise and valuable consulting for your team.
  - ✓ **Custom Discovery and Transformation Blueprint:** This evaluation is unique to your business and helps streamline and simplify what tools and technology you’ll need for the road ahead. Recommendations on which applications will best serve your end goals are included.
  - ✓ **Discovery and Transformation Strategy:** We all want to see a radical change in our organizations in order to move forward, and our D&T Strategy is what gets you there. Consider this your plan for the change your company needs. This includes FAQs and time and cost estimates.
  - ✓ **Framework and Method Assessment:** In this important part of the PK Discovery Process, one of our development experts walks you through various pros and cons of different development frameworks and methodologies. Together, your stakeholders and the PK team select the right one for your company, project, and team.
  - ✓ **Cost and Time Calculations and Requirements:** From creating a viable budget to ensuring you have the people you need when you need them, this is an invaluable estimate that comes with the PK guarantee.
- The PK Discovery package is critical for establishing a strategy for forward movement and nearly always kicks off our most successful client relationships.**

If you’re serious about implementing real change in your technology foundation and maximizing ROI from your CRM or Salesforce platform, this is where to start. This package is a great entry point if you have no audit or assessment of what you need for your business to run in the cloud. The PK Discovery package can be used for sales strategy, marketing strategy, or total cloud transformation (Lead-to-Cash).

## 2 PK Develop

Our PK Develop clients are wildly productive with faster implementation times, lower costs and constant support from a world-class team of developers. Many of our clients have the staff, requirements and expertise required to steer their own custom development projects, but that’s not always the case. If you need an expert team to create your custom business environment, or app from the ground up, we have you covered. Often, our clients will use the PK Develop package to define and evaluate their existing set of requirements. Instead of forcing the wrong application into a business process, we create both technology builds and process changes.

### What you get with PK Develop:

- ✓ **Application Development:** Don't put this business-stopping burden on your internal stakeholders. Allow us to get the project up and running, faster than you ever thought possible. We build applications in a variety of platforms, including Salesforce Platform (force.com), Heroku, Pardot API development, .NET, Java, Apple iOS mobile, Android mobile, and Salesforce Mobile SDK.
- ✓ **Application Integration:** One of the quickest ways to increase software ROI is through integration. We provide integrations

through middleware tools like Dell Boomi, Jitterbit, Mulesoft or through custom API development.

- ✓ **Application Maintenance:** At PK, we believe in our custom development projects and in our clients. That's why we offer application maintenance to ensure your project continues to drive ROI and serve your company's goals, now and in the future.

The PK Develop package takes a process that can take companies months or even years, and reduces it to a fraction of that time, freeing your internal talent to focus on their jobs. Building custom functionality for your own company can often result in a hodgepodge of disparate apps and processes. By combining **Discovery** and **Develop**, our clients vault over these all-too-common hurdles, and fasttrack the ROI of their business technologies and processes. Sound like more than you need? Here are some of our products that can be completed in just a few weeks and will provide incredible value to your processes, people and technology.

## 3 PK Implement: Single Cloud

Our PK Implement: Single Cloud clients enjoy an accelerated path to implementation for any of the core Salesforce products. In our work with hundreds of clients, we have refined proprietary processes to speed your implementation and time to ROI. Our consultants have a range of business and technical capabilities to get you up and running fast.

### What you get with PK Implement: Single Cloud

- ✓ **Technical Requirements:** Bringing your vision to life requires a robust requirements documentation process. Let us handle the technical details.
- ✓ **Solution Design:** PK solution design takes all possible situations into account before presenting you with a solution design you can count on to flex and scale with your needs.
- ✓ **Configuration and Development:** When possible, PK consultants will use standard configuration to make your vision come to life. We also have a world-class team of developers who can assist with more advanced automation and custom requirements.

- ✓ **Implementation:** Launching your new cloud solution is an exciting time. We'll make a transition plan for your data migration, user enablement and cutover from your old system.
- ✓ **Training:** As much as possible, we want you to take over the internal administration of your new cloud solution. We customize training packages to best-fit your internal capabilities and unique environment.
- ✓ **Solution Maintenance:** Many of our clients enjoy monthly support and roadmapping packages to always stay ahead of what's coming next with their Salesforce cloud product.

## PK Implement: Single Cloud Product Areas

- **Pardot, HubSpot, Eloqua, Marketo**
- **Marketing Cloud**
- **Social Studio**
- **Sales Cloud**
- **Salesforce CPQ**
- **Service Cloud**
- **Community Cloud (customer and partner Web portals)**
- **AppExchange Product Implementation**

The PK Implement: Single Cloud package accelerates the time it takes to implement your product while freeing your internal talent to focus on their jobs.

## 4 PK Implement: Multi-Cloud Transformation

PK Implement for multi-cloud transformation delivers you a world-class business technology platform from “lead-to-cash.” Our proprietary methodology for building fully integrated systems, teams and processes is unparalleled in the Salesforce partner system, and we have greatly streamlined the ability for businesses to get up and running fast with multiple new cloud products.

### What you get with PK Implement: Multi-Cloud Transformation

- ✓ **Technical Requirements:** Bringing your vision to life requires a robust requirements documentation process. Let us handle the technical details.
- ✓ **Solution Design:** PK solution design takes all possible situations into account before presenting you with a solution design you can count on to flex and scale with your needs.
- ✓ **Configuration and Development:** When possible, PK consultants will use standard configuration to make your vision come to life. We also have a world-class team of developers who can assist with more advanced automation and custom requirements.
- ✓ **Implementation:** Launching your new cloud solution is an exciting time. We'll make a transition plan for your data migration, user enablement and cutover from your old system.
- ✓ **Training:** As much as possible, we want you to take over the internal administration of your new cloud solution. We customize training packages to best-fit your internal capabilities and unique environment.
- ✓ **Solution Maintenance:** Many of our clients enjoy monthly support and roadmapping packages to always stay ahead of what's coming next with their Salesforce cloud product.

This package will bring your company into a fully integrated ecosystem. Salesforce's native applications share data in real time so all departments can access an up-to-date, comprehensive view of the customer. This helps reduce process inefficiencies while opening new reporting capabilities like account health scoring.

## PK Sales+

You have Sales Cloud CRM but not a whole lot of ideas on how to make your internal platform look like the demo. Surprise! You need automation, customization, training or optimization. Which one sounds like you?

### Problem

I have Sales Cloud but don't know how to use it!

### Answer

**Customization:** Before you start importing all your lists and cluttering up your system, let us set up a digital mirror of your sales process.

### Problem

I need to do more with Sales Cloud to justify my investment.

### Answer

**Optimization:** Is your instance of Salesforce simply a glorified Rolodex? Wondering why you spent all that money on something we used to call a notebook?

### Problem

Something is not working and I don't know how to fix it.

### Answer

**Training:** Stop allowing a simple lack of training to impede your sales team. Get the training you need to get and keep the ROI of Sales Cloud high.

### Problem

I want to automate more of my business processes but don't have the time.

### Answer

**Automation:** Get your time back with expert assistance. We can make your business processes more seamless than ever and show your team how to keep the leads flowing.

## PK Sales+

PK Sales+ is created for those who want to get the most out of their CRM system. Many of our clients want a next-generation, customer centric and growth-driven sales plan that aligns with their marketing goals, technology parameters and unique needs. The PK Sales+ package provides 100 hours of consulting, data analysis, configuration and training delivered over a 90-day timeframe.

### Our certified Salesforce consultants are on hand to review:

- Data quality and architecture
- Reports and dashboards deficiencies
- Sales process and alignment of people and technology
- Right number and type of licenses
- Standard objects and features correctly utilized
- Underutilization of available features
- Workflows and process automation
- Recommended AppExchange solutions to solve critical issues

## What you get with PK Sales+:



**Deep-Dive Analysis:** We'll explore your lead flow, business model and strategy to determine how to configure your system for maximum sales efficiency. Our team will go beyond technology to people and process optimization to ensure your new strategy is baked into your culture.



**Strategy Sessions:** These in-depth, focused conversations reveal your biggest hurdles and we work with your team to overcome them. Our certified consultants will create a custom optimization plan and process flowcharts to keep the outcomes of your sessions fresh and top of mind.



**Evaluation and Recommendation Report:** Our findings and custom evaluations are filed in a 5-page document and once approved worked into a high-level project plan for future

roadmap progression.



**System Configuration and Training:** PK configures standard and custom objects, drawing on the Evaluation and Recommendation Report. This comes with a custom sales performance dashboard and is followed by 4 1-hour training sessions.



**Post-Configuration Support and Sales Playbook:** PK will provide support assistance for technical questions and adjustments for two weeks after launch and all clients will receive a complimentary copy of our "Sales and Marketing Reports Playbook," designed to accelerate your team's ability to report and take action on the right metrics.

The PK Sales+ package has the power to transform your organization from piecemeal sales efforts, disconnected from your technology and people, into a seamless lead to cash process. Go from disorganized and frustrated with your CRM and Sales performance to a completely configured system and trained team.

## PK Marketing+

You're ready to put your marketing automation into overdrive but your lack of process, knowledge or employees has held you back. Start marketing to more with less by using Marketing+.

### Problem

This platform does so many things, I don't know who to put where to make the most of it.

### Answer

**Complete automation roadmap:** Get a plan in place and then deploy internal or PK assets to make it happen.

### Problem

I have Pardot... now what? I thought my marketing team would know.


### Answer


**Automation and Integration Optimization:** Build Pardot into the marketing automation platform of your dreams, by integrating it with sales, invoicing and much more. PK will help you create a totally integrated and optimized marketing automation machine.

## PK Marketing+

PK Marketing+ builds your pipeline so no lead goes untouched. Many of our clients have the technology and people they need to have a world-class marketing process, but struggle to connect the dots. Our certified marketing consultants will build an automation roadmap and then work with your internal marketing team to configure your system of choice to your exact specification.

### What you get with PK Marketing+:

 **Consulting Meetings:** PK expert marketing automation consultants will meet with your marketing stakeholders to determine the best system and configuration for your company's unique needs. Our team will analyze your current and future technologies, as well as your people and processes, to create your custom strategy.

 **Optimization Roadmap:** Your optimization plan provides the next steps in your journey with written evaluation and recommendations, process documentation (**for internal**

**implementation is needed**) and a project plan that takes your team through the first 90 days to get your team up and running faster.



**System Configuration:** Our certified marketing consultants will configure your system to your specifications and work with stakeholders to train and coach on the new processes.



**In-Depth Training:** Your people and processes are in good hands with PK. We'll ensure your people are trained to manage your custom implementation and unique environment.

## PK Marketing+ will enable your team to get more value out of marketing automation.

With meaningful data flowing into the platform, you can effectively segment leads and send relevant content. By tying various marketing touch-points to campaigns, you can track the revenue impact of content like emails and landing-pages. This package is designed to identify the gaps in your marketing system while building the skills and processes for long-term success.

## PK Managed Services

PK Managed Services provide ongoing admin. or development support. This package is well suited for clients needing to augment their inhouse capabilities in Salesforce or custom development. Our services fill the gap by assigning a dedicated virtual admin. or by adding a full time consultant to your team through staff augmentation. Managed services packages begin at 100 hours to be used within 90 days.

### Sales Cloud/Service Cloud/Salesforce CPQ

✓ **Discovery:** A dedicated consultant will conduct an analysis of your org, reviewing integrations, custom objects and the overall data structure.

✓ **Support:** A virtual admin will be available to handle requests related to standard object configuration, reports and dashboards, or more complex items like building Process Builders and

Assignment Rules. By working with the same individual, you can trust that the nuances of your org are already understood.

✓ **Integrations:** Make changes to an existing integration with a third-party application, broadening the scope to include more data or resolving technical issues.

- ✓ **Custom Objects:** Build custom objects, Lightning Components or Triggers for additional functionality, or automate business processes.
- ✓ **Experience:** Consultants are Salesforce Certified in Sales Cloud, Service Cloud or Salesforce CPQ.
- ✓ **Staff Augmentation:** A certified Sales, Service or CPQ consultant will join your team full time (6 mo. minimum).

## Pardot/Marketing Cloud

- ✓ **Discovery:** A dedicated consultant will begin with a deep-dive analysis of your marketing automation strategies and system usage.
- ✓ **Support:** Your assigned consultant can assist with building complex nurturing series through Engagement Studio or Journey Builder, designing responsive Email Templates and Landing Pages, tracking marketing ROI through Salesforce Campaigns and much more.
- ✓ **Experience:** Consultants are Salesforce Certified in Pardot or Marketing Cloud and have executed implementations, worked as

end users or lead marketing automation transformations in the past.

- ✓ **Staff Augmentation:** Certified consultant will join your team full time (6 month minimum).

## Custom Applications

- ✓ **Discovery:** A dedicated developer will review your application's features, code, integrations and data structure.
- ✓ **Support:** Your assigned developer will update functionality based on user requests, troubleshoot technical issues and manage integrations.
- ✓ **Release Management:** Changes can be deployed through single-item updates or through a larger release.
- ✓ **Experience:** Developers have prior experience building or maintaining Heroku, .NET, or Salesforce Platform applications.
- ✓ **Staff Augmentation:** Add a full time developer to your team (6 mo. minimum).