

Salesforce Lightning SmartStart

Quick, affordable, fixed-price Salesforce implementation

Our Salesforce Lightning SmartStart is a comprehensive end-to-end packaged implementation service. We will ensure Salesforce is configured and customised so it maps tightly to your unique business processes and your people are properly trained to use the system.

Xenogenix SmartStart implementations are delivered by experienced and accredited Salesforce Consultants. With a predefined scope of work, the SmartStart service allows organisations to start realising the benefits of Salesforce as quickly as possible.

Why use a SmartStart Package?

- Fixed price engagement with a clearly defined scope and set of deliverables
- Guidance and expertise on how to best leverage Salesforce to support your business processes and avoid costly mistakes
- Dramatic improvements in a short period of time
- Tailors Salesforce to your unique organisational requirements
- Higher adoption rate due to instructor led training
- A road map to help your organisation meet its management needs
- Knowledge transfer and Salesforce best practices so that you can further optimise features on your own

Xenogenix improve the way people, processes, and systems work together via a single world-leading cloud platform, so that our customers can compete in a digital world.



What is included in the Lightning SmartStart?

STEP 1: Define business process and configuration requirements:

- Run Business Process and Requirements Workshop to understand CRM objectives and working practices
- Create an interactive electronic process map to define the processes and activities that will run on Salesforce
- Design Salesforce object configuration (Lead, Opportunity, Account, Contact etc. plus Custom Objects)
- Identify automation requirements such as Work Processes, Validation Rules and Web Integration
- Agree the requirements for the security sharing model, Salesforce Reports and Dashboards

STEP 2: Basic Configuration:

- Finalise solution design and review
- Configure Fields, Page Layouts, Search Layouts and Validation Rules for Standard Objects
- Configure Fields, Page Layouts, Search Layouts and Validation Rules for Custom Objects

STEP 3: Complete configuration:

- Set up the Security Model and Sharing Rules
- Create Custom Profiles
- Implement automation agreed during the design (up to 5 Processes or Workflow Rules)
- Install standard Dashboards and Reports

STEP 4: Solution review & prepare training materials:

- Walk through the application with sponsor and process owners, make minor adjustments as required
- Import data*
- Prepare training materials and content tailored to client's needs
- Create Chatter Group and upload training materials

STEP 5: User Training and Go Live:

- Full day on-site end user training (maximum group size of 10)
- System Go Live

After Go Live

When you need help to put the training into practice, we will be on-line ready to receive your help requests for the next 5 days free of charge.

To find out more about our Salesforce implementation services please contact us at:

smart@xenogenix.co.uk or 08456 525 625

www.xenogenix.co.uk

*Complex data migration is not included in a SmartStart. However, small amounts of well formatted data can be imported into Salesforce as part of the project, up to a total of 3 hours.

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