

## Salesforce CPQ SmartStart

Quick, affordable, Salesforce CPQ implementation

**Our Salesforce CPQ SmartStart is a comprehensive end-to-end packaged implementation service. We will ensure Salesforce CPQ is configured and customised mapping it tightly to your unique business processes and your people are comprehensively 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 CPQ 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 CPQ to support your business processes and avoid costly mistakes
- Tailors Salesforce CPQ 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 CPQ 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 CPQ SmartStart?

## **STEP 1: Define business process and configuration requirements:**

- Run Business Process and Requirements Workshop to understand Quote-to-Order objectives and working practices (how you price and send out quotes today)
- Create an interactive electronic process map to define the processes and activities that will run on Salesforce
- Design Salesforce object configuration focusing on each of the major areas of the system such as products, bundles and quote templates
- Identify automation requirements such as Work Processes, Validation Rules and Quote Approval Processes

## **STEP 2: Orientation:**

- Perform installation of the Salesforce CPQ package into Production and create up to 5 profiles
- Create CPQ project Sandbox for implementing the solution and testing/training
- Hold up to 6, hour long orientation workshops (via web conference) each focusing on each of the major areas of the system:
  1. Provide guidance on how to fill the Data Prep Workbook with Customer product data
  2. Provide guidance on how to populate the Data Prep Workbook with bundle data

## **STEP 3: Application configuration:**

- Configure up to 5 Bundles with up to 50 Options, 20 Product Features, and 5 Configuration or Pricing rules.
- Configure up to 2 Discount Schedules, 2 Block Prices, 2 Subscription Prices.
- Enable Quote-level (by %) and line-level (by % or amount) discretionary discounting
- Enabling multi-currency in Salesforce instance, if applicable
- Implement 1 quote template in English, in PDF format, using the Salesforce CPQ standard Quote Template object.
- Provide customer admin orientation

## **STEP 4: Solution review & prepare training materials:**

- Walk through the application with sponsor and process owners, make minor adjustments as required
- Provide assistance during User Acceptance Testing (UAT) for any issues arising from work completed within the scope of the Project. (Note: Customer is responsible for all functional and regression testing)
- Prepare training materials and content tailored to client's needs
- Create Chatter Group and upload training materials

## **STEP 5: Deployment:**

- Migration and deployment of the implemented solution from Sandbox to Production

## **STEP 6: 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**

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