

Rest Easy with FinServ Consulting's Managed Services for Salesforce



With 3 releases a year, staying on top of all the latest features and functions in Salesforce can be challenging. Hiring a full time Salesforce resource can be extremely expensive and is often underutilized.

FinServ offers a cost-effective outsourcing of your Salesforce instance to our certified resources who will ensure you always take advantage of the latest innovations from Salesforce.

How Can FinServ Consulting's Managed Services Help You

Our certified consultants will become an extension of your in-house team, focused on keeping your users happy while helping you get the ROI you're looking for from your Salesforce investment.

When your users have an issue or just need some direction or help, they want the fix or help quickly. Ensuring that an issue, or a simple answer is delivered quickly is at the heart of FinServ's Managed Service offering. We offer several plans with varying response times based on priority of the issue and your preferred turnaround requirements and budget.

At FinServ we not only stay on top of the latest releases for you, but we also focus on how these features can be applied to the unique needs of our financial service client base.

What is FinServ Consulting's Managed Services Offering

Our Salesforce Managed Service offering is unique because we provide a comprehensive set of services providing post-implementation support to evolve your Salesforce Org, meeting the specific goals of your business.

The FinServ approach focuses on a key set of benchmarks that quickly identify any problem areas in your Salesforce instance.

We employ a proactive rather than a reactive approach, creating the optimal UI and user experience through enhancements and automations to ensure your employees are working in a system that best supports their work.

A Service Provider who Understands your Business

FinServ helps cut down the typical learning curve involved with Salesforce projects through deep industry expertise. We also take a white-glove approach to support ensuring your users feel confident in the fact that we won't rest until their issues are resolved. With over 15 years working in the Financial Services industry, FinServ provides a level of business and technical expertise that other Salesforce partners can't touch.

Basic \$800

/ month (billed annually)

FinServ's basic managed services package includes all the core support your organization needs to aid your users including bug fixes, enhancements, key industry benchmarking and a full assessment of your current setup.

The basic package also includes annual release planning and support for critical security and setup updates to ensure your Salesforce instance is running without an issue.

Full Service \$1,200

/ month (billed annually)

FinServ's full service package offers all the features of the basic package, plus Performance Tuning, User Training and much more.

Your users will receive regular enhancements to their user interface and key automations that will make their day to day work less manual and more intuitive.

Our Salesforce experts will work with your IT team to plan out new feature rollouts for each Salesforce release.

Premier starting at \$2,000

/ month (billed annually)

FinServ's Premier package provides continuous improvements to your Salesforce instance with monthly comprehensive reviews of your business process aligned with your Salesforce instance.

We will ensure through monthly checkups and constant updates that your Salesforce Org is running optimally for your users and meeting the key business goals of your organization.



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A plan to fit your organization's needs

Whether you want basic support or a full outsourcing of all your Salesforce environment, FinServ has a plan that will fit your needs. We free up your internal team to focus on their day to day jobs while ensuring your Salesforce instance is completely supported.

Service	Basic	Full Service	Premier
Standard Admin & Bug Fixes / Per			
User Management & Support	√	√	√
Permission Updates (Profiles, Roles, Groups, Permission Sets)	√	√	√
Backup & Recovery	√	√	√
User Issues (Includes Testing & Deployment)	10 hours / month	25 hours / month	Unlimited
Performance Issues (Includes Testing & Deployment)	\$	√	√
Enhancements - use of hours per month can be applied to these enhancements based on client preferences			
Salesforce Org Optimization & Industry Best Practices	√	√	√
Report & Dashboard Development	√	√	√
Interface Enhancements & Streamlining	√	√	√
Automations (Includes Requirements, Design, Build, Test, Deployment)	√	√	√
Data Cleansing	\$	√	√
Data Migration	\$	√	√
De-Duplication Checks	\$	√	√
Simple Development (Triggers, Visualforce Pages/Reports, etc.)	\$	\$	√
Projects	\$	\$	\$
Release Planning			
Salesforce & Industry Benchmarking	√	√	√
Review of Org Setup & identification of changes required for Critical Updates	Annual	Per Release	Monthly
Review of new features and discuss interest in adopting new features	Semi-Annual	Per Release	Monthly
Time Estimates for setup of desired new features	\$	\$	Included
Training			
New User Training	\$	5 / year	Unlimited
New Feature Training	\$	3/ year	Unlimited
Org Checkup - initial assessment included in all subscriptions			
Salesforce Roadmap	√	√	√
Review of Licenses	√	√	√
Review of Users / Roles	√	√	√
Review Security Setup	√	√	√
Review of Code Base	√	√	√
Review of Objects Standard & Custom	√	√	√
Review of 3rd Party Apps	√	√	√
Review Ease of Use/Key Workflows and Business Processes	√	√	√
Identify & Document Quick Wins	√	√	√
Identify & Document Customization & Deployment Approach by Org	√	√	√
Data Quality & Usage Assessment	√	√	√

√ = Included in base user license \$ = Additional fee applies



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