

cloudconsulting | Up and Running | Premium

START WITH BUSINESS REVIEW

- Half-day session
- Jointly map goals
- Output a clear roadmap for success
- \$500 fixed price

INCLUDED SERVICES

- Salesforce.com setup
- Salesforce.com customization
- Initial Training
- 30-day Checkup

OPTIONAL SERVICES

- Cases
- Contracts
- Product Price Books and Quotes
- Existing Data Migration
- Ongoing Support

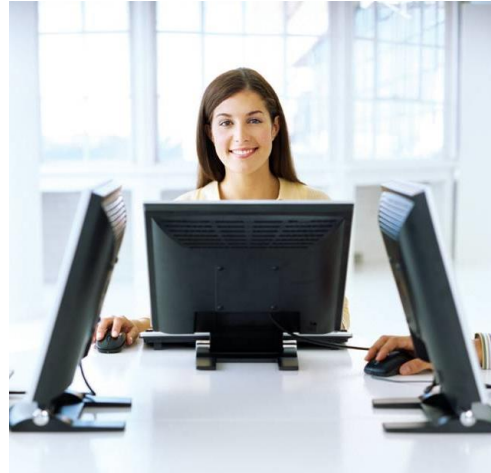
PROJECT TIMETABLE

Up and Running—Premium projects are scheduled in a matter of a few weeks and implemented in 1-2 months depending on scope.

PRICING

Half-Day Business Review
\$500

Up and Running—Premium engagements **\$14,995**



Congratulations! You have made a great decision to run your business using salesforce.com, the world CRM software leader. To maximize your investment, leverage the skill and experience of cloudconsulting to get it running.

At cloudconsulting, we are different and better in how we get you up and running on salesforce.com. Here's How.

Unlike other consulting companies that charge by the hour, cloudconsulting offers fixed price engagements. We do this by engaging with you for a one day assessment where we jointly determine what your needs are. Then we quote a fixed price to get that work done.

This assures you that you get up and running as quickly as possible. And that you know what the costs will be.

Start With Business Review

All cloudconsulting engagements start with a business review. We meet with you for a one-day session where we jointly will map out your goals for salesforce.com and review the business processes that will be impacted such as sales, marketing, and support. The result is a clear roadmap of how to get there and a fixed price from us on what it will cost.

Salesforce Setup & Customization

The Business Review results are used to setup and customize all areas of salesforce.com so you can start using it. Depending on your focus, this could include Accounts, Contacts, Leads, Opportunities, Forecasts, and Cases

Initial Training

We will provide a review of the entire system as configured for you, then train you how to use it in your day-to-day operations. We do this online, but also train in-person when necessary.

30-Day Checkup

After 30 days we schedule an online session where we review where you are on the road to success and help you make any adjustments necessary.

Features List

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PROJECT TIMETABLE

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PRICING

1-Day Business Review **\$500**

Up and Running—Premium engagements start at **\$14,995**

User and Profile Setup

Setup and profile of up to 25 users

Data Security and Sharing Model

Creation and setup of the data sharing model for all included objects and users

Leads

Setup and customization of the Leads object and page layout, custom fields, lead views, assignment rules, and web-to-lead

Accounts

Setup and customization of the Account object and page layout, custom fields, and account views

Contacts

Setup and customization of the Contact object and page layout, custom fields, and contact views

Opportunities

Setup and customization of the Opportunity object and page layout, custom fields, and opportunity views. Also includes mapping Lead fields to Opportunity fields for lead conversion

Campaigns

Setup and customization of the Campaign and Campaign object and page layout, custom fields and campaign and campaign member views.

Reports and Dashboards

Creation of up to 10 reports and 3 custom dashboards

Email Alerts

Creation of up to 10 custom email alerts

Forecasting

Setup of opportunity forecast stages and customized forecast setup

Workflow and Approvals Automation

Up to 3 custom automated workflow with related tasks and alerts

Self-Service Portal

Activation and customization of the self-service portal including matching look-and-feel to your website

Salesforce Mobile

Setup of one salesforce mobile profile

Cases (optional)

Setup and customization of the Cases object and page layout, custom fields, cases views, assignment rules, and email-to-case

Contracts (optional)

Contract object and page layout, custom fields, contract views

Products and Price Books (optional)

Creation of one Price Book with up to 50 products.



tbarber@cloudconsultingllc.com | 847.530.9500