



Salesforce Managed Service



Project Basis

Work with the client to scope a project to deliver a key business outcome

- Defined deliverables
- Specific activities
- Defined timeline

Fixed fee determined based on client business requirements and included scope of deliverables

Retainer

Provide “Air Cover” on a monthly fee basis to assist on implementing the client's business objectives. Work would be mutually agreed based on priorities and focusing on the highest value activities first.

Email, phone call and/or in person working sessions as required.

Fee based on % allocation

Call off Hours

For the client that has most of their operational needs in hand, but need informal access to a seasoned Chief Operations Officer to address issues and hold them accountable

Hourly rate purchased as a bucket of hours up front

Kintyre Consulting Client Experience

Consulting / Professional Services



Financial / Capital Markets



Morgan Stanley



Government



Manufacturing/Logistics



Digital Media



DLAST FOCIUS

Energy



KantataSX / Salesforce



TRACE3



SYNOPSIS



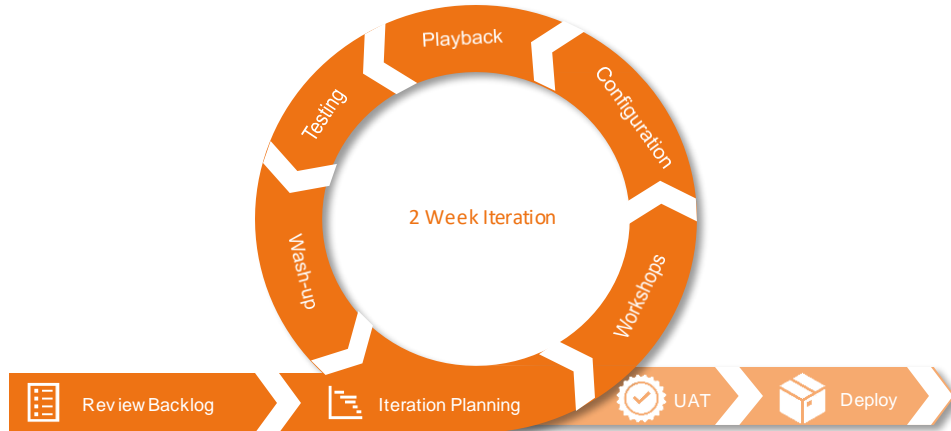


- Robert specializes Program and Operational delivery and has thirty years of experience helping clients solve challenging problems through the creation of business strategies, operational process and organizational reengineering, and the application of technology to solve critical business issues.
- As a consultant Rob offers services in project management, requirement analysis, facilitation, business and IT strategy, and application delivery. In addition, Robert has been a leader in the Program Management discipline, developing and enhancing tools and processes around Agile Methodology and training teams on the use of Agile.
- Over the last several years, Robert has focused on helping large and small clients design and implement solutions in the areas of capital markets, global risk and compliance, business intelligence, workforce planning, and business and IT strategy.
- Most recently Robert the North American Delivery Lead for GFT and was responsible for the rollout of the enterprise Professional Services Automation solution and change management.
- Robert began his consulting career working for Sapien and spent nearly eleven years with the firm. Prior to Sapien Robert worked with NCR Global Information Systems within item image processing software development and quality assurance.
- He earned a bachelor's degree in systems design engineering and a bachelor's of arts degree from the University of Waterloo as well as has a Masters in Business Administration from Athabasca University.

Salesforce and KantataSX Experience

- Robert McGeachy was head of Delivery for GFT, and part of leadership team responsible for rolling out KantataSX (Kimble) globally, and has been using KantataSX since 2016
- Delivered KantataSX training to over 600 users globally
- Salesforce and KantataSX reporting expertise
- Business and functional lead for 15 KantataSX clients: big river technologies, esri Canada, Acquis, Clark Construction, Automation Anywhere, Coanda, CSA, Extreme Networks, HERE, Inspro, Netrix, Registry Partners, Synopsis, Trace3, and West Monroe Partners.
- Salesforce certified partner, and Salesforce Administrator, Platform Developer, Process Automation, and Associate certification
- Extensive experience configuring and customizing additional capabilities to solve unique client business requirements with KantataSX and Salesforce

To deliver rapidly and to focus on most urgent/important activities first, we propose an agile/iterative approach



Iteration Planning

- Decide the Focus and Scope of the Cycle
- Review / Design the 'To Be' processes for the areas in Scope

Workshops/ Deep-Dive Training

- Hands on discovery focused on the areas and processes in the Cycle

Configuration

- User Story Implementation in Sandbox

Configuration Playback and Testing

- Demonstration of User Stories in Sandbox
- Project Team testing of the updated functionality

Iteration Review and Sign Off

- An opportunity to review the configuration based on completed user stories

Deploy

- Push changes to Production

Thank You

For additional information:

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