



# Evolve Support Service Offering

October 2023

CONFIDENTIAL

# Contents

- Enable Consulting Overview
- Consulting Practice and Solutions
- Support Service Offerings

# Enable Consulting Overview

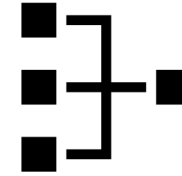
*A Systems Engineering Consultancy that Specializes in CRM*



**Customer  
Relationship  
Management**



**Digital  
Transformation**



**Systems  
Engineering**

**salesforce**



**Microsoft**

# What We Do

***Boutique consulting with proven experience in the Salesforce and Microsoft ecosystems, in addition to custom solutions***

## CRM

- Product Implementations
- Lead-to-Cash Processes
  - ❑ Marketing
  - ❑ Sales & Maps
  - ❑ CPQ
- Service Transformation
  - ❑ Service
  - ❑ Contact/Call Centers
  - ❑ Field Service
  - ❑ RMA
- CRM as a Platform
- eCommerce
- Analytics and AI

## Consulting

- Enterprise Architecture
- Systems Analysis
- Quick Starts and Assessments
- Business Requirements
- Program/Project Management
- Project Delivery
- System Integration
- Competency Enrichment
- Change Management
- Training

## System Engineering

- Architecture and Design
- Development – Web & Mobile
- Cloud Platforms
- Platform and App Integration
- Reporting and Analytics
- Migrations and Data Conversion
- Support and Maintenance Services



salesforce

# Salesforce Consulting Practice

*Building Cost Effective, High-Quality Solutions, Tailored to your Business*

## **Local consulting with global reach and access as a Prolifics Company**

- 20 years of experience
- 165-person team global team with a focus in North America and offshore offices in India
- 1,000+ overall projects
- 225+ Salesforce implementations
- 65+ certifications
- Experts in complex system integration

## **No project too small or too large for our team**

## **Expert focus on complex solutions and integration**

- Lead-to-Cash
- CPQ
- Field Service
- RMA

## **Strong industry experience**

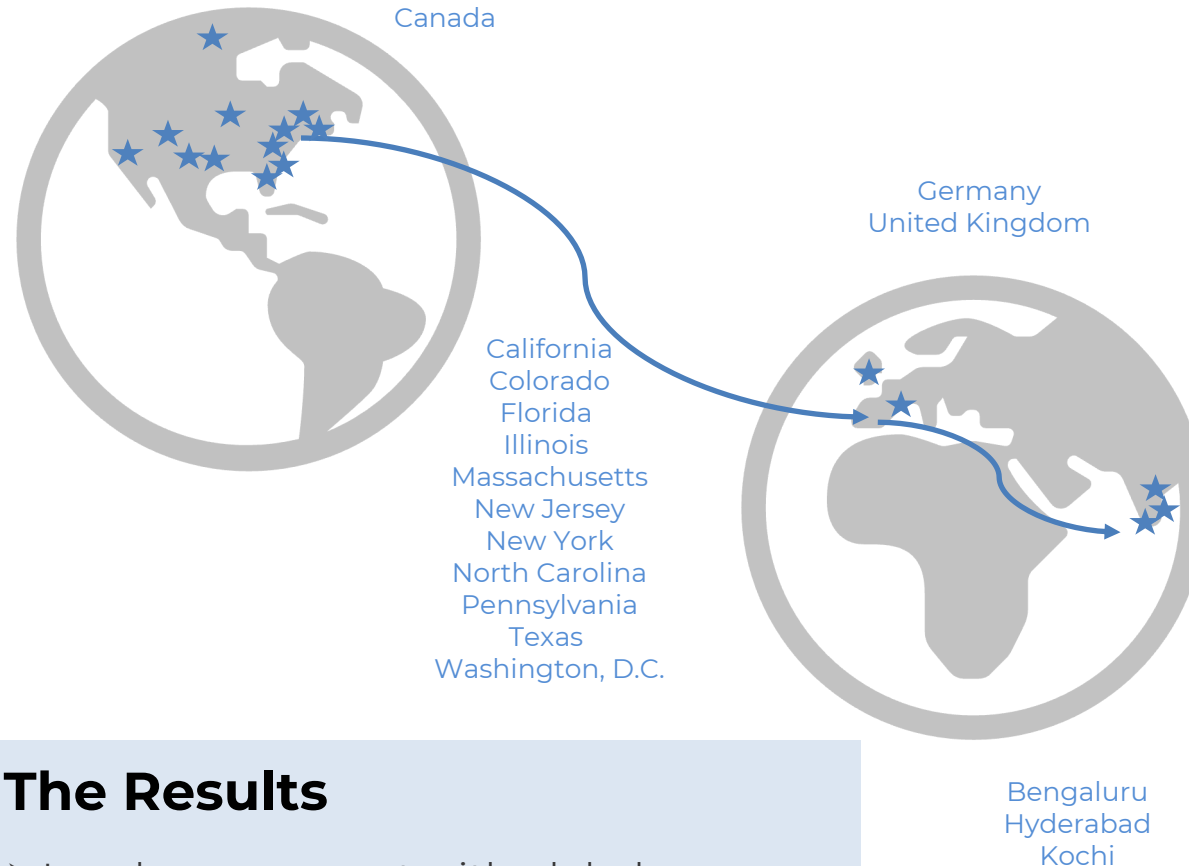
- Healthcare & Life Sciences
- Manufacturing
- Non-profit
- Energy & Utilities
- Financial Services

# People and Locations

## *Solutions Delivered by Hybrid Teams*

### **Local Consulting. Global Delivery.**

- Projects led by US-based, client facing onshore team
- Our offshore team's experience and capacity allows us to meet project demands
- High-quality solutions resulting from leadership and experience
- Flexible delivery model – Agile, Hybrid Agile, and Waterfall



### **The Results**

- Local engagement with global delivery
- Offshore delivery with a cost efficient, time sensitive approach
- Unwavering attention to quality

# Salesforce Clouds



- Customer 360
- Sales Cloud
- Service Cloud
- Field Service
- Platform
- Experience Cloud (Communities)
- CPQ
- Billing
- Maps
- IoT

## Salesforce Core Platform

- Data Cloud
- Pardot
- Journey Builder
- Email Studio
- Personalization
- Loyalty

## Marketing Cloud

## Collaboration, Integration, & Analytics

- Slack
- Analytics Cloud
- Tableau
- Einstein / AI
- MuleSoft

## Salesforce Industries (SFI)

- Energy & Utilities
- Manufacturing
- Nonprofit Success Pack (NPSP)
- Industry CPQ
- Consumer Goods
- Communications

# Solutions and Service Offerings

## Solution and Value-Based Selling



### Engage

- **Flow:** SCOPE Analysis
- **Show:** Discovery & Demo
- **Know:** Requirements, User Stories, Architecture, & Design
- Situational Assessment
- Program Roadmaps



### Implement

- Implementations
- Integration
- Customization
- Industry Solutions
- Product Focus & Reusable IP
- DevOps, CI/CD & Test Automation



### Evolve

- Post-Production Support
- Subscription Based
- Quarterly, Annually, & Yearly
- Enhancements
- Multiple Models & Levels of Service

End-to-End Digital Business Transformation Solutions



# Evolve Support Offering Overview

- The Enable Consulting Support Service offering model is subscription based
- Support is offered in the following durations
  - ❑ 3-Month as Trial with option to auto-renew
  - ❑ 6-Months with option to auto-renew
  - ❑ 12-Months with option to auto-renew
  - ❑ 2-3 Years
- Includes agreed upon metrics for tracking and mutual success
  - ❑ # of Story Points per Sprint
  - ❑ Specific Deliverable
  - ❑ Specific Timelines
- Is aligned to a designated Support Lead that is Onshore / Nearshore
- Supported by Offshore Architects, Developers, and Testers as defined to meet service levels, metrics, and client specific needs

# Evolve Phases & Scope Details

Support Program Phase	Scope Details
Initiation	<ul style="list-style-type: none"><li>• Define systems to be supported</li><li>• Establish key stakeholders</li><li>• Agreed upon process to define, track, and manage work<ul style="list-style-type: none"><li>❑ Enable provided Ticketing/Tracking system or Client provided</li><li>❑ Escalation Paths</li><li>❑ Established SLA for responsiveness/fixes</li><li>❑ Capture Baselines for SLA</li></ul></li><li>• Define Transition Plan &amp; Timeline</li></ul>
Transition	<ul style="list-style-type: none"><li>• Establish expertise in the systems to be maintained</li><li>• Team onboarding and setup</li><li>• Implement needed support processes, tools, and escalations</li><li>• Identify priority areas and items for immediate resolution</li><li>• Create System Documentation as needed (architecture, design, integrations, troubleshooting guides, etc.)</li></ul>

# Evolve Phases & Scope Details

Support Program Phase	Scope Details
Support & Monitoring	<ul style="list-style-type: none"><li>• Bug Fixes</li><li>• New Feature Development for Enhancements<ul style="list-style-type: none"><li>❑ Typically, less than 3-weeks of work</li><li>❑ Larger efforts may be covered in a separate SOW</li></ul></li><li>• Configuration Updates</li><li>• User Management</li><li>• Permissions and Roles management</li><li>• System Upgrades from vendors (Example: 3 times per year for Salesforce)</li><li>• DevOps Support (Development/QA/Production)</li><li>• End User Questions (Tier 1, 2, &amp; 3 Support)</li><li>• Working with Vendors to raise Cases and drive to resolution</li></ul>

# Project Roles & Responsibilities

## Enable Consulting

Roles	Allocation	Responsibilities
Program Executive	Fractional	<ul style="list-style-type: none"><li>• Fractional resource with overall responsibility for the program.</li></ul>
Support Lead (Onshore)	Full Time or Part Time	<ul style="list-style-type: none"><li>• Responsible for the Support engagement oversight and team leadership.</li><li>• Primary contact for the Client Project Sponsor and Team to communicate status, delivery updates, and schedules/release plans.</li><li>• Leads Enable Support team and program.</li></ul>
Solution Architect (Offshore)	Fractional or Part Time	<ul style="list-style-type: none"><li>• Functional solution leader with deep skill in one or more of the business processes, applications, and modules being implemented.</li><li>• Provides systems analysis and techniques to define solutions to business problems.</li></ul>
Technical Architect	Fractional or Part Time	<ul style="list-style-type: none"><li>• Provides overall technical solution and architecture.</li><li>• Defines technical requirements and processes (coding standards, code reviews, etc.).</li><li>• Responsible for ensure the technical solution meets the needs and is designed correctly.</li></ul>
Developers	Full Time	<ul style="list-style-type: none"><li>• Performs assigned technical design, development, and testing.</li><li>• Responsible for developing and configuring the solutions under the guidance of the Solution Architect and Support Lead.</li><li>• Complete development activities.</li></ul>
Quality Assurance Engineer	Full Time	<ul style="list-style-type: none"><li>• Creates test plans, test scripts, and executes testing.</li><li>• Responsible for regression testing the final solution.</li></ul>

# Project Roles & Responsibilities

## Client

Roles	Allocation	Responsibilities
Project Sponsor	Less than 5%	<ul style="list-style-type: none"><li>• Provides oversight of the customer scope, budget, and resources.</li><li>• Represent Client stakeholders in the performance of the program.</li><li>• Review and approve Enable's recommended solutions or workarounds.</li><li>• Provide access to Client resources (human, financial, equipment and technology, knowledge, etc.) necessary to provide the program services.</li></ul>
Project Manager	5-25%	<ul style="list-style-type: none"><li>• Act as the primary contact for the Enable.</li><li>• Work with the Enable team to identify and prioritize work efforts.</li><li>• Assists in coordinating meetings and in the allocation of customer resources.</li><li>• Responsible for the communication and management of priorities.</li></ul>
Functional SMEs - Business	5-10%	<ul style="list-style-type: none"><li>• Provide feedback and requirements on functional changes.</li></ul>
Data Source SMEs – IT	0-10%	<ul style="list-style-type: none"><li>• Customer IT resource for each data source.</li><li>• Provide data extraction and assist with mapping.</li></ul>
Enterprise/Data Architect – IT	0-10%	<ul style="list-style-type: none"><li>• Provides overview/feedback on any architectural changes that are required.</li></ul>
IT Administrator	0-10%	<ul style="list-style-type: none"><li>• Act as the primary contact for technical support.</li></ul>

# Support Deliverables

The following deliverables will be part of this project.

Deliverable	Description
Story Backlog	Backlog of user stories with prioritization.
Business Processes	During the Initiation phase, we will document the high-level systems and workflows that are supported by the system.
Technical Specification	A document that describes the high-level architecture and design of the solution, include object models, key flows, key business logic and security models will be created during the Initiation phase and will be updated as appropriate.
Progress Demonstrations	Periodic demonstrations of the work completed during the support engagement for enhancements.
System Test Scripts	Develop system testing script to cover the applications, integration, and data modifications.
UAT Script Development	For functional changes, Enable will create UAT scripts that client may execute
Source Code	Source code will be maintained in a source code repository.
Deployment to Production	Enable will deploy the changes into Company's Production instance after appropriate testing in lower environments has been completed.
Monthly Reports	Monthly reporting of the metrics.
Quarterly Business Reviews (QBRs)	Quarterly review of the metrics and discussion of priorities for the next quarter.

# The Enable Consulting Advantage

