



Driving value from cloud software

www.cloudroi.com

ABOUT COMPANY

INTRODUCTION



Founded in 2016

CloudROI was founded in 2016 with the core mission of driving value from cloud software.



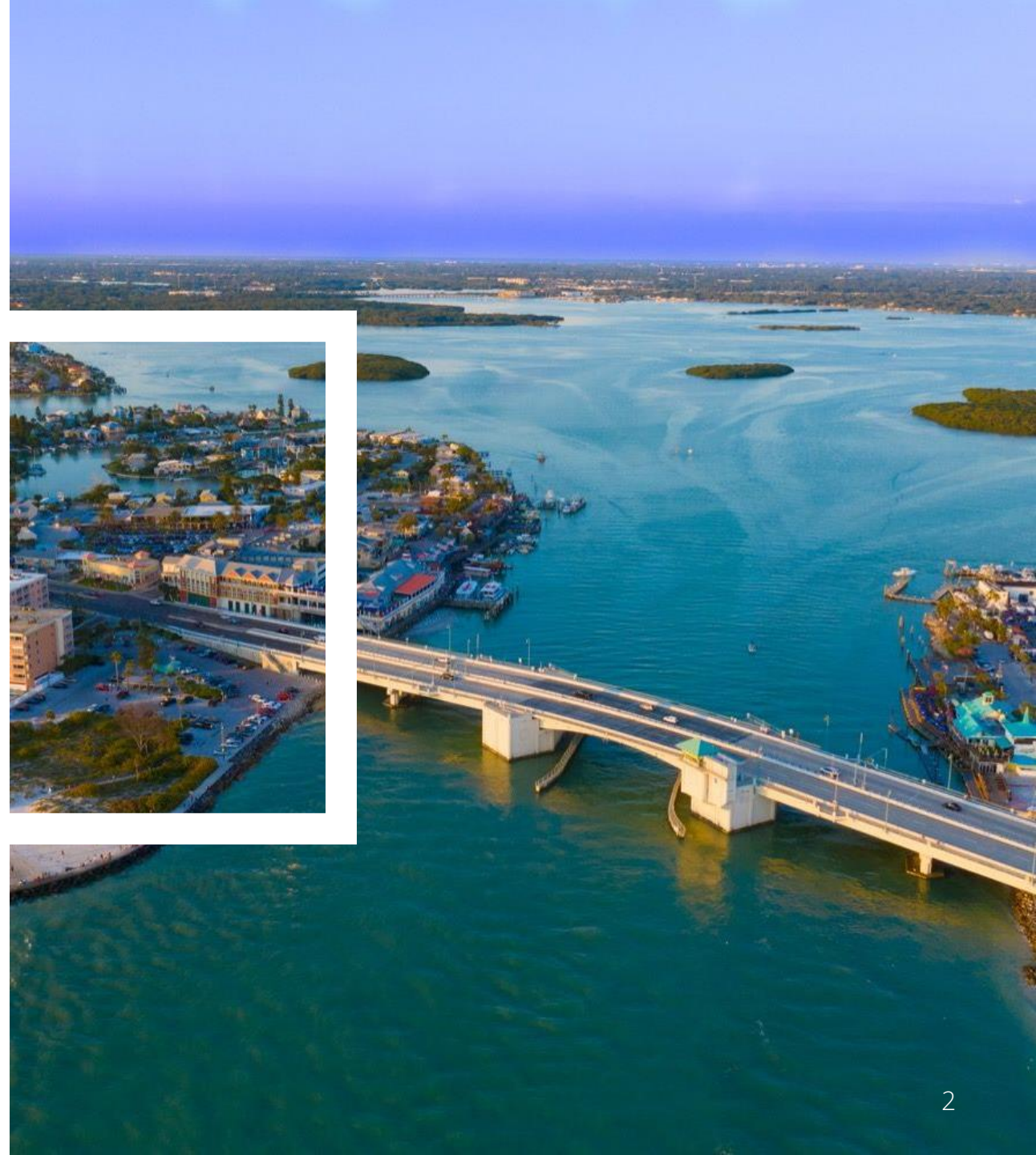
Headquartered in Florida

We are headquartered in Florida with our home office in Madeira Beach, just outside of Tampa.



Operating in 5 countries

In addition to clients in the United States, we operate in four other countries including the UK, Switzerland, Canada and Mexico.



OUR ELITE SALESFORCE CONSULTING TEAM CAN MAXIMIZE VALUE DRIVEN FROM ANY SALESFORCE PRODUCT

OUR REPUTATION



95% Repeat Clients

95% of our clients do repeat business with us, compared to the 40% industry standard



4.98/5.0

Customer satisfaction rating on the AppExchange



80+

Salesforce certifications from Salesforce Headquarters



400+

Completed Salesforce Implementation Projects



Experienced Team

Team of 50 Salesforce Consultants with 5+ years experience



Salesforce Partner

We have been working with Salesforce products since 2016

WHAT WE OFFER

Strategy and Implementation Partner

CloudROI is a Salesforce Consulting Partner with expertise implementing in many clouds: Marketing, Sales, CPQ, Billing, Commerce, Service, Community, Customer Success, ERP, Finance & Accounting, and Nonprofit Success Pack.



Strategy

Let us help you develop a strategy to maximize your SaaS investment and enhance your sales, service, marketing, IT, and analytics with Salesforce.



Implementation

Tailor Salesforce to your business needs and increase adoption with our elite team of implementors.



Integration & Migration

Unlock the power of external systems such as Google Maps, QuickBooks Online, and Zillow integrating Salesforce via our experts.



Ongoing Support

Keep your configuration relevant by establishing a consistent revision and release cadence with our expert release management team.

OUR CERTIFIED EXPERTS FOCUS ON CORE SALESFORCE CLOUDS

CLOUDS WE COVER

Experience Cloud

Enable your partners and customers to self-serve with Experience Clouds

Marketing Cloud

Target your ideal clients, market through multiple channels, and convert prospects to customers

Service Cloud

Reduce case resolution time, increase case deflection, and grow your knowledge base

Sales Cloud

Find customers, close deals faster, and grow accounts

Pardot

Expand your marketing footprint, reengage cold leads, drive value from your contacts database

CPQ

Optimize product catalogues, enforce pricing rules, generate branded invoices and quotes



Certified Expertise

OUR CONSULTANTS ARE 100% CERTIFIED

All of CloudROI's team members are certified through Salesforce HQ and have a minimum of 5 years of experience working with Salesforce.

Architecture



Development



Consultant



Administration



Marketing



WHERE ARE OUR EXPERTISE LIES

OTHER PLATFORMS WE IMPLEMENT



CLOUDROI WORKS WITH MANY LARGE INDUSTRY PLAYERS

OUR CLIENTS





How we get things done

DELIVERY METHODOLOGY

The following slides layout implementation journeys,
development methodology, and team structure.

DELIVERY METHODOLOGY

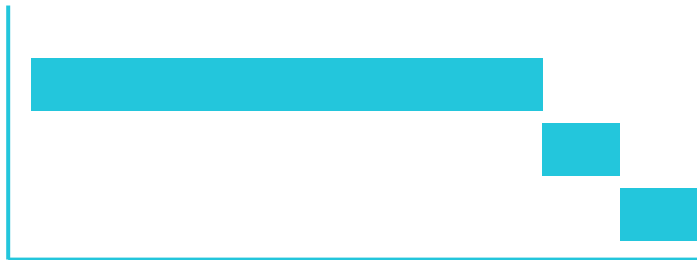
Project success begins with building a team of experts who understands your project objectives. You need to know there are clear, mutually understood project standards, as well as measurable information to demonstrate progress. You also need the flexibility to evolve requirements as they're better understood — and a team with the flexibility to adjust course. From project inception to final hand-off, the CloudROI Consulting Services Delivery Methodology addresses these needs.

We leverage an agile Delivery Methodology that enables customers and partners to successfully discover, implement, develop in-house knowledge, and gain real Return On Investment (ROI) with the rapid deployment of cloud applications. We'll keep you engaged in all aspects of project planning, building, and launch. Using defined, repeatable processes, we comprehensively cover all aspects of application development and platform adoption — keeping you apprised of progress and eliciting your feedback throughout the process.



IMPLEMENTATION STRATEGY

Implementations of any size can be a large undertaking for any company. Aligning the size, scope and timing for each phase of the implementation available resources is critical to project success. Below are several example implementation strategies and when to use them:



One-Phase

The implementation starts with one large phase in the beginning with short subsequent phases. The bulk of requirements are developed and deployed in the large phase. Minor functionality and enhancements are deployed in the subsequent phases.

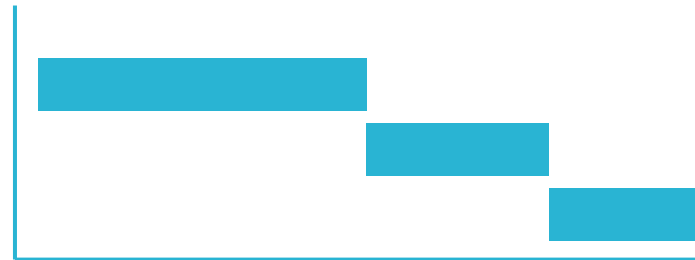
Use when:

The system is highly customized and integrated and therefore needs to be developed with a holistic view.

When time to deployment is more important than alignment to business processes and needs.

Common Industries:

Finance, Healthcare, Manufacturing



MVP

The implementation starts with the Most Valuable Product (MVP) phase followed by medium size phases to build out functionality on top of core features.

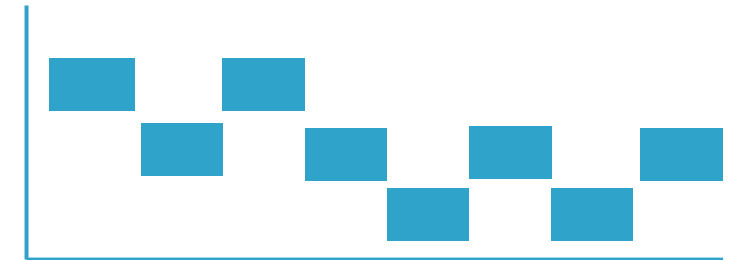
Use when:

Core functionality is well known, and additional features are not.

When retiring old CRMs and core functionality is required for business continuity.

Common Industries:

Construction, Public Sector, Legal



Iterative

The implementation is broken into short iterations throughout the entire project. With each completed iteration, other iterations are reevaluated and sorted accordingly.

Use when:

Requirements are shifting and not well defined.

Precise alignment to processes is required.

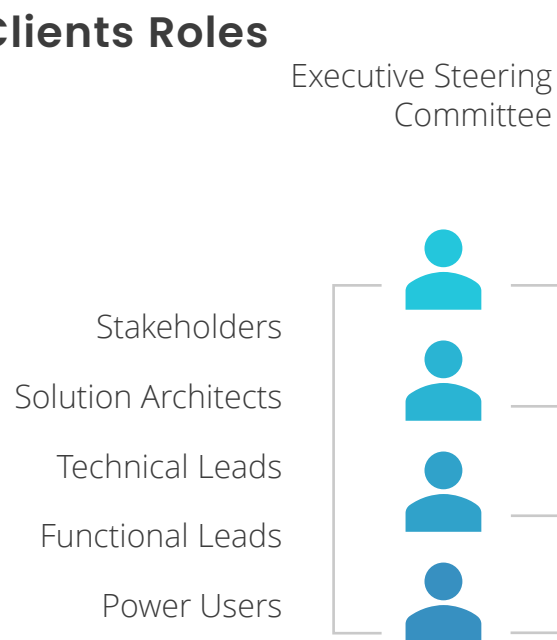
Common Industries:

Retail, Tech, Startups, Small Businesses, Non-profits

TEAM STRUCTURE

Building the right team is crucial to the success of a project. At CloudROI, our delivery methodology is driven from an agile model and so are our project team structures. To successfully plan out a project team, CloudROI incorporates both internal and client workers. This approach enables our clients and our internal team to perform demand planning and resource leveling across the entire project. The diagram below represents a common project structure:

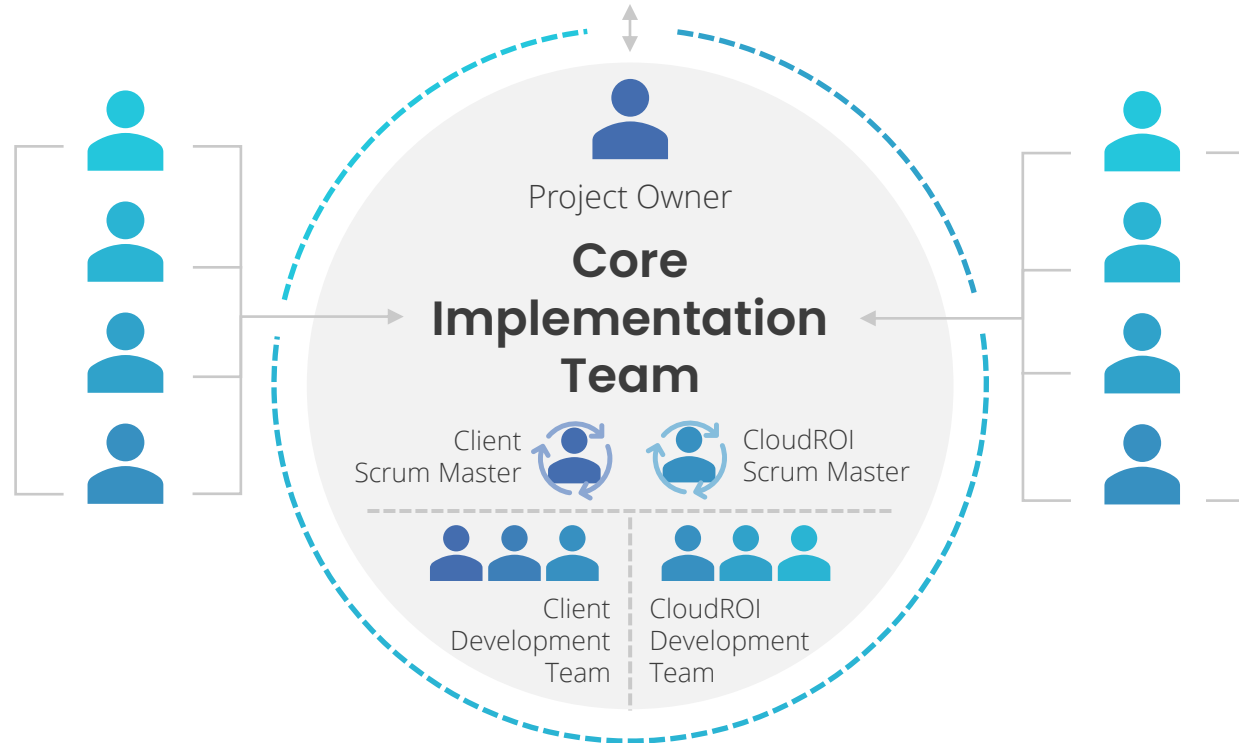
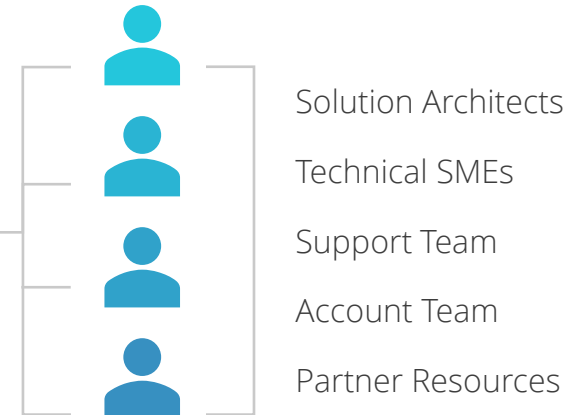
Clients Roles



Project Delivery Director

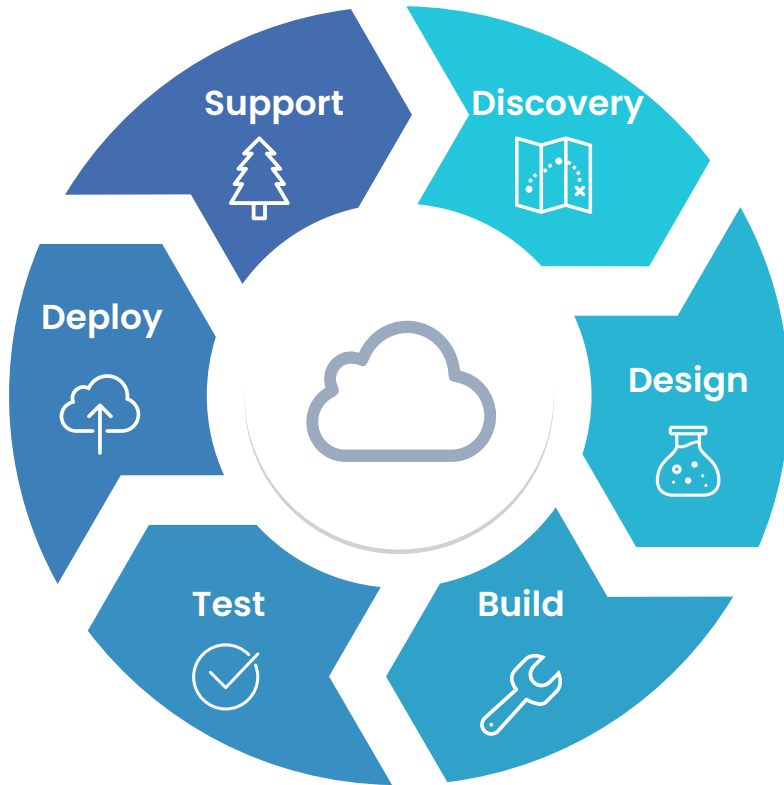


CloudROI Roles



STEPS TAKEN BY THE DEVELOPMENT TEAM TO BUILD YOUR DREAM CRM

SOFTWARE DEVELOPMENT STEPS



Step	Description	Output
Discovery	The discovery step starts with gathering functional requirements from key stakeholders and project team members. Once gathered, functional requirements are analyzed, organized and prioritized.	<ul style="list-style-type: none">• Kickoff meetings• Fit-gap analysis• Implementation plan• Functional requirements• Proposal document
Design	The design step creates technical requirements by aligning functional requirements to Salesforce features. Requirements are then added to the iteration plan.	<ul style="list-style-type: none">• Technical requirements• Feature design• Data migration plan• Iteration plan• Cutover plan
Build	In this step, functional and technical requirements are configured and developed in Salesforce.	<ul style="list-style-type: none">• Developed features• Configured settings• Smoke testing• UAT Execution Plan
Test	In this step, configured and develop requirements are tested by core implementation team members and power users.	<ul style="list-style-type: none">• Tested features ready for deployment• Feature revision list for the next iteration• UAT exit document
Deploy	Features are released into the Salesforce production environment.	<ul style="list-style-type: none">• Deployed features• Release notes• Support structure• Enhancement backlog
Support	Released features are supported after go-live ensuring a smooth transition to your workforce	<ul style="list-style-type: none">• Feature support cases resolved• Enhancement requests implemented• Roadmap planning

FLEXIBLE RESOURCING MODELS THAT MEET YOUR BUDGET

GEOGRAPHIC RESOURCING MODELS

Being an agile company, we strive to provide our customers with the flexibility of choosing the appropriate geographic resourcing model that best suits their needs. We offer the following geographic models:

ONSHORE

All project development, starting with envisioning through to the delivery and support stage, is executed by CloudROI remote workers.

OFFSHORE

All project development, starting with envisioning through to the delivery and support stage, is executed by CloudROI remote workers.

NEARSHORE


All project development, starting with envisioning through to the delivery and support stage, is executed by CloudROI remote workers.

BLENDDED ONSHORE/OFFSHORE

The onsite team located at the customer's premises directly interacts with the offshore development team.

ONGOING SUPPORT AT CLOUDROI


Ongoing Support is a flexible, scalable, and economic solution to maintain and realize your investment — without the need to hire additional full-time, dedicated employees. We'll build a team customized around the capabilities you need to succeed. See the list here for the key capabilities CloudROI can offer through ongoing support:




Strategic Planning
From executive goal setting meetings to business process reviews, building out a Salesforce Org is serious business. We'll help you from feature planning to long-term value realization.



Technical Support
We will take a continuous approach to keeping Salesforce operating to meet your business model and demands. We will troubleshoot, diagnose, and repair technical issues that arise through day-to-day operations.



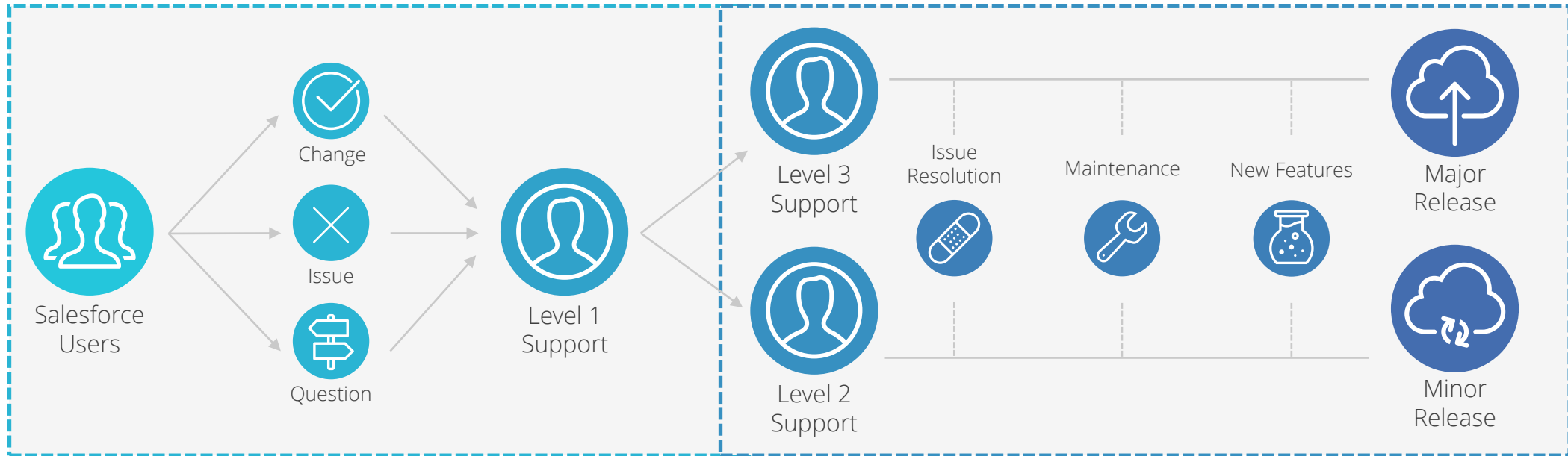
Ongoing Enhancements
As your business grows and evolves, your Salesforce org should too. We can manage your backlog, streamline business processes, and oversee continuous delivery so you can provide more transparency to leadership, investors and beyond.



System Experts and Industry Specialists
As great as they are, system administrators can't know every Salesforce product and cloud. Our team of experts can provide niche technical support to help your environment and support team thrive.

KEEP SALESFORCE ALIGNED TO YOUR BUSINESS NEEDS AFTER GO-LIVE

ONGOING SUPPORT MODEL



Level 1 Support

- Provide basic troubleshooting
- Log support request tickets
- Escalate tickets to appropriate team
- On board and off board users
- Record enhancements to the backlog

Level 2 Support

- Manage support ticket queues
- Provide advanced troubleshooting
- Fix configuration issues
- Monitor system performance and maintenance items
- Performance enhancement testing and release verification

Level 3 Support

- Manage development, evolution and enhancement backlog
- Provide architectural guidance
- Support system integrations
- Develop and deploy break-fix resolutions
- Enforce system release cadence



HOW TO GET STARTED

NEXT STEPS



Book a meeting

Review your CRM needs with one of our Salesforce specialists today: [Book Here](#)



Reach out with any questions

Still unsure of which route to go? Send an email to hello@cloudroi.com and we will answer any questions you have



Visit our website

Want to learn more? Visit us at cloudroi.com to learn more about our company and see our collection of case studies