



SALES CLOUD JUMPSTART

a Turnberry Salesforce solution

salesforce

TIME FRAME: 4-6 weeks

TEAM: Experienced Sales Cloud Consultant

designed to deliver the jumpstart **YOUR SALES TEAM NEEDS**

Everything you need to stand up your Sales Cloud instance in four to six weeks

- Optimize sales processes
- Increase quality of leads and opportunities
- Decrease sales efforts from lead to close
- Increase accuracy in forecasting
- Provide visibility into key sales metrics and KPIs
- Streamline existing business processes
- Boost sales team productivity by increasing deal flow and close rates

WHAT'S INCLUDED

1 Discovery + Exploration

- Lead discovery sessions to gather information around existing sales processes and structure
- Identify what information and data will be captured in Salesforce and how teams will interact with customer and prospective client data
- Understand key metrics and KPIs
- Summarize findings and learnings in a business requirements document

2 "The Jumpstart"

- Configure Sales Cloud to align with your desired sales process by using core components of Salesforce such as leads, opportunities, accounts, and contacts
- Configure web-to-lead functionality to ensure new leads are automatically assigned to the appropriate sales staff
- Configure simple flows, validation rules, and record types that align with your desired sales process
- Configure user accounts, security, and sharing capabilities
- Create relevant dashboards and reports that align with your sales goals and KPIs

3 Training

- Conduct training sessions for super users and trainers so they are prepared to conduct end user training
- Create and share training material related to the Sales Cloud jumpstart configuration

4 Readiness and Support

- Support user acceptance testing (UAT)
- Conduct and support the production go-live
- Support the sales team post go-live

WHY TURNBERRY?



Sales Cloud

The nation's leading companies partner with Turnberry for our holistic approach to Salesforce solutions, flexible engagement model, and top Salesforce talent of all levels. Turnberry's Salesforce capabilities combine all the perks you get from a large-scale system integrator, like national reach and breadth of expertise, with all the benefits of a boutique player, including flexible engagements and exceptional talent.

You can rely on our team's deep expertise in the manufacturing, legal, healthcare, and life sciences industries, and our proven track record helping clients realize the value of their Salesforce investments.

Already using Sales Cloud? Turnberry offers a variety of packages to reevaluate and optimize your existing Salesforce products. Reach out to info@turnberrysolutions.com to learn more.