

SALESFORCE FINANCIAL SERVICES CLOUD QUICKSTART PACKAGE



Empower Your Financial Services Business with Salesforce FSC: Gain Deep Client Insights, Automate Processes, and Enhance Client Relationships.



Boost in lead-to-deal conversion rates



Faster deal closure efficiency



Reduction in time spent on manual tasks



Increase client retention with personalization

What’s Included?

Kickoff & Business Process Review

Conduct a deep-dive discovery session to assess your current and desired business state.

Lead and Opportunity Management

Configure Lead conversion process to Account, Contact, and Opportunity with lead assignment.

Account and Contact Management

Set up 2 Account and Contact record types with custom fields to capture client-specific information.

Household Relationship Management

Enable and configure one Household Account model and establish relationship hierarchies.

Financial Data Management

Create custom objects and fields to track client portfolios, assets, and financial goals.

Workflow and Automation

Implement 5 workflow rules to automate key processes, email alerts, and approval processes.

Reports and Dashboards

Design ten reports to track and build 3 dashboards to visualize critical performance indicators.

Salesforce Training

Deliver up to 2 hands-on training to end-users, covering core modules and system functionality.

Post-Implementation Support

Offer post-go-live support for 1 week to address initial queries and ensure smooth adoption.

Salesforce is built to scale with your growing business:

Easily add users, automate new processes, and expand functionality as your organization grows.

Price: \$ 6,999 + taxes

Timeline: Approx. 4 Weeks

Users: Up to 10 Users

Profiles: 2 Custom Profiles

Optional Add-Ons

Enhance your package with optional add-ons to further optimize your Salesforce environment.

	Starting At
Additional Dashboards & Reports	\$1,000/-
Ongoing Monthly Admin Support	\$1,000/-
Custom API Integrations	\$1,000/-

Why Choose Upcrest Digital



Proven Track Record of Successful Implementations



Comprehensive Support from Initial Planning to Final Deal Closure



Tailored Solutions to Meet Your Unique Business Requirements



Commitment to Accelerating Business Growth and Client Success