

Salesforce CRM Quickstart & Optimization

Small and Mid-Sized Business Implementations



Welcome to the most popular and capable Customer Relationship Management (CRM) platform in the marketplace. You've made the right choice by selecting the Salesforce® CRM but now you may need to get things quickly configured to begin realizing the full power of what Salesforce.com® offers. And with the ever-changing needs of your business, constant refining and configuring of the CRM may be needed to align to your updated sales processes and procedures.

You need expert Salesforce® consultation, both to get started and afterwards, and initiated are often the most troublesome challenges to realizing an increase in business leads. CRM Evangelist is here to help by providing a QuickStart package to solve that problem.

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Who benefits from CRM Quickstart and continual optimization?

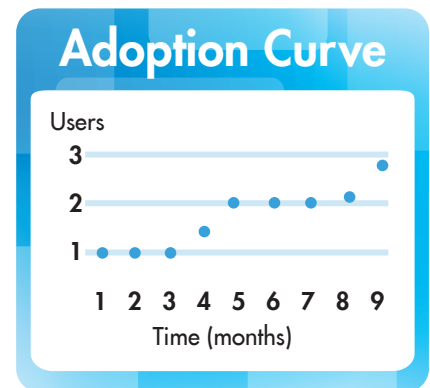
CRM Evangelist clients that found value in this methodology:

- Have 3 - 25 users of Salesforce® Sales Cloud™ or Service Cloud™
- Need to be up and running quickly — within three weeks
- Don't want to add new headcount to support Salesforce
- Recognize needs may change after initial rollout
- Are tired of manipulating data in spreadsheets to generate executive charts rather than using automated reporting
- Desire to take full advantage of all that salesforce.com® offers
- Want to have their CRM system align with their sales processes

How does the program work?

CRM Evangelist has developed a flexible two-step methodology for implementing Salesforce® CRM for rapid productivity of the basics while incorporating iterative improvements over time continuing best practices as well as responding to business changes. Don't settle for outdated expensive implementation methods. This approach delivers low-risk, consistent, incremental improvements attainable with salesforce.com's cloud-based CRM software.

CRM Evangelist has in-depth experience across hundreds of implementations, and will recommend best practices yet will customize the implementation for your specific needs. After one intense week, you will be up and running. Then the consultants at CRM Evangelist will spend time with you and your team regularly throughout the year to assess needed changes and with your authorization update your Salesforce® instance, accordingly. Together we will ensure that your Salesforce® CRM continues to meet the needs of your Sales Team as well as providing management accurate forecasting of revenue to the company.



Timeline to Benefits

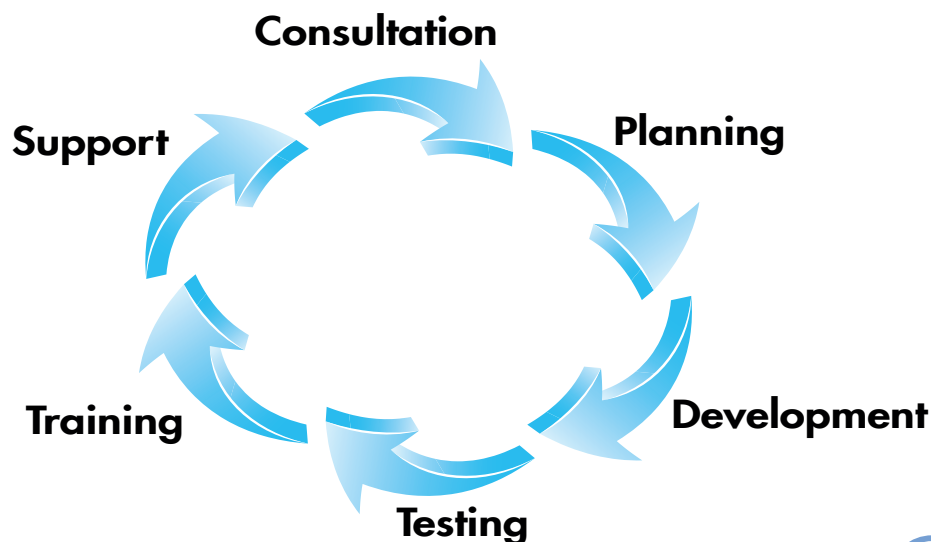
Deliverables occur as two key milestones including:

Milestone 1: **Initial high-energy** **deployment of** **basics in three weeks**

- ➡ Project kickoff meeting including a brief discovery workshop
- ➡ Application configuration, security, user provisioning
- ➡ Team training (onsite or online)

Milestone 2: **Small, consistent,** **and iterative** **improvements over** **12 months**

- ➡ Ongoing configuration updates to your Salesforce® CRM
- ➡ Custom reports and dashboard creation
- ➡ In depth data analysis
- ➡ User feedback solicitation
- ➡ Analysis of alignment with new and existing processes
- ➡ Custom analysis of the latest salesforce.com® upgrades, AppExchange applications, and which ones enable progress on your business roadmap
- ➡ “Tips and tricks” hands-on workshops addressing your teams questions



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