

Sales Cloud QuickStart

Accelerate Your Sales Process with AI-Powered CRM & Trusted Data

Datacolor.ai is a **Salesforce Select Partner** and **Informatica Platinum Partner** specializing in enterprise-grade Customer Data Management and AI-driven CRM implementations. We are pleased to present this letter outlining our **Sales Cloud QuickStart** offering — a structured engagement designed to activate Agentforce AI agents from day one, combining intelligent sales automation with Informatica-cleansed customer data. The result is faster pipeline velocity, higher forecast accuracy, and sales teams freed from manual data entry and repetitive tasks.

What's Included — Core Scope

Consultation & Discovery

- Requirements discovery workshops (up to 2)
- Sales process analysis and Salesforce object mapping
- Agentforce use-case identification for pipeline and forecasting
- Data quality baseline review with Informatica lens
- Success KPIs and go-live criteria definition

Salesforce Configuration

- Leads, Accounts, Contacts, Opportunities, Campaigns, Quotes, Assets, Products, Pricebooks
- Web-to-Lead, Email-to-Lead, Lead Assignment Rules
- User, Role, and Profile setup (up to 5 Profiles)
- Branded user interface and custom objects & fields
- Email sync (Outlook / Gmail), Email Templates
- Validation Rules, Approval Processes, Flows (up to 10)
- Reports (up to 15) & Dashboards (up to 5)

Agentforce Sales Agents

- Einstein Sales Agent — AI-driven opportunity scoring and next-step guidance
- Pipeline Intelligence Agent — real-time pipeline health monitoring and anomaly alerts
- Forecast Agent — AI-assisted forecast accuracy with variance explanations
- Agent grounding via Salesforce Data Cloud unified profiles

Informatica Data Quality

- Pre-migration data profiling for Lead, Account, Contact, Opportunity records
- Duplicate detection and master data consolidation
- Data quality score dashboard post-migration
- Salesforce Connector for Informatica IDMC SaaS — co-developed by Datacolor

Data Migration

- Basic: Leads, Accounts, Contacts — up to 50K records
- Standard+: Opportunities added — up to 200K records
- Premium: Full migration including Quotes, Assets — up to 500K records
- Client-cleansed data required prior to kickoff — no cleansing in scope

Resources & Enablement

- Senior BA / Project Manager
- Revenue Cloud Certified Solutions Architect
- Agentforce Implementation Specialist
- Training & Enablement sessions (2 hrs Basic / 6 hrs Standard+ / 10 hrs Premium)
- 4-week post-go-live hypercare support included

Engagement Tiers

Feature	BASIC — 2–3 Weeks	STANDARD+ — 4–6 Weeks	PREMIUM — 8–10 Weeks
Core Objects	Leads, Accounts, Contacts	All Basic + Opportunities, Quotes, Products, Pricebook	All Standard+ + Contracts, Assets, Sales Forecasting
Profiles / Record Types	Up to 2 Profiles	Up to 5 Profiles / 2 Record Types	Up to 5 Profiles / 2 Record Types
Custom Fields	Up to 10 per object	Up to 20 per object	Up to 20 per object
Flows / Validation Rules	—	Up to 5 Flows / 10 Validation Rules	Complex Flows & custom Lightning (up to 5)
Reports / Dashboards	10 Reports / 2 Dashboards	15 Reports / 5 Dashboards	15 Reports / 5 Dashboards
Campaigns	—	Up to 2	Up to 2
Agentforce Agents	—	Einstein Sales Agent	Pipeline Intelligence + Forecast Agents
Informatica Data Quality	—	—	✓ Data quality baseline
Data Cloud Grounding	—	—	✓ Included
Data Migration	Up to 50K records	Up to 200K records	Up to 500K records
User Training	2 hours	6 hours	10 hours
Hypercare Support	4 weeks post go-live	4 weeks post go-live	4 weeks post go-live
Timeline	2–3 Weeks	3–5 Weeks	8–10 Weeks
Price	\$7K – \$9K	\$12K – \$17K	\$20K – \$35K

Key Benefits

 **Rapid Deployment** — Get operational in weeks, not months — pre-built accelerators compress timelines by 40%.

 **Agentforce-Native** — Einstein Sales, Pipeline Intelligence, and Forecast Agents configured as part of implementation — not afterthoughts.

 **Trusted Data** — Informatica Platinum Partner expertise ensures your CRM is built on clean, governed, deduplicated data.

 **Proven Outcomes** — 60% data quality improvement and 3× faster time-to-value on real customer engagements.

 **Fixed Scope & Timeline** — Clear deliverables per tier with no surprise overruns. 4-week hypercare included.

 **Co-sell Ready** — Aligned with Salesforce AE priorities — positioned for joint pipeline and co-sell motions.

How It Works — Our Approach

01	02	03
Discovery & Assessment Requirements workshops, data quality baseline, Agentforce use-case alignment, and go-live KPI definition.	Architecture & Design Salesforce object model design, Informatica data pipeline architecture, and sandbox environment setup.	Configure & Build Full Salesforce configuration, Agentforce agent deployment, data migration execution, and dashboard build-out.
04	05	
Test & Validate Internal QA, client UAT sessions, agent demonstrations, and data quality verification.	Go-Live & Hypercare Production deployment, user training, and 4-week hypercare with email support and minor tweaks.	

Assumptions & Out of Scope

ASSUMPTIONS

- Client has cleansed source data prior to kickoff
- Refreshed Sandbox available at project start
- Requirements shared with Datacolor before kickoff
- Client SME available throughout engagement
- End-user training via Train the Trainer model
- Salesforce licenses purchased and provisioned

OUT OF SCOPE

- Custom Apex/LWC beyond specified limits
- Data cleansing and enrichment by Datacolor
- ERP or financial system integrations
- Third-party ISV integrations beyond email sync
- Marketing automation setup (separate engagement)
- Change management programs

We welcome the opportunity to discuss how the Sales Cloud QuickStart can be tailored to your organization's needs. Please do not hesitate to reach out to begin the conversation — we look forward to helping you accelerate your sales operations with the power of AI.

The Datacolor.ai Team

[Al Ramirez](#) | [214.641.2580](tel:214.641.2580) | sales@datacolor.ai | www.datacolor.ai