

Apprivo

Quick Start for Salesforce CRM

Quick Start

While every company's sales and marketing strategy is unique, every Salesforce CRM implementation shares common elements.

That's why Apprivo offers Quick Start, a fixed-price implementation package for companies with 50 users or less. Quick Start gets you up and running on Salesforce within 30 days, delivering highly optimized sales and marketing processes that encourage user adoption and enhance revenue generation.

Expertise

Apprivo works exclusively with companies using Salesforce solutions, providing consulting and custom development services.

Whether start-up or industry leader, customers want to know what's worked, and what hasn't, in other companies. They need the type of insight and advice that can only be acquired through real-world experience.

"Apprivo leverages our wealth of experience to deliver customer value with every interaction."

Apprivo leverages the best practices of our most successful implementations in Quick Start, allowing you to benefit from our real-world lessons learned.

Methodology

Quick Start for Salesforce CRM adheres to the following implementation methodology:

Phase 1: Business Process Review

Apprivo will conduct a business process review (BPR) session with your designated business stakeholders. Market dynamics and the intended strategic value of your Salesforce

CRM implementation are discussed and current and future business processes are reviewed. The outcome of this phase is a formal agreement of requirements and priorities.

Phase 2: Design

Apprivo will then document the BPR findings and recommend a set of best practices to meet your unique business requirements. The outcome of this phase is the solution design workbook, a design document that captures the page layouts, required fields, custom fields, pick-list values, and profiles required for your Salesforce CRM implementation.

Phase 3: Configuration

Using the approved solution design workbook, Apprivo will configure the implementation. During this phase, Apprivo will perform two to three review sessions to verify that the configuration approach is following the approved design. It is imperative that the appropriate business owners be available and involved in this phase so that their input is considered and incorporated (if requested) by the desired go live date. This phase culminates with the customer testing the application and giving Apprivo a written signoff acceptance of the configurations.

Phase 4: Testing & Customer Handoff

Apprivo will perform end-to-end tests from each user constituent perspective. Apprivo will also conduct one internal training session with your business users, and one technical handoff with your Salesforce administrator.

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Deliverables

Quick Start for Salesforce CRM includes the following::

Application Delivery

- Implementation of a closed-loop sales and marketing system from campaigns, to leads, to opportunities and forecasts.
- Implementation of one custom business process either developed from scratch or leveraged from the Salesforce AppExchange.
- Installation of best practices dashboards to measure sales and marketing processes.
- Installation of a best practice user adoption dashboard.
- Initial import of existing accounts and contacts using an import format specified by Apprivo.
- Migration of one customer-provided HTML-based lead-capture form to Salesforce Web-to-Lead.

Administrative Settings

- Creation of users and profiles and configuration of role hierarchy and sharing settings.
- Configuration of validation rules and workflow, including approval workflow of sales and marketing processes as required.
- Design and creation of page layouts.

Customer Handoff and Training

- One end user quick reference guide.
- One end user focused training session delivered online.
- One administrator focused knowledge transfer session.

Out of Scope

Quick Start for Salesforce CRM excludes the following:

- Data migration and de-duplication.
- Configuration of Salesforce Content.
- Language support other than English.
- Custom development including Apex and s-controls.

Cost and Timeline

Quick Start for Salesforce CRM is offered for a fixed price. Changes in scope for additional services are subject to additional fees and require approved change orders.

The implementation must be completed within 30 days of the project kick off meeting. Therefore, you must provide Apprivo with ready access to key business stakeholders and adhere to the agreed upon project timeline. Additionally, all Salesforce licenses must be purchased prior to kick off.