

Apprivo

Quick Start for Salesforce PRM

Quick Start

While every company's channel strategy is unique, every Salesforce PRM implementation shares common elements.

That's why Apprivo offers Quick Start, a fixed-price implementation package for companies with 100 partner users or less. Quick Start gets you up and running on Salesforce PRM within 30 days, delivering highly optimized channel processes that encourage partner adoption and enhance satisfaction.

Expertise

Apprivo helped salesforce.com go to market by collaborating on early partner relationship management applications. Today, Apprivo is proud to have implemented more Salesforce Partner Portals than any other consulting partner. Our deep domain expertise and product knowledge allow Apprivo to deliver immediate value to customers.

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Customers come to us because they can't afford to gamble on their channel. When Salesforce is rolled out to partners, the margin for error is slim. 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 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 PRM 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. Channel dynamics and the intended strategic value of your Salesforce PRM 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 Partner Networks 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.

Phase 4: Testing & Customer Handoff

Apprivo will perform end-to-end tests from both the partner and internal user perspectives. 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 PRM includes the following:

Application Delivery

- Creation of one fully branded portal in the style of your public website, or other specified site, and, if required, development of HTML code to integrate the portal login with your public or specified site.
- Implementation of up to two channel-specific processes; choose from Deal Registration, Lead Distribution, Market Development Funds, and Channel Plans.
- Installation of reports and dashboards to measure the chosen channel processes.
- Installation of a best practice partner adoption dashboard.

Administrative Settings

- Configuration of the partner portal settings and permissions to support your unique partner types (i.e. gold, silver, reseller, distributor, etc.).
- Creation of partner profiles and users.
- Configuration of workflow, including approval workflow, for the chosen channel processes.
- Design and creation of partner-specific layouts and assignments.

Customer Handoff and Training

- One internal user quick reference guide.
- One partner user quick reference guide.
- One internally focused training session delivered online.
- One administrator focused knowledge transfer session.

Out of Scope

Quick Start for Salesforce PRM excludes the following:

- Data migration and de-duplication.
- Language support other than English.
- Custom development including Apex and S-controls.

Cost and Timeline

Quick Start for Salesforce PRM 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.