

Apprivo

Quick Start for Salesforce Service and Support

Quick Start

While every company's service and support strategy is unique, every Salesforce implementation shares common elements.

That's why Apprivo offers Quick Start, a fixed-price implementation package for companies with 50 internal users and 1,000 customer portal users or less. Quick Start gets you up and running on Salesforce Service and Support within 30 days, delivering highly optimized service and processes that enhance agent productivity and improve user satisfaction.

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 implements processes and solutions that scale with your customer growth."

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 Service and Support 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 dy-

namics and the intended strategic value of your Salesforce Service and Support implementation are discussed and current and future business processes are reviewed. The outcome of this phase is a formal agreement on 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 Service and Support 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 Service and Support includes the following:

Application Delivery

- Implementation of a closed-loop customer service system, from case creation to resolution.
- 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 one custom business process either developed from scratch or leveraged from the Salesforce AppExchange.
- Installation of best practice dashboards to measure customer service metrics including case escalation and aging, and agent productivity.
- Installation of best practice dashboards to measure internal and customer portal adoption.
- Initial import of existing accounts and contacts using an import format specified by Apprivo.
- Migration of one customer-provided HTML-based case-capture form to Salesforce Web-to-Case.

Administrative Settings

- Creation of users and profiles and configuration of role hierarchy and sharing settings.
- Configuration of workflow including case routing, notification and escalation rules, as well as geography-based business hours.

- Design and creation of page layouts to meet the needs of internal and external user types.

Customer Handoff and Training

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

Out of Scope

Quick Start for Salesforce Service and Support excludes the following:

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

Cost and Timeline

Quick Start for Salesforce Service and Support 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.