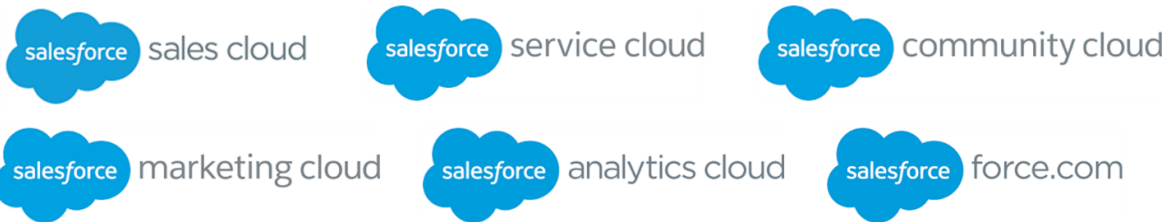




building what's next

BEST PRACTICE SALESFORCE IMPLEMENTATION

Successful Salesforce implementations require a great deal of planning, commitment and strong support from your company's leadership team. As a certified implementation partner of Salesforce, we're committed to enhancing your organization's Salesforce CRM effectiveness by offering a full array of implementation solutions including:



Salesforce's leading CRM and cloud-computing solutions have thousands of companies around the world effectively managing their customer relationships through multiple channels. At Configero, we go above and beyond to ensure that all aspects of your Salesforce implementation are effectively managed—every step of the process.

PROVEN IMPLEMENTATION METHODOLOGY

Configero's implementation methodology is designed to enable a successful deployment of Salesforce. A typical Configero implementation lifecycle includes the following phases:



- Phase 1 - **Launch**: Confirm scope, objectives, establish project approach and develop the project plan.
- Phase 2 - **Discover**: Identify solution (functional & technical), analyze and define the requirements.
- Phase 3 - **Design**: Conduct detailed design workshop, prepare design document and sign-off.
- Phase 4 - **Build**: Translate design specifications into a configured and customized Salesforce solution.
- Phase 5 - **Validate**: Execute test plan to validate the solution is constructed to meet the requirements.
- Phase 6 - **Deploy**: Transition solution to live production, Admin & End User training, post go-live Support.



By customizing the implementation solution to match your unique business needs, Configero enables your organization to benefit from enhanced effectiveness and help you realize Salesforce ROI.

SALESFORCE QUICK START IMPLEMENTATION

The Fastest, Easiest Way to CRM Success

The value of CRM technology to an organization depends largely on the initial implementation and how the tool is configured to meet the needs of the unique business. With Configero's QuickStart Implementation offering, companies can get up running on Salesforce rapidly and successfully, with a long-term, strategic vision on business impact and ongoing ROI.

QuickStart is ideal for companies just getting started on their CRM roadmap with less complex configurations and fewer users. Configero will configure and customize the platform uniquely to the goals and needs of the organization, load existing data and onboard users to manage the tool daily for maximum usability, reliability and adoption in up to 4 weeks.

Discover, Design, Build and Configure

We'll implement Salesforce specific to your business requirements and customize the application for ease of use, easy search capabilities and key data points:

Application Management:

- Configure object page layouts, page sections, and custom field
- Customize home page, custom views, and page layouts
- Set up Sales app, tabs, related list views, and mini-view hover details

Customer and Contact Management

- Configure account and contact process and custom fields
- Configure validation rules and field dependency

Pipeline and Activity Management

- Configure sales and activity processes, including stages
- Configure validation rules and field dependency

Security Settings

- Configure enterprise-wide roles and hierarchy
- Customize organization-wide sharing settings

Reports and Dashboard Management

- Configure sales pipeline and sales effectiveness reports and dashboards

Data Quality and Migration

The following activities are designed to load the initial data required for the most effective user adoption.

Import Account / Contacts

- Download Configero AppExchange Data Loader and setup mappings
- Load and perform a review of data after import

Validate, Test, Deploy and Train

Configero ensures implementation success by testing the Salesforce instance in a demo environment without disrupting existing methods, and provides deployment and user training to onboard CRM stakeholders:

- Conduct application unit testing and configuration workshops
- Conduct end-user training and system administrator training

Close and Roadmap

Configero thoughtfully executes the final step in closing out the project by auditing a check list of completed tasks and conducting a final meeting to ensure the application is deployed satisfactory.

- Conduct final team status meeting
- Provide recommendations for future phases and roadmap

QUICKSTART PRICING

Package Options*

SERVICE	PREMIER	STANDARD
Description	\$17,500	\$12,500
Business Process Review	✓	✓
Configure – Application	✓	✓
Configure – Accounts, Contacts	✓	✓
Configure – Opportunities, Activities	✓	✓
Configure – Security	✓	✓
Configure – Reports & Dashboards	✓	✓
Configuration Workshops	✓	✓
Training – End Users (up to 25 and 1 Session)	✓	✓
Training – Sys Admin (up to 4 hrs.)	✓	
Migrate Data (Accounts & Contacts)	✓	
Admin Support – Post Go-Live (up to 8 hrs.)	✓	
CRM Roadmap	✓	

**Custom pricing available following comprehensive Discovery Session*

A la Carte Offerings

SERVICE	DESCRIPTION	COST
Data Quality and Migration	Review, de-dupe, migrate account/contact data (up to 10,000 records)	\$3,200.00
Admin Support	Provide ad-hoc support for system administrator (up to 8 hours)	\$1,600.00
Adoption Strategy	Create adoption strategy and support (up to 8 hours over 4 meetings)	\$1,600.00
Admin Training	Conduct system administrator training (up to 4 hours)	\$800.00