

SALESFORCE QUICKSTART SERVICES

Start Fast. Start Right. Start Thrifty.

Definition of a QuickStart Package

QuickStarts are fixed-price engagements designed to help customers quickly get value from their **Salesforce Professional Edition** investment. As a registered **Salesforce** partner, **HigherEchelon** has deep experience in designing, customizing and implementing Salesforce solutions. Over a total span of 40 hours of work, **HigherEchelon** will:

- Meet with your team to understand your unique needs
- Recommend a data model design
- Build out a basic but functional Salesforce environment based on the above
- Establish basic reports and dashboards
- Perform data imports from specially-formatted spreadsheets
- Provide end-user training

At the conclusion of the QuickStart, many customers are confident they can continue customizing and implementing Salesforce on their own. If needed, **HigherEchelon** can provide follow-on services based on learnings in the engagement and continued feedback from the customer.

Details on What is Included

Prior to Requirements Gathering Session – 2 Hours

Conduct pre-calls with primary stakeholder(s) to define and prioritize the goals for the project. Gain an understanding of how your organization markets and sells to your customers, and how that translates into the use of a CRM system. Collect information on what is in use today and what, if any, data can be harvested for re-use in Salesforce.

Requirements Gathering Session – 4 Hours

Using a structured process, our team will fully document the systems and data sources currently in use today. Core capabilities of Salesforce, such as **Accounts, Opportunities, Contacts, Cases** and **Leads** will be discussed in the context of which elements apply to your organization. Whiteboarding and other techniques will be used to collaboratively design a working data model that is well understood by all parties. Also in scope for this session is an investigation into the kinds of reports and dashboards your organization requires.

Environment Build-Out –16 Hours

We will define and implement a base set of customizations to the system including but not necessarily limited to:

- Initial User setup
- Minor customizations to the core data model
- Basic Page Layout instantiation and customization
- Workflow processes
- Reports and dashboards
- Lightning for Outlook/Gmail

In this block of time we will also perform basic data imports from CSV-formatted spreadsheets.

End User Training – 8 Hours

We will customize our existing training materials to align to your environments and deliver remote training to both your end-user community as well as to your administrator(s). In-person delivery of training is possible depending on location. Your staff will leave excited about the new tools and capabilities they possess to run a modern, efficient organization.

SALESFORCE QUICKSTART SERVICES

Start Fast. Start Right. Start Thrifty.

Out of Scope for QuickStart

While any engagement can be customized and expanded, the following aspects of deploying Salesforce are generally out of scope for the fixed price offering:

- Installation of AppExchange packages
- Integration with other systems including payment-processing integration
- Data export/extraction or cleansing of data
- Portals
- Quotes, Products and Forecasting

Benefits to the Customer

The anticipated benefits to the QuickStart customer are:

- Getting started on the right foot and avoiding common pitfalls/missteps
- Skilling up quickly on the elements of Salesforce that matter most to your needs
- Getting your end users excited and productive on the new system fast
- Establishing a relationship with a set of experts you can engage deeper with at any time

The Costs

#	Description	Total Price
0001	QuickStart Workshop Spanning 30 hours of Work	\$5,000.00
0002	Startup Support for 1st Month (Optional)	\$2,000.00

Payment Terms: 50% billed at contract signing, with balance to be invoiced upon completion, Net 30.

Please note, the prices listed above are for customers owning **Salesforce Professional Edition**. **Salesforce Enterprise Edition** is a more complex QuickStart effort and will have an uplift in fees from the cost structure above. Contact us for details.

HigherEchelon, Inc. (HE) is a Human and Organizational Performance consulting firm with offerings in software development, process improvement and human capital services to both public and private sector clients. We focus on the intersection of people, process and technology to help organizations overcome their challenges and reach full potential by optimizing their efficiency and effectiveness.