

## SALESFORCE QUICKSTART SERVICES

Start Fast. Engage with Pros. Realize your Investment.



HigherEchelon consistently receives 5-star reviews in [Salesforce AppExchange](#)

## HOW MUCH TIME & MONEY COULD YOU SAVE WITH SALESFORCE AUTOMATION?



"Previously our organization was fragmented utilizing different solutions for each of our Residential Academies. ...Normally the process would take several days and sometimes weeks to gather all relevant information from a student and then process that file via our internal processes. [HigherEchelon] provided us with amazing service. They were there every step of the way and guided us through the process of planning, developing, implementing, testing and maintenance for our new cloudbased database built by them. They were quick and with our new system, **we are saving 100s of work hours a month.**"

- Staff Sergeant Cotton, Discovery Challenge Academy

"We brought HigherEchelon onboard to help us thoughtfully and quickly implement new capabilities across our Salesforce instance. Their expertise, especially in the private equity space, was extremely valuable... they were extremely responsive to our needs and requests, including being onsite to help troubleshoot development or our production roll-out to the business. HigherEchelon consistently worked to our schedule and scope and delivered a product **on time and within budget.**"

- Brian Cohn – Federal Capital Partners, Director of Information Technology



### What is a QuickStart?

**QuickStarts** are fixed-price engagements designed to help customers quickly get value from their **Salesforce Professional Edition** investment. As a Silver-Certified **Salesforce** partner, **HigherEchelon** has deep experience in designing, customizing and implementing Salesforce solutions. Over a total span of 6 weeks 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
- ✓ 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.

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### How does the 4-Step QuickStart Process work?



#### ➤ 01: ASSESS

##### **Prior to Requirements Gathering Session – 2 Hours**

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

#### ➤ 02: PLAN

##### **Kick-Off/Requirements Gathering Session – 4 Hours**

Using a structured process, our team will fully document the systems and data sources currently in use. 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. We will use whiteboarding and other techniques to collaboratively design a working data model that is well understood by everyone. We will also investigate which kinds of reports and dashboards your organization requires. A list of required materials for the kick-off will be provided to the customer and is required one (1) week before the kick-off.

#### ➤ 03: LAUNCH

##### **Environment Build-Out – 6 Weeks, 3 Sprints**

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
- ✓ Up to three (3) Reports and one (1) dashboard
- ✓ Install of Lightning for Outlook/Gmail and/or Salesforce Mobile App on up to five (5) devices for Office 365 or Gmail users only

In this block of time we will build data import templates from CSV or XLS formatted spreadsheets provided by the customer and show the customer how to import the populated templates into Salesforce. The QuickStart package base price covers up to 3000 imported records.

#### ➤ 04: TRAIN

##### **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.

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### What are the benefits of QuickStarts?

- ✓ Working with a shop that follows Agile methodology to ensure tight alignment of solution to customer needs
- ✓ 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 up-to-speed on the new system fast
- ✓ Establishing a trusted relationship with expert partners you can engage deeper with at any time

### What is the investment?

CLIN	Description	Total Price
0001	QuickStart Project Spanning 6 Weeks – 3 sprints	\$18,000.00
0002	Startup Support for 1st Month (Optional)	\$2,000.00

**Services Retainer:** HigherEchelon includes the terms of a Services Retainer in all of our contracts. Most customers are delighted with our work and choose to extend support beyond the first month covered in the QuickStart. The Services Retainer makes that a seamless option.

**Payment Terms:** 50% billed at contract signing, with balance to be invoiced upon completion or after 8 weeks if customer-induced delays are incurred, 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.

### What add-ons are available?

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

- ✓ Installation of AppExchange packages
- ✓ Configuration of Email integration for non-Office 365 or Gmail users, or for non-commercial variants of those SaaS solutions
- ✓ Integration with other systems including payment-processing integration
- ✓ Data export/extraction or cleansing of data
- ✓ Portals (e.g. Community Sites)
- ✓ Quotes, Products and Forecasting

