appex Consulting

Your growth, powered by Salesforce

Company Presentation

Who Are We

Appex is an agile consulting business based in Greece but operating globally and it offers its expertise on the Salesforce technology primarily to SMBs[1].

We enable our clients to grow by adopting Salesforce,
the leading cloud-based customer relationship management (CRM) platform designed to help organizations manage various aspects of their business, mainly focused on Sales, Customer Service, Marketing, Analytics & IT.

[1]: SMBs: Small & Medium Businesses

Our Vision

We aspire to become **Europe's No.1 Salesforce Consultancy for SMBs.**

In order to succeed, we always follow our 3 Main Pillars:

Focused Dedication to SMBs

Our key differentiator is that we do not mainly serve big enterprises, but smaller companies. We adapt to their unique needs and budgets and we show them how Salesforce can fit all company sizes.

Salesforce Expertise

We possess in-depth knowledge of the technology and its unique features. By maintaining and growing a certified partnership with Salesforce, we ensure we are always up-to-date and capable to solve any problem for our clientele.

Agility

Our team of young talent is global, fully remote and proud of it! This structure allows us service our clients fast and build or adapt to feedback even faster.

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Customer Relationship Management (CRM)
Manage customer relationships & improve internal collaboration

Automation
Native & custom flows to free up employee time and streamline operations

Scalability
Salesforce is 100% cloud-based, a perfect fit for growing businesses

Data-Driven Decision-Making
Robust analytics, reports & dashboards powered by AI

Integrations
Connect with 3rd party systems (ERP, marketing automation, e-commerce etc.) to centralize all data of your business

TBC

The world's #1 CRM platform & market share leader[1]

[1]: International Data Corporation (IDC) ranked Salesforce #1 for the 9th consecutive year

Our Services

We provide 4 different services to cover all the needs of your business using Salesforce

Implementation
We build the Salesforce platform for you

We adapt the platform to your exact needs, customize any element you need and integrate it to other third-party systems you may use (e.g. ERP, marketing tools etc.)

Managed Services
We handle all your Salesforce back-end activities

If you already use Salesforce, we provide all the required maintenance & support services to minimize your effort (administration, automation building or general support)

Consulting
We advise you on Salesforce

We train you on Salesforce, help you pick the optimal license mix or form adoption strategies

Org Optimization
We fix performance & system issues

If you notice problems in your existing Salesforce instance, we perform system health checks and help you optimize it

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'Kickstart'

Implementation Bundles

Quick, simple and budget-friendly project offerings to help you adopt Salesforce for your Sales and Service departments

1. Sales Kickstart

A quick and budget-friendly way to have Salesforce **Sales Cloud**[1] set and ready for your business

Standard Objects Set Up
Set up the initial objects that Sales Cloud uses to manage your sales lifecycle (Leads, Accounts, Contacts, Opportunities, Activities)

Your Sales Lifecycle in Salesforce
Duplicate your sales process in the system, build 1 Quote format to send to clients & create Product entries (1 Pricebook)

Connect to 1 Webform
Bring new leads directly from your website to Salesforce by building a Web-to-Lead form code to insert to your website

Email Integration
If you have a Gmail email account, we connect it to the CRM to automate logging of emails & contacts

Duplicate Rules
We set internal rules in the system to prevent the creation of a double entry of Leads, Contacts or Accounts

Historical Data Migration
We import the data of your current clientele in the CRM for the Account, Contact and Opportunity Object

Reports & Dashboards
We build 5 Reports & 1 Dashboard using the standard reporting features of Sales Cloud

Training
We provide 4 hours of training to business users, 4 hours to the Admin & useful training resources

[1]:You can find more information about Sales Cloud here

1. Sales Kickstart

A quick and budget-friendly way to have Salesforce **Sales Cloud**[1] set and ready for your business

Pre-Requisites

- Sales Cloud (Professional or Enterprise) user licenses already activated
- Data to be migrated already clean & organized

Assumptions

- No custom build is included
- No 3rd party system integrations (ERP, Billing)
- No other Salesforce Clouds are included (Service, Marketing)

Financials

- **Price under 5,000 EUR (excl. VAT)**
- 50% initial deposit on agreement
- 50% payment on Go-Live

Timeline

- Up to 2 weeks for the project to start after agreement
- Project timeline of 10 workdays

[1]:You can find more information about Sales Cloud here

2. Customer Service Kickstart

A quick and budget-friendly way to have Salesforce **Service Cloud**[1] set and ready for your business

Standard Objects Set Up
Set up the initial objects that Service Cloud uses to manage your service lifecycle (Cases, Accounts, Contacts, Activities)

Connect to 1 Webform
Bring new cases directly from your support website to Salesforce by building a Web-to-Case form code to insert to your website

Duplicate Rules
We set internal rules in the system to prevent the creation of a double entry of Leads, Cases, Contacts or Accounts

Reports & Dashboards
We build 5 Reports & 1 Dashboard using the standard reporting features of Sales & Service Cloud

Your Sales & Service Lifecycles in Salesforce
Imitate your service process in the system & create relevant Product entries
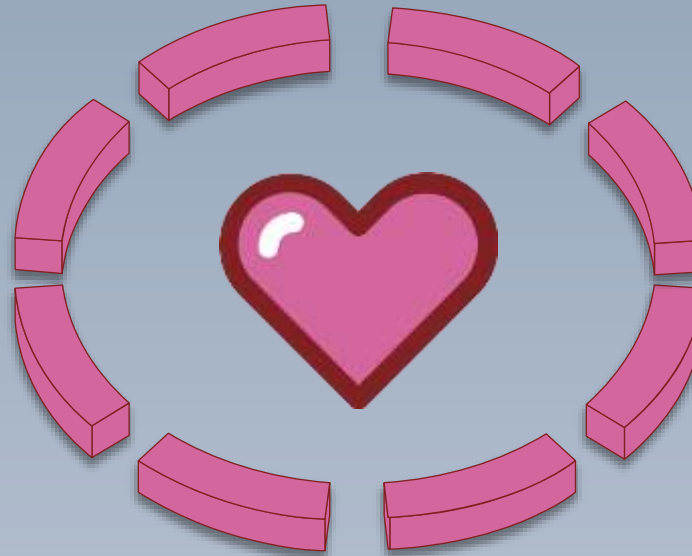
Email Integration
If you have a Gmail email account, we connect it to the CRM to automate logging of emails and create cases from emails

Historical Data Migration
We import the data of your current clientele in the CRM for the Account & Contact Objects

Training
We provide 4 hours of training to business users, 4 hours to the Admin & useful training resources

[1]:You can find more information about Service Cloud here

2. Customer Service Kickstart

A quick and budget-friendly way to have Salesforce **Service Cloud**[1] set and ready for your business

Pre-Requisites

- Service Cloud (Professional or Enterprise) user licenses already activated
- Data to be migrated already clean & organized

Assumptions

- No custom build is included
- No 3rd party system integrations (ERP, Billing)
- No other Salesforce Clouds are included (Sales, Marketing)

Financials

- **Price under 5,000 EUR (excl. VAT)**
- 50% initial deposit on agreement
- 50% payment on Go-Live

Timeline

- Up to 2 weeks for the project to start after agreement
- Project timeline of 10 workdays

3. Sales & Service Kickstart

A quick and budget-friendly way to have both Salesforce **Sales Cloud** & **Service Cloud**[1] set and ready for your business

Standard Objects Set Up
Set up the initial objects that Sales & Service Cloud use to manage your sales & service lifecycles (Lead, Cases, Accounts, Opportunities)

Connect to 2 Webforms
Bring new leads & cases directly from your website to Salesforce by building a Web-to-Lead & Web-to-Case form codes to insert to your website

Duplicate Rules
We set internal rules in the system to prevent the creation of a double entry of Cases, Contacts or Accounts

Reports & Dashboards
We build 5 Reports & 1 Dashboard using the standard reporting features of Service Cloud

Your Service Lifecycle in Salesforce
Imitate your processes in the system & create relevant Product entries, build 1 Quote format, Product entries & 1 Pricebook
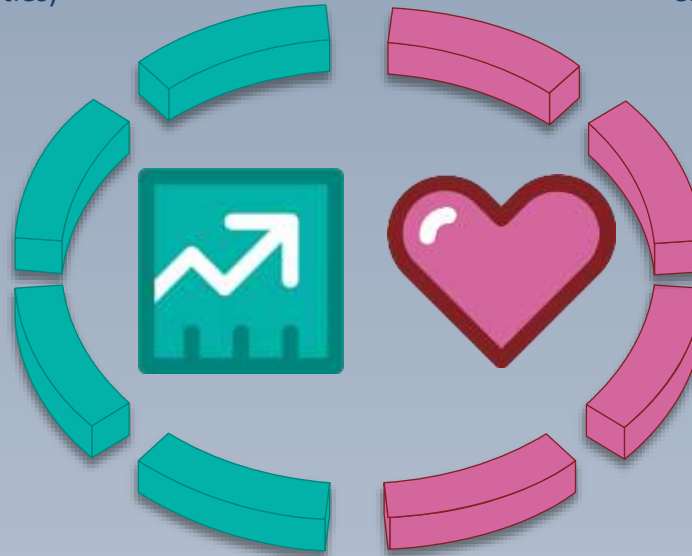
Email Integration
If you have a Gmail email account, we connect it to the CRM to automate logging of emails and create leads & cases from emails

Historical Data Migration
We import the data of your current clientele in the CRM for the Account & Contact Objects

Training
We provide 4 hours of training to business users, 4 hours to the Admin & useful training resources

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[1]:You can find more information about Sales Cloud here & Service Cloud here

3. Sales & Service Kickstart

A quick and budget-friendly way to have both Salesforce **Sales Cloud** & **Service Cloud**[1] set and ready for your business

Pre-Requisites

- Sales & Service Cloud (Professional or Enterprise) user licenses already activated
- Data to be migrated already clean & organized

Assumptions

- No custom build is included
- No 3rd party system integrations (ERP, Billing)
- No other Salesforce Clouds are included (Sales, Marketing)

Timeline

- Up to 2 weeks for the project to start after agreement
- Project timeline of 12 workdays

Financials

- **Price under 6,000 EUR (excl. VAT)**
- 50% initial deposit on agreement
- 50% payment on Go-Live

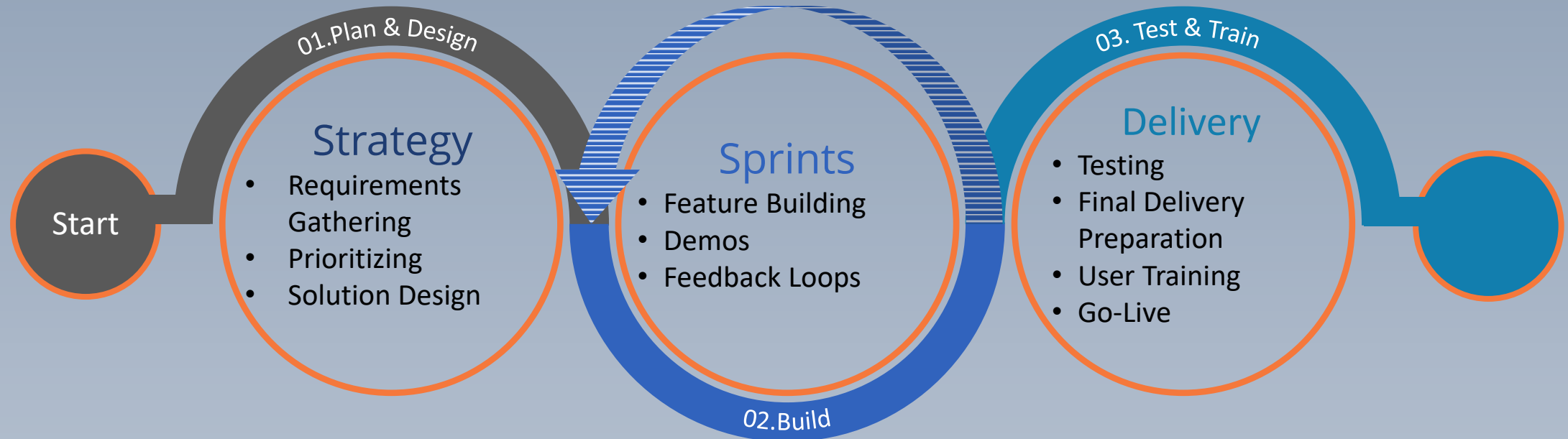[1]:You can find more information about Sales Cloud here & Service Cloud here

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Thank You!

Any Questions?

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