'Kickstart'
Implementation Bundles

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

![appex Consulting logo]

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 1 day before 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
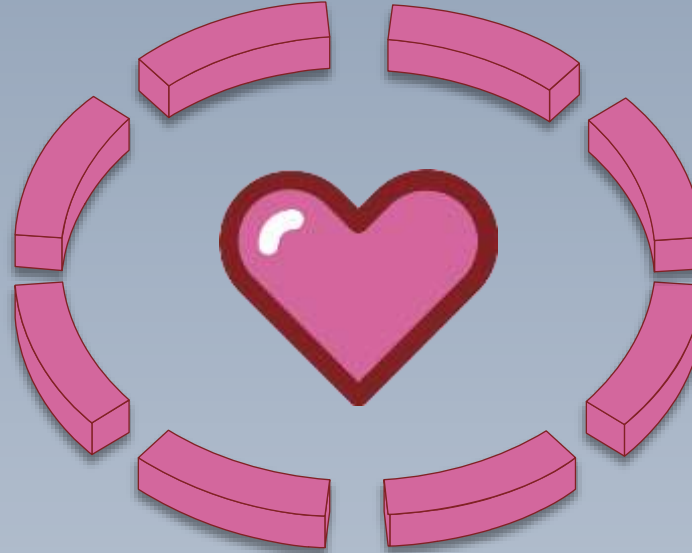
Email Integration
If you have a Gmail email account, we connect it to the CRM to automate logging of emails and create cases from emails

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 1 day before 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 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

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

Your Service Lifecycle in Salesforce
Imitate your processes in the system & create relevant Product entries, build 1 Quote format, Product entries & 1 Pricebook
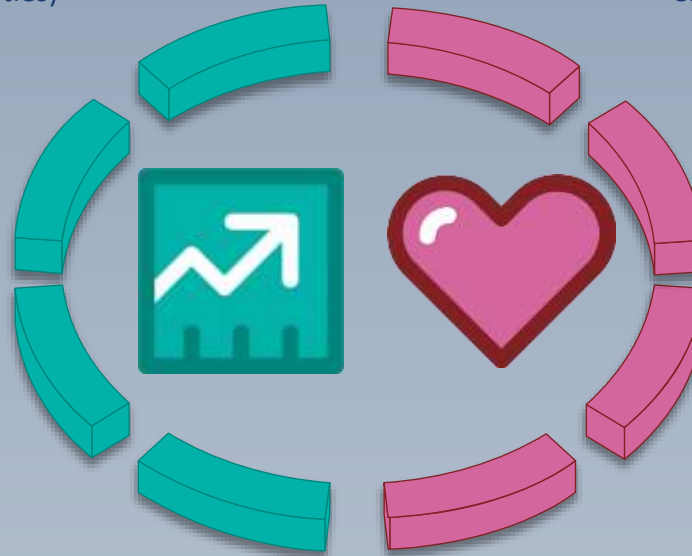
Connect to 2 Webforms
Bring new leads & cases directly from your website to Salesforce by building a Web-to-Lead & Web-to-Case form codes to insert to your website

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

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

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

Reports & Dashboards
We build 5 Reports & 1 Dashboard using the standard reporting features of Service 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 & 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 (Marketing)

Financials

- **Price under 6,000 EUR (excl. VAT)**
- 50% initial deposit on agreement
- 50% payment 1 day before Go-Live

Timeline

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

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

4. Marketing Kickstart

A quick and budget-friendly way to have Salesforce **B2B Marketing Cloud**[1]
set and ready for your business

Install Account Engagement Connector
Configure the initial settings for the Marketing module to work properly with the Sales (or Service) module and the rest of the Salesforce CRM

Configure Website Tracking & URL
Ensure the marketing platform works optimally and that all the protocols function as expected

1 Form
Bring new leads directly from to Salesforce by dynamic forms that you can reuse in your campaigns

1 Landing Page
Create 1 landing page that you could reuse and have an initial template for your campaigns

Standard Objects Set Up
Set up the initial objects to manage your B2B marketing lifecycle (Lead, Campaigns, Accounts)

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

1 Engagement Studio Journey
We build 1 journey that would match your ideal campaign and ensure steps are automated to bring quality leads

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

4. Marketing Kickstart

A quick and budget-friendly way to have Salesforce **B2B Marketing Cloud**[1]
set and ready for your business

Pre-Requisites

- Marketing Cloud – Account Engagement (Growth or Plus) user license already activated
- Data to be migrated already clean & organized

Assumptions

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

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 1 day before Go-Live

The Appex Project Methodology
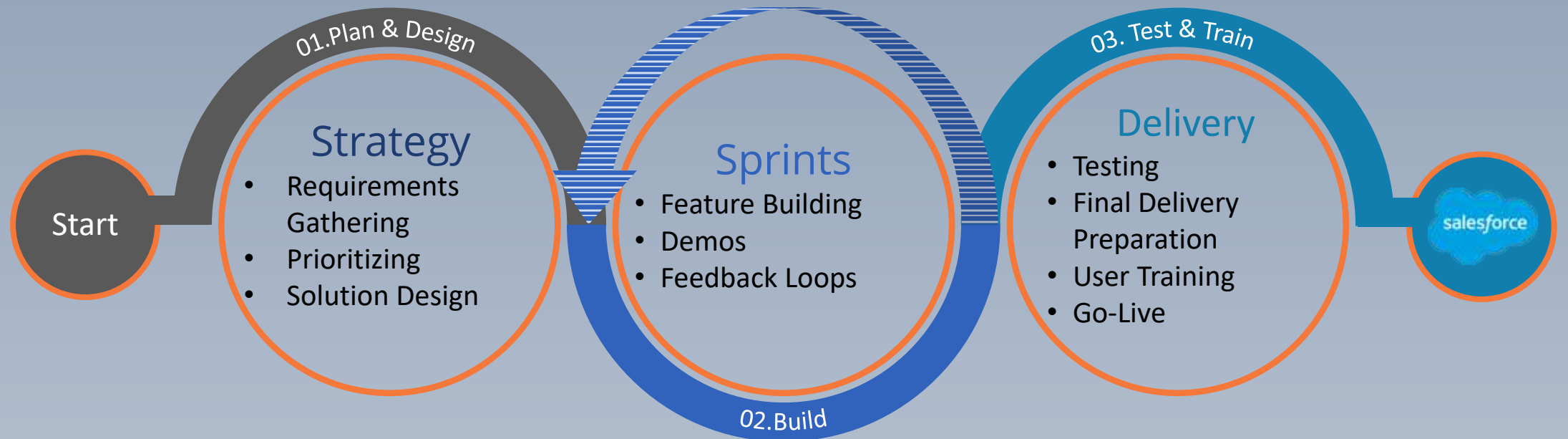
We follow a flexible approach on each project to ensure quick delivery and optimal results

01.Plan & Design

Start

Strategy
- Requirements Gathering
- Prioritizing
- Solution Design

Sprints
- Feature Building
- Demos
- Feedback Loops

02.Build

03. Test & Train

Delivery
- Testing
- Final Delivery Preparation
- User Training
- Go-Live

salesforce

Potential Pathways After Go-Live:

| Project Warrantee | Follow-Up Phase(s) | Ongoing Support |

Thank You!

Any Questions?

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