

Salesforce Consulting Package

Session 1: Introduction to basic terminology and data model.

Discovery of big picture needs for tracking sales process and prospect engagement. Introduction to website integration techniques. Discovery of potential data import needs, and website integration needs.

Questions:

- Who are your clients and prospective clients?
- How do you engage with prospects?
- What does your sales process look like?
- What information are you currently collecting from your website (or other sources)?
- What information do you want to collect about prospects?
- Where does your data live currently? Is it exportable?

After session 1, you will provide us with all exportable data that should be imported into Salesforce (if the data currently lives elsewhere). We will set up custom fields and mapping, based on your current website or website prototype, as well as information you provide during discovery. We will also set up example reports and an example dashboard, for use during session 2.

Session 2: Review of data model and new custom set-up.

Introduction to analytics: reports and dashboards. Continued discovery of needs, specifically regarding analytics.

Questions:

- What kinds of information do you need to analyze?
- What information would you like available to you at a glance?

After session 2, we will build reports and dashboards based on needs confirmed in previous sessions.

Session 3: Review of analytics set-up, continued discovery of your needs.

Introduction to the AppExchange, and discovery of third party integration needs.

After session 3, we may help with implementing third-party apps that you have approved for use. We will also continue setting up reports and tweaking the dashboard, based on the review of those new components.

After session 3, your Salesforce implementation should be ready for daily use. You should commit to using Salesforce daily for at least two weeks prior to the next session.

Sessions 4 and 5: The last two sessions will be follow-up sessions to the initial engagement. These can be scheduled at your convenience, based on new needs or questions that arise during the use of your new custom Salesforce set-up.