See value from Salesforce faster than ever with
Sales Cloud Jump Start

Get up and running on Salesforce in two weeks or less!
You’ve made a great decision to use Salesforce to connect with customers in a whole new way. And, like most people who are starting out with Salesforce, you probably want to get started and get your team on board as fast as possible.

That’s where Jump Start can help! With this quick and easy implementation service, you’ll receive a tailored setup, expert guidance, and even shadowing sessions from a top-level expert who knows Salesforce better than anyone. Your Jump Start implementation is designed to get you up and running on Sales Cloud in under 2 weeks - setting you up for success with Salesforce both now and for the long run.

How Jump Start Works
Only About 6 Hours of Your Team’s Time from Start to Finish

The Details
Price
USD $5K

People
- **Salesforce**: Salesforce Certified Resource
- **Customer**: Key Stakeholders/Decision Makers, Salesforce admin (the main person who will manage and maintain your Salesforce environment)

Prerequisites
- Customer to provide courtesy/temporary Login access
- Customer will provide business overview and configuration requirement overview
- Customer will allocate 6 hours of meeting time with Salesforce resources within predefined duration

The Deliverables
**In Scope**
- Configured Sales Cloud environment
- Setup 1 Profile & Users set up
- Configure Lead-To-Opportunity Business Process (Lead management, Account & Contact management, Opportunity Management)
- Custom Fields
- Up to 2 Custom Objects
- Enable Lightning Features such as Home Page, Workspace, Path, Guidance for Success, Kanban
- Create 5 Reports & 1 Dashboards
- Standard Duplicate & Matching Rules
- 3 - 45 minute Shadowing sessions (up to 2 hours)
- Advise on standard out the of box products, pricebooks, & quoting

**Out of Scope**
- Process Automation - Approvals, Workflows, etc.
- Integrations
- Advanced Features such as Products, Pricebooks, Quotes configurations, Flows, Process Builder etc
- Custom Code (e.g.: Apex Triggers, Apex Code, Custom Components)
See value from Salesforce faster than ever with
Service Cloud Jump Start

Get up and running on Salesforce Service Cloud in three weeks or less!

Congratulations on choosing Service Cloud to build customer loyalty and provide a better agent experience. As you prepare for launch, you probably want to hit the ground running with a quick implementation that sets up your service team for long-term success.

That’s where Jump Start can help! You’ll receive a tailored setup, expert guidance, and even shadowing sessions from a top-level expert who knows Salesforce and Service Cloud better than anyone. Your Jump Start implementation is designed to get you up and running on Service Cloud in under 3 weeks- setting you up for success with Salesforce both now and for the long run.

How Service Cloud Jump Start Works

The Details

Price
USD $5K

People
- **Salesforce:** Service Cloud Certified Resource
- **Customer:** Key Stakeholders/Decision Makers, Salesforce admin (the main person who will manage and maintain your Salesforce environment & Call Center)

Prerequisites
- Courtesy/temporary login access
- Install Email-to-Case Agent
- Business overview and configuration requirements
- Around 10 hours of meeting time for Salesforce resources with your key business stakeholders

The Deliverables

In Scope
- Set up one 1 custom profile and users
- 3 Personas (Ex: Agent, Manager, Specialist)
- Up to 3 Case Record Types
- Configure and customize Accounts, Contacts, and Cases
- Set Up Service Console
- 3 Case Queues and Case Routing/Assignment Rules
- 3 Case Escalation and Auto Response Rules
- 3 Email Templates
- Set up Web-to-Case and Email-to-Case (Configuration only)
- 3 MACROs - Examples: Set Subject and Status, Add Case Comment, Set & Send Email
- Quick Texts - First Customer Response, Agent Comment and Status update, Customer issue resolved and case closure
- Advisory/Guidance for Data Migration
- 2 Reports & 1 Dashboard
- Shadowing Sessions (Up to 3)

Out of Scope
- Integrations
- Entitlements
- Custom Code (e.g. Apex Triggers or Code, Custom Components)
- Full Data Migration
- Knowledge and Omni-Channel Configuration
- CTI
- Training
- Chat & SMS Channel
See value from Salesforce faster than ever with
Pardot Jump Start

Jump start your Salesforce Pardot implementation

Get up and running on Salesforce Pardot in three weeks or less!

You’ve made a great decision to use Pardot to connect with customers in a whole new way. And, like most people who are starting out Pardot, you probably want to get started and get your team on board as fast as possible.

That’s where Jump Start can help! With this quick and easy implementation service, you’ll receive a tailored setup, expert guidance, and even shadowing sessions from a top-level expert who knows Salesforce and Pardot better than anyone. Your Jump Start implementation is designed to get you up and running on Pardot in **under 3 weeks** - setting you up for success with Salesforce both now and for the long run.

**How Jump Start Works**

Only About 10 Hours of Your Team’s Time from Start to Finish

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<th>Lists &amp; Organization</th>
<th>Email Campaigns</th>
<th>Forms &amp; Landing Pages</th>
<th>Automation Tools &amp; Engagement Studio</th>
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<td>Meeting 1: 60 Mins</td>
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<td>Meeting 7: 90 Mins</td>
<td>Meeting 8: 60 Mins</td>
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</tbody>
</table>

**The Details**

**Price**

USD $5K

**People**

- **Salesforce**: Pardot Certified Resource
- **Customer**: Key Stakeholders/Decision Makers, Salesforce admin (the main person who will manage and maintain your Salesforce environment)

**Prerequisites**

- Customer to provide courtesy/temporary login access
- Customer will provide business overview and configuration requirement overview
- Customer will allocate around 10 hours of meeting time with Salesforce resources within predefined duration

**The Deliverables**

**In Scope**

- Configured Salesforce Pardot environment
- Validate technical setup*
- Review Engagement Studio program assets: email template, form, landing page, unsubscribe page and email preference center
- Customize up to 3 default emails, landing pages, and forms; or one of each if migrated
- Review automation and segmentation capabilities
- Introduce Pardot reporting
- Integrate Sales Cloud (if applicable)
- Setup B2B Marketing Analytics and Engage (if applicable)
- Advise on data import, user set up, custom fields, Campaigns

**Out of Scope**

- Process automation - approvals, workflows, etc.
- Integrations
- Advanced Features such as Products, Pricebooks, Quotes configurations, Flows, Process Builder etc
- Custom Code (e.g.: Apex Triggers, Apex Code, Custom Components)
Einstein Analytics Jump Start

See value from Salesforce faster than ever with Einstein Analytics Jump Start

Jump start your Salesforce Einstein Analytics implementation

Get up and running on Einstein Analytics in four weeks or less!

Einstein Analytics enables you to create intelligent experiences across your company and build analytics apps for any of your business needs. This powerful platform helps every user to understand company data, identify trends and share insights.

Using the Einstein Analytics Jump Start, leverage our Analytics experts to import, secure, design, and create an integrated analytics experience. In just 4 weeks, deploy a strategic Analytics app to harness business insights quickly and build a foundation for analytics across your company.

How Jump Start Works

**Overview & Platform Setup**

- **Week 1**
  - Business Needs and Objectives, Success Criteria, User Setup, Platform Setup and Config

**Data Import & Dashboard Design**

- **Weeks 2-3**
  - Import and schedule data flows into the platform. Dashboard designs for mobile and desktop.

**Validate & Knowledge Transfer**

- **Week 4**
  - Finalize implementation and docs, knowledge transfer for stakeholders

The Details

**Price**

USD $20K

**People**

- **Salesforce**: Einstein Analytics Certified Resource
- **Customer**: Key Stakeholders/Decision Makers, Salesforce admin (the main person who will manage and maintain your Salesforce environment & Call Center)

**Prerequisites**

- Customer to provide courtesy/temporary login access
- Customer will provide business overview and configuration requirement overview
- Customer will allocate around 40 hours of meeting time with Salesforce resources within predefined duration
- Licenses: Einstein Analytics Plus or Sales/Service Cloud app licenses

The Deliverables

**Example Customer Outcome**

<table>
<thead>
<tr>
<th><strong>Data Source(s)</strong></th>
<th>2-3</th>
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<tr>
<td><strong>Persona(s)</strong></td>
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<tr>
<td><strong>Dataset(s)</strong></td>
<td>2-3</td>
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<tr>
<td><strong>Dashboard(s)</strong></td>
<td>Up to 3</td>
</tr>
<tr>
<td><strong>Iteration(s)</strong></td>
<td>4 weeks (20hrs/week)</td>
</tr>
</tbody>
</table>

**Always Included**

- Security (User, app, data)
- Knowledge transfer
- Functional & technical documentation
- Deployment to production

**Scope Restrictions**

- The outcomes outlined above are a guide only. Specific goals and outcomes of the 4 week engagement will be agreed upon during the Business Workshop.
See value from Salesforce faster than ever with

Marketing Cloud Jump Start

Jump start your Salesforce Marketing Cloud implementation

Get up and running on Salesforce Marketing Cloud in six weeks or less!

Congratulations on choosing Marketing Cloud to help you better listen to and engage with your customers. As you prepare for launch, you probably want to hit the ground running with a quick implementation that sets up your Digital Marketing team for long-term success.

That’s where Jump Start can help! You’ll receive a tailored setup, expert guidance, and even shadowing sessions from a top-level expert who knows Salesforce and Marketing Cloud better than anyone. Your Jump Start implementation is designed to get you up and running on Marketing Cloud in under 6 weeks - setting you up for success with Salesforce both now and for the long run.

How Marketing Cloud Implementation Jump Start Works

The Details

Price
USD $20,000

People
- **Salesforce**: Marketing Cloud Certified Resources
- **Customer**: Key Stakeholders/Decision Makers, Salesforce admin (the main person who will manage and maintain your Marketing Cloud instance)

Prerequisites
- Pro or Corporate Marketing Cloud License (including SAP)
- Identified Single Domain for sending messages (ex email.domain.com)
- Identified external data source & data layout
- Around 10 hours of meeting time for Salesforce resources with your key business stakeholders

The Deliverables

In Scope
- Discovery and documentation of your Marketing use cases and customer personas to guide implementation architecture
- Production ready instance of Marketing Cloud
- Integration of one data source of your choosing
- Marketing Cloud Enterprise Business Unit Configuration
- SAP and Basic Reply Mail Management (RMM) Configuration
- Data Configuration
- Supporting Data extension (Maximum of 25 fields)
- Technical Quality Assurance Assessment

Out of Scope
- Additional Data Configuration (Import, Extract, API)
- Additional Business Unit Configuration
- MC sub-application configuration (Studios & Builders)
- External Integrations
- Salesforce Connector configuration (optional add-on)
- Journey Builder configuration (optional add-on)
- IP Warming Plan/Monitoring
See value from Salesforce faster than ever with

Marketing Cloud Jump Start
Journey Builder

Jump start your Salesforce Marketing Cloud implementation

Set up Journey Builder on your new Marketing Cloud Instance

Congratulations on choosing Marketing Cloud to help you better listen to and engage with your customers. Now that you have your Marketing Cloud instance set up, you probably want to create new customer journeys using Journey Builder.

That’s where Journey Builder Jump Start can help! We’ll help you create a single, foundational journey that addresses your business goals. Your Jump Start implementation is designed to get you up and running on Journey Builder in under 4 weeks - setting you up for success with Salesforce both now and for the long run.

How Journey Builder Jump Start Works

Meeting 1: Kick Off & Discovery Call
Meeting 2: Journey Map Session
Meeting 3: Contact Model Overview
Meeting 4: Journey Overview and Test Planning
Meeting 5: Journey User Acceptance
Meeting 6: Final Walk-Through & Next Steps

60 Mins
60 Mins
60 Mins
60 Mins
60 Mins
60 Mins

The Details

Price
USD $5,000

People

- Salesforce: Project Manager, Solution Architect
- Customer: Channel Manager

Prerequisites

- Marketing Cloud configuration has been completed
- Customer has Journey Builder enabled on their account
- Email channel is configured
- Customer provides customer insights including personas and segmentation rules
- Customer provides high-level diagram of data flows
- Customer creates Journey emails within Marketing Cloud

The Deliverables

In Scope

- Deploy one journey template of customer’s choice: Anniversary Send, Birthday Journey with Coupon, Welcome Journey, or Welcome Journey with Engagement
- Configuration of one customer interaction with up to 15 steps
- Configuration of contacts model with up to three data sources
- Configuration and testing of one triggered event
- Coding of one email to support personalization

Out of Scope

- Configuration of Marketing Cloud Connector
- Review of more than two data sources
- Review of more than one channel
- Coding of more than one email to support personalization and dynamic content
Set up Salesforce Connector on your new Marketing Cloud Instance

Congratulations on choosing Marketing Cloud to help you better listen to and engage with your customers. If you’re already using one of the other Salesforce clouds, like Sales, Service, Financial Services, or Health Cloud, tie your data into your customer engagement through Marketing Cloud.

That’s where Jump Start can help! You’ll receive a production ready connection between Marketing Cloud and a single instance of the Force.com platform (Sales, Service, FSC, Health Clouds) in under 3 weeks (20 Hours Total) - setting you up for success with Salesforce both now and for the long run.

How Salesforce Connector Jump Start Works

The Details

Price
USD $5,000

People
- Salesforce: Project Manager, Technical Architect, QA Specialist
- Customer: Product/Project Owner, Marketing User, Technical User

Prerequisites
- Pro, Corporate, or Enterprise Marketing Cloud License
- Configured production marketing cloud business unit
- Identified business unit for connection
- Identified SFDC Objects for Synchronization
- Identified fields required for synchronization

The Deliverables

In Scope
- One Marketing Cloud Enterprise connected to one Salesforce Org (Sales, Service, Financial Services, or Health Cloud)
- Three synchronized data extensions based on three core objects
- Maximum of 30 fields across DE’s
- One hour of consulting/troubleshooting assistance with clients Salesforce Admin

Out of Scope
- More than three Synchronized Objects
- More than 30 synchronized fields
- Additional MC application configuration
- Setup of Salesforce.com workflows and reports