

See results from Salesforce faster than ever with

Salesforce Jump Start



We know you want to see value from Salesforce fast – and you want to get your platform set up right the first time around. That's where the Salesforce Jump Start program can help.

How It Works

Quick and Flexible Implementation

Deploy Salesforce within weeks by meeting with our experts, who can help you maximize efficiency.

Tailored to Your Business

Configure your end-to-end business and processes. And boost team efficiency with guidance and setup.

Best Practices for Success

Get your team up to speed with guided walkthroughs, as well as 30, 60, and 90-day recommendations.

Ready To Learn More?

Get to know more about the features, deliverable, and process of each specific Jump Start. Click your product of choice below to visit the datasheet.

Sales Cloud

Service Cloud

Pardot

TabCRM

Datorama: Email Performance

Datorama: Media Performance

Marketing Cloud

Jump Start Maps Growth: Live Tracking

Jump Start Maps Growth: Maps

Jump Start Growth: Territory Planning

Jump Start Maps Plus: Maps Advanced

Jump Start Maps Plus: Territory Planning

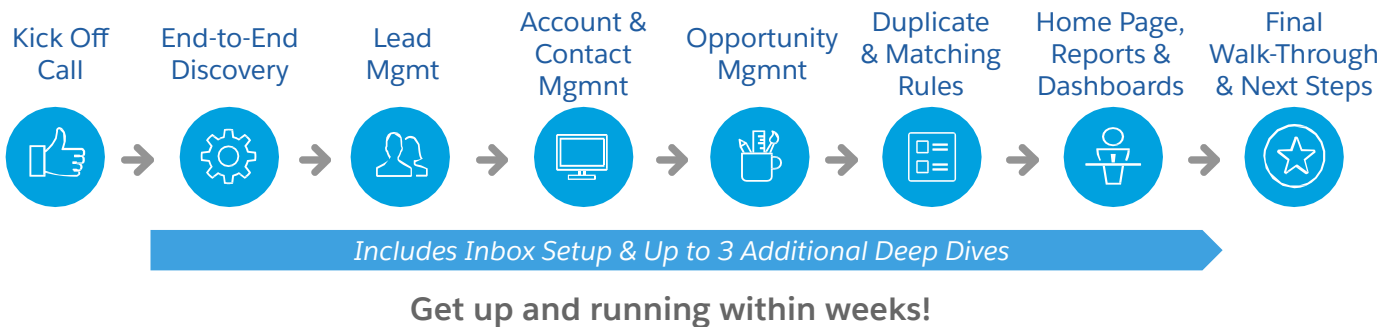
Achieve Sales Excellence faster than ever with Sales Cloud Jump Start



You've made a great decision to connect with your customers in a whole new way. As you prepare for launch, you probably want to hit the ground running with a quick implementation that sets up your Sales team for long-term success.

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 within weeks - so you can speed your time to value with Salesforce.

How Sales Cloud Jump Start Works



The Details

Price

\$5,000 USD (20 hours delivered by your expert)
Price may vary by location. Ask your Account Executive for details.

People

- **Salesforce:** Salesforce Certified Partner
- **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 8-10 hours of meeting time with Salesforce resources within predefined duration
- Supported Gmail/Outlook Servers/Browsers

The Deliverables

In Scope

- Configured Sales Cloud environment
- Setup of 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 3-5 Reports & 1-2 Dashboards
- Standard Duplicate & Matching Rules
- Salesforce Inbox Setup
 - Outlook 365 or Gmail integration (No Legacy servers/browsers)
- 3 - 45 minute Deep Dives (up to 2 hours)
 - Advise on standard out the of box products, data import, or extra time on in-scope items.

Out of Scope

- Data Migration & Data importing
- 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)
- End User Inbox Training
- Lightning Sync, Einstein Activity Capture & Sales Cloud Einstein

Achieve Customer Service excellence faster than ever with

Service Cloud Jump Start



You've made a great decision to connect with your customers in a whole new way. As you prepare for launch, you probably want to hit the ground running with a quick implementation that sets up your Customer 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 within **weeks**- setting you up for success with Salesforce both now and for the long run.

How Service Cloud Implementation Jump Start Works



Get up and running within weeks!

The Details

Price

\$5,000 USD (20 hours delivered by your expert)

Price may vary by location. Ask your Account Executive for details.

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
- 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 custom profile and users
- 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
- 3 Standardized quick actions (Case closed, Spam case closure, & Update case)
- Set up Web-to-Case and Email-to-Case (Configuration only)
- 3 Standard MACROS
- Advisory/Guidance on:
 - Data Migration & Omni Channel
 - Knowledge configuration setup & guidance
- Customer Satisfaction Survey setup
- Self-Service setup (If applicable)
- Custom Service Cloud Reports & Dashboards
- Expert Deep Dives (Up to 3)

Out of Scope

- Integrations & Entitlements
- Custom Code (e.g. Apex Triggers or Code, Custom Components)
- Data and Knowledge Migration
- Full Knowledge and Omni-Channel Configuration
- CTI
- End user training
- Chat & SMS Channel

Achieve Marketing Excellence faster than ever with

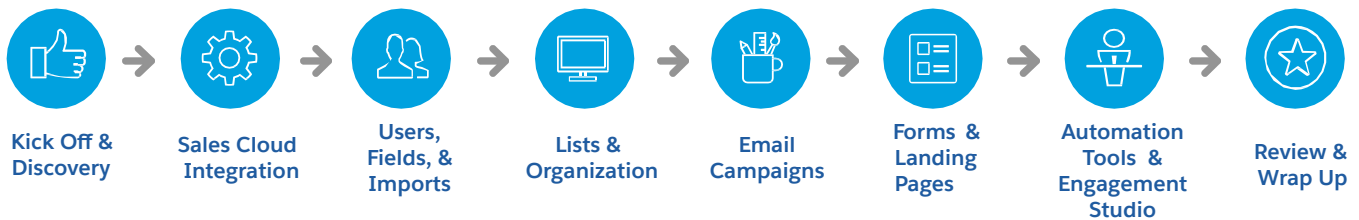
Pardot Jump Start



You've made a great decision to connect with your customers in a whole new way. 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 Pardot within weeks** - setting you up for success with Salesforce both now and for the long run.

How Pardot Jump Start Works



Get up and running within weeks!

The Details

Price

\$5,000 USD (20 hours delivered by your expert)
Price may vary by location. Ask your Account Executive for details.

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
- Create 1-3 Snippets
- 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
- Up to 3 Deep Dives with your expert

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)
- Work or training in Sandbox environment
- Multiple Business Units/Selective Syncing
- Pardot Einstein Analytics or Salesforce Reporting

Harness strategic analytics faster than ever with

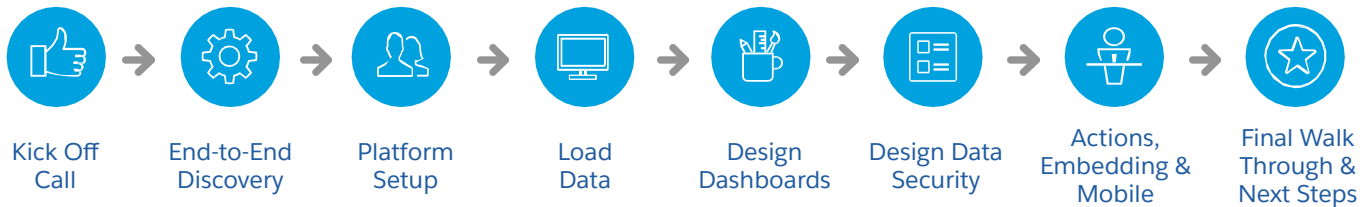
TabCRM Jump Start



TabCRM 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 TabCRM 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 TabCRM Jump Start Works



Get up and running within weeks!

The Details

Price

\$20,000 USD (80 hours delivered by your expert)
Price may vary by location. Ask your Account Executive for details.

People

- **Salesforce:** TabCRM 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: TabCRM Plus or Sales/Service Cloud app licenses

The Deliverables

Example Customer Outcome

- | | |
|------------------|----------------------|
| • Data Source(s) | 2-3 |
| • Persona(s) | 1-2 |
| • Dataset(s) | 2-3 |
| • Dashboard(s) | Up to 3 |
| • Iteration(s) | 4 weeks (20hrs/week) |

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.

Connect and Optimize your email data faster than ever with Datorama Email Marketing Jumpstart

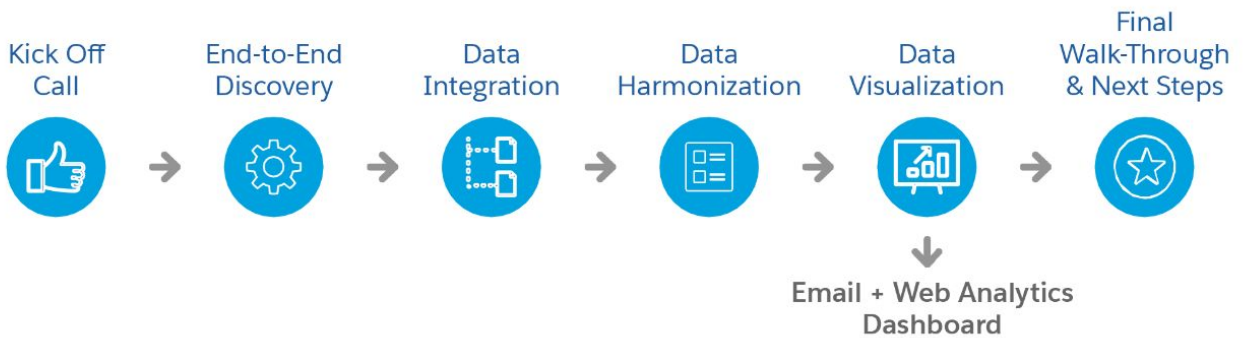


You've made a great decision to connect your email marketing and web analytics data to gain insights on your email marketing performance data. As you prepare for launch, you can hit the ground running with a quick implementation that sets up your marketing team for long-term success.

That's where Datorama Email 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 Datorama better than anyone.

The Datorama Email Jump Start will provide you a best practice dashboard that shows how well your email is driving web activity and conversions on your site. Your Jump Start implementation is designed to get you up and running on Datorama within four weeks, so you can speed your time to value with Salesforce.

How Datorama MPO Jump Start Works



Get up and running on Datorama in under 4 weeks!

The Details

Price

USD \$10K

People

- **Salesforce:** Salesforce Certified Resource
- **Customer:** Key Stakeholders/Decision Makers, Marketing Admin (the main person who will manage and maintain your marketing data analytics)

Prerequisites

- Customer to provide login access to the Email and Web Analytics platforms.
- Customer will provide business overview and configuration requirement overview.
- Customer will allocate up to 4 hours of meeting time with Salesforce resources.

The Deliverables

In Scope

- Setup Datorama Workspace
- Connect and integrate **1 Email Marketing API (SFMC) and 1 Web Analytics API (Google Analytics)**
- Implement all standard and available KPIs
- Harmonize up to **2 dimensions (business unit-and/or tactic-level)**
- Provide up to **2 Classification / categorization** files
- **1 best-practice email marketing and web analytics** performance optimization dashboard page

Out of Scope

- Additional Channel Sources: e.g. Search, Display, Programmatic, CRM, Organic Social, Offline data
- Planning data from Buy platforms
- Custom Widgets and Metrics
- Customized API Connectors
- User/log/cookie-level data

Connect and Optimize your advertising data faster than ever with

Datorama Media Performance (MPO) Jumpstart

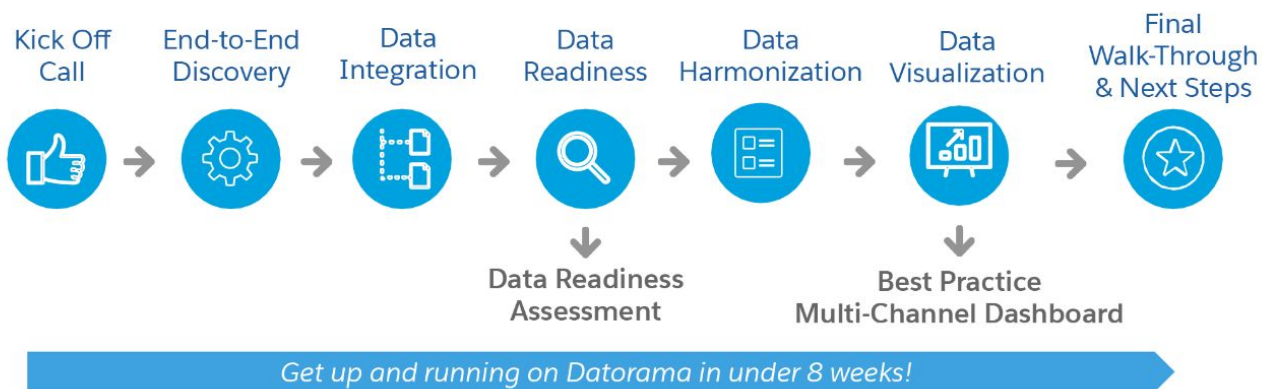


You've made a great decision to connect your digital advertising data to gain insights and optimize your media spend. As you prepare for launch, you can hit the ground running with a quick implementation that sets up your marketing team for long-term success.

That's where Datorama Media Performance Optimization 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 Datorama better than anyone.

The Datorama Jump Start will provide you a best practice **multi-channel dashboard** to show how your channels work together to drive your paid media performance. It also delivers a **data readiness** assessment, which examines the consistency of your data and provides recommendations on how to address the gaps. Your Jump Start implementation is designed to get you up and running on Datorama within eight weeks, so you can speed your time to value with Salesforce.

How Datorama MPO Jump Start Works



The Details

Price

USD \$20K

People

- **Salesforce:** Salesforce Certified Resource
- **Customer:** Key Stakeholders/Decision Makers, Marketing Admin (the main person who will manage and maintain your marketing data analytics)

Prerequisites

- Customer to provide login access to the Paid Media platforms.
- Customer will provide business overview and configuration requirement overview.
- Customer will allocate up to 8 hours of meeting time with Salesforce resources.

The Deliverables

In Scope

- Setup Datorama Workspace
- Connect up to **5 Paid Media API Sources** and **Google Analytics (GA)**
- Implement all standard and available KPIs
- Harmonize up to **2 dimensions (Channel, Campaign)**
- Provide up to **2 Classification / categorization** files
- Perform Data Readiness Assessment
- Provide **1 pre-built paid media performance dashboard** for fast time-to-market analysis

Out of Scope

- Non Paid Digital Media Sources: e.g. CRM, Email, Organic Social, Offline data
- Planning data from Buy platforms
- Custom Widgets and Metrics
- Customized API Connectors
- User/log/cookie-level data



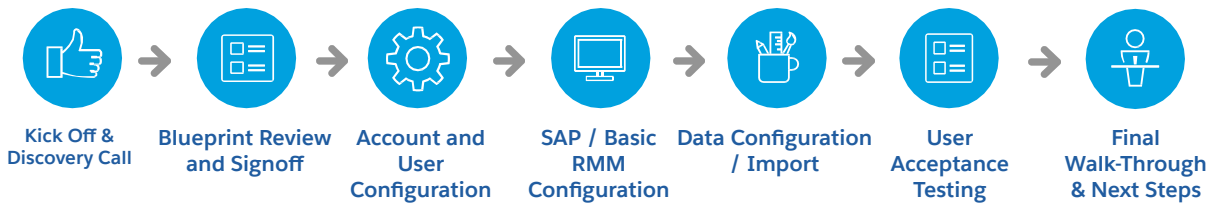
Achieve Marketing Excellence faster than ever with Marketing Cloud Jump Start



You've made a great decision to connect with your customers in a whole new way. 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 within weeks** - setting you up for success with Salesforce both now and for the long run.

How Marketing Cloud Implementation Jump Start Works



Get up and running within weeks!

The Details

Price

\$20,000 USD (80 hours delivered by your expert)
Price may vary by location. Ask your Account Executive for details.

People

- **Salesforce:** Project Manager (13hrs), Solution Architect (20hrs), Technical Architect (40hrs), and QA Specialist (7hrs).
- **Customer:** Key Stakeholders/Decision Makers, Salesforce admin (the main person who will manage and maintain your Marketing Cloud instance)

Prerequisites

- Pro, Corporate or Enterprise Marketing Cloud License (including Sender Authentication Package)
- Identified Single Domain for sending messages (ex email.domain.com)
- Identified external data source & data layout
- Identified customer email to use in QA testing
- Meeting time for Salesforce resources with your key business stakeholders

*See full list of inclusions and exclusions on next page

Achieve Marketing Excellence faster than ever with Marketing Cloud Jump Start



Full In Scope Details

- Discovery and documentation of your Marketing use cases and customer personas to guide implementation architecture
- Production ready instance of Marketing Cloud, including:
 - Verification the account is provisioned properly
 - Configuration of the following account settings, for one (1) business unit:
 - a. Name
 - b. MID (auto assigned)
 - c. Physical mailing address
 - d. Time zone
 - e. Date format
 - f. Default sender email display (email display name)
 - g. Default sender email address (email reply address)
 - h. Default send classification
 - i. Configuration of one (1) standard header and footer (includes View As Webpage and CAN-SPAM footer) (if applicable)
 - Sender Authentication Package (SAP) Configuration, including:
 - a. Private Domain
 - b. One IP address
 - c. Authentication - SFDC with authenticate Customer's email sends with sender policy framework, sender ID, and domain keys/DKIM authentication
 - Enable ExactTarget Subscriber Key as the unique identifier for subscribers
 - Configuration of up to five (5) user accounts, with configuration detail to include: Name, Email, Login Name, and Account Role
 - Configuration of standard Reply Mail Management (RMM), a mechanism to control the messages Customer receives back from its subscribers
 - Configuration of one (1) HTML paste email for testing purposes
 - Perform one (1) test send walk-through with Customer of one (1) static email for enablement purposes
 - Import of one (1) data source to a single list or data source to a single list or data extension (maximum of 25 fields)

Full Out of Scope Details

- Additional Data Configuration (Import, Extract, API)
- External Integrations with third party applications (e.g., CRM, web analytics)
- Additional Business Unit Configuration
- IP Warming Plan/Monitoring
- Real-time triggered emails
- Relational data design
- Complex email formats for test sends
- Dynamic content via AMPscripting or SQL queries
- Consultation on or development of API code
- Creation or configuration of email content or templates, including HTML development
- Creation, configuration, or hosting of landing pages
- Setup or configuration of custom profile, subscription center or preference center pages
- Import of multiple data sources
- Data transformation, cleansing, aggregation, or de-duplication of import or exports
- Provisioning and configuration of a separate test (sandbox) environment within ExactTarget Services
- Creative or design services
- Development of a process to synchronize assets between QA and production environments
- MC sub-application configuration (Studios & Builders)
- Salesforce Connector configuration (optional add-on)
- Journey Builder configuration (optional add-on license permitting)

Salesforce Maps Jump Start Growth

Live Tracking



Get up and running with **Live Tracking** in a matter of weeks!

Congratulations! You've made a great decision to use Salesforce Maps to connect with your field representatives in a whole new way. With this quick and easy implementation service, you'll receive a tailored setup, expert guidance, and even up to **3** additional deep dive sessions from a Salesforce Maps expert. Your Jump Start implementation is designed to get you up and running on Live Tracking within **4 weeks** - so you can speed your time to value with Salesforce.

How Jump Start Growth Works For Live Tracking



Details

Price

\$5K USD - 20 hours delivered by your expert over 4 weeks

Audience

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

Prerequisites

- Customer has Live Tracking licenses available
- Customer to provide courtesy/temporary Login access
- Customer will provide business overview and configuration requirement overview
- Customer will allocate at least **10 hours** of meeting time with Salesforce resources within predefined duration

Deliverables

In Scope

- Installation of Maps/Live Tracking in 1 sandbox and 1 production environment
- Configuration of Maps Live Tracking in 1 sandbox and 1 production environment
- Maps Live layer creation training; Create up to 5 total Live layers
- Provide guidance for insert of Maps Live Tracking records
- Provide guidance for Maps Live Tracking Daily Summary configuration
- Report on Live Stop Associations; Configure 1 Salesforce Stop Association Report
- Custom fields needed to configure use-case(s)
- Advise on standard out of the box Live Tracking features

Out of Scope

- Process Automation
- Data Import
- Custom Code
- Direct End-User Training
- Assignment of Salesforce Maps licenses and permissions in Production
- Advise on Maps features **not** related to Live Tracking

Salesforce Maps Jump Start Growth

Maps



Get up and running with **Salesforce Maps** in a matter of weeks!

Congratulations! You've made a great decision to use Salesforce Maps to connect with your customers and field representatives in a whole new way. With this quick and easy implementation service, you'll receive a tailored setup, expert guidance, and even up to **3** additional deep dive sessions from a Salesforce Maps expert. Your Jump Start implementation is designed to get you up and running on Salesforce Maps within **4 weeks** - so you can speed your time to value with Salesforce.

How Jump Start Growth Works For Salesforce Maps



Details

Price

\$5K USD - 20 hours delivered by your expert over 4 weeks

Audience

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

Prerequisites

- Customer has Maps licenses available
- Customer to provide courtesy/temporary Login access
- Customer will provide business overview and configuration requirement overview
- Customer will allocate at least **10 hours** of meeting time with Salesforce resources within predefined duration

Deliverables

In Scope

- Installation of Maps managed package in 1 sandbox and 1 production environment
- Configuration of Maps managed package in 1 sandbox and 1 production environment
- Configure up to 3 field sets (Click2Create, Check In/Out, Data/ArcGIS Layer Click2Create)
- Maps layer creation training; Create up to 10 total layers (Marker, Shape, Data, ArcGIS)
- Routes, Schedule, and Mobile guidance
- Measure user adoption; Configure 1 Salesforce Report (Salesforce Maps user adoption)
- Custom fields needed to configure use-case(s)
- Advise on standard out of the box Salesforce Maps features

Out of Scope

- Process Automation
- Data Import
- Custom Code
- Direct End-User Training
- Maps Advanced Routing Guidance/Configuration
- Assignment of Salesforce Maps licenses and permissions in Production

Salesforce Maps Jump Start Growth

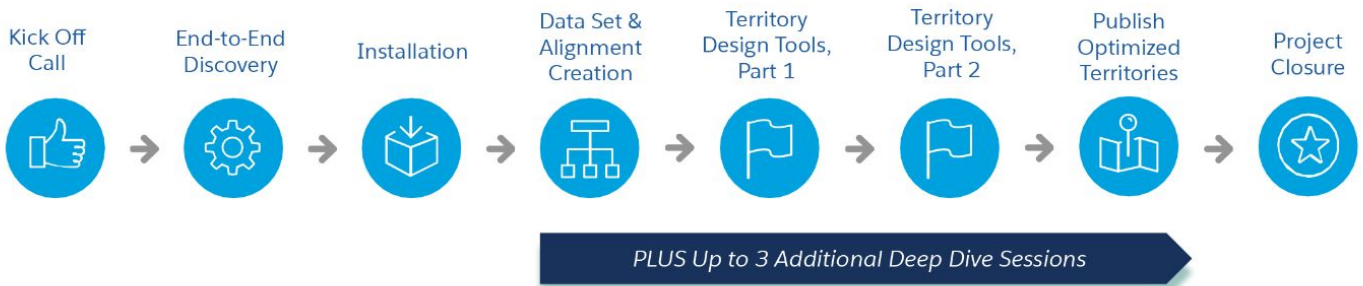
Territory Planning



Get up and running with **Territory Planning** in a matter of weeks!

Congratulations! You've made a great decision to use Salesforce Maps to manage your territories in a whole new way. With this quick and easy implementation service, you'll receive a tailored setup, expert guidance, and even up to **3** additional deep dive sessions from a Territory Planning expert. Your Jump Start implementation is designed to get you quickly enabled on Territory Planning within **4 weeks** - so you can speed your time to value with Salesforce.

How Jump Start Growth Works For Territory Planning



Details

Price

\$5K USD - 20 hours delivered by your expert over 4 weeks

Audience

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

Prerequisites

- Customer has Territory Planning licenses available
- Customer to provide courtesy/temporary Login access
- Customer will provide business overview and configuration requirement overview
- Customer will allocate at least **10 hours** of meeting time with Salesforce resources within predefined duration

Deliverables

In Scope

- Installation and Configuration of Salesforce Maps managed package in 1 sandbox and 1 production environment
- Data set training; create up to 2 custom report types for Data Set reports, 2 Data Set reports, and 2 Data Sets
- Territory alignment training; create 2 territory alignments
- Geo unit upload training; create 1 territory geo unit report
- Territory optimization & publish training
- Shape Layer visualization & Auto-Assignment configuration training
- Create 1 change set (if necessary)
- Advise on train-the-trainer methods and best practices
- Advise on standard out of the box Territory Planning features

Out of Scope

- Configuration of Salesforce Maps functionality other than Shape Layers and Auto-Assignment
- Configuration of Enterprise Territory Management (ETM)
- Process Automation
- Data Import/Update
- Custom Code
- Direct End-User Training
- Assignment of Salesforce Maps licenses and permissions in Production

Salesforce Maps Jump Start Plus

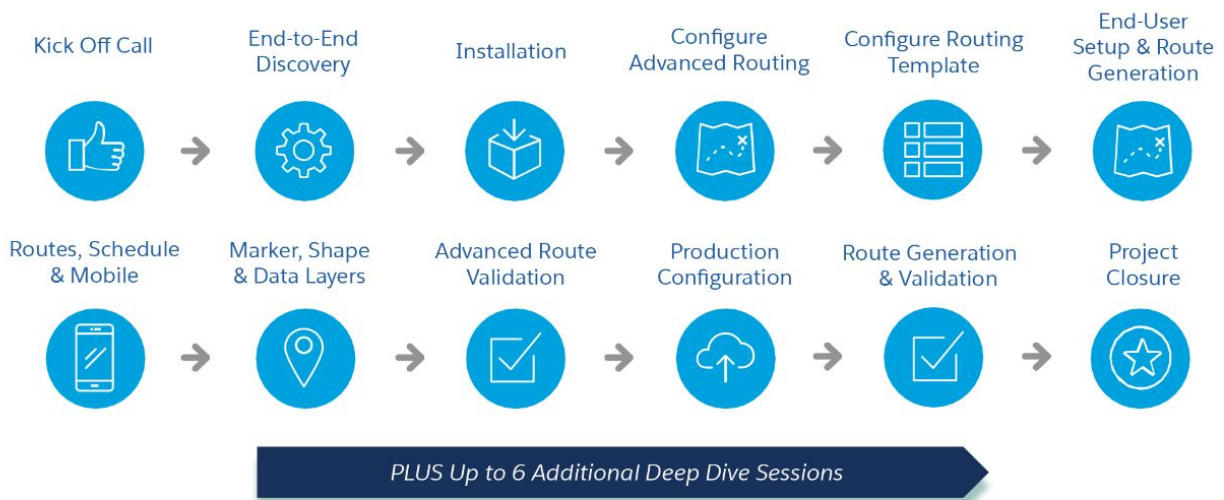
Maps Advanced



Receive expert-led guidance to get up and running with **Salesforce Maps Advanced!**

Congratulations! You've made a great decision to use Salesforce Maps to connect with your customers and field representatives in a whole new way. This Jump Start Plus is designed to get you up and running on Salesforce Maps Advanced with an added focus on **Advanced Routing** within **8 weeks** - so you can speed your time to value with Salesforce.

How Jump Start Plus Works For Maps Advanced



Details

Price

\$10K USD - 40 hours delivered by your expert over 8 weeks

Audience

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

Prerequisites

- Customer has Maps Advanced licenses available
- Customer to provide courtesy/temporary Login access
- Customer will provide business overview and configuration requirement overview
- Customer will allocate at least **19 hours** of meeting time with Salesforce resources within predefined duration

Deliverables

In Scope

- Installation and Configuration of Salesforce Maps managed package in up to 4 sandboxes and 1 production environment
- Configure up to 3 field sets (Click2Create, Check In/Out, Data/ArcGIS Layer Click2Create)
- Maps layer creation training; Create up to 10 total layers (Marker, Shape, Data, Live, ArcGIS)
- Routes, Schedule, and Mobile guidance for success
- Provide guidance and best practices for Maps Advanced route visit frequency, Maps Live Tracking Daily Summary configuration & insert of Maps Live Tracking records
- Configure Maps Advanced Visit Window custom button
- Configuration of 1 Maps Advanced Routing Template
- Creation of 2 Salesforce reports for route optimization validation
- Measure user adoption; Configure 1 Salesforce Report (Salesforce Maps user adoption)
- Custom fields needed to configure use-case(s)
- Create up to 4 change sets (if necessary)
- Advise on standard out of the box Salesforce Maps features

Out of Scope

- Process Automation
- Data Import
- Custom Code
- Direct End-User Training

Salesforce Maps Jump Start Plus

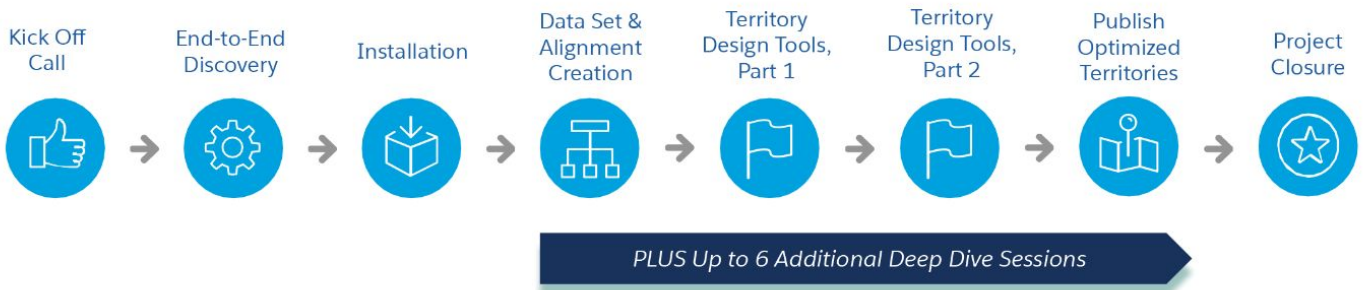
Territory Planning



Receive expert-led guidance to set up **Territory Planning** involving multiple territories!

Congratulations! You've made a great decision to use Salesforce Maps to manage your territories in a whole new way. This Jump Start Plus is designed to get you up and running on Territory Planning with an added focus on receiving **extra time** with a Territory Planning expert, so you can truly feel comfortable as an administrator and get maximized value within **8 weeks**.

How Jump Start Plus Works For Territory Planning



Details

Price

\$10K USD - 40 hours delivered by your expert over 8 weeks

Audience

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

Prerequisites

- Customer has Territory Planning licenses available
- Customer to provide courtesy/temporary Login access
- Customer will provide business overview and configuration requirement overview
- Customer will allocate at least **13 hours** of meeting time with Salesforce resources within predefined duration

Deliverables

In Scope

- Installation and Configuration of Salesforce Maps managed package in up to 4 sandboxes and 1 production environment
- Data set training; create up to 2 custom report types for Data Set reports, 2 Data Set reports, and 2 Data Sets
- Territory alignment training; create 4 territory alignments
- Geo unit upload training; create 1 territory geo unit report
- Territory optimization & publish training
- Shape Layer visualization & Auto-Assignment configuration training
- Configure Auto-Assignment
- Create up to 4 change sets (if necessary)
- Advise on train-the-trainer methods and best practices
- Advise on standard out of the box Territory Planning features

Out of Scope

- Configuration of Salesforce Maps functionality other than Shape Layers and Auto-Assignment
- Configuration of Enterprise Territory Management (ETM)
- Process Automation
- Data Import/Update
- Custom Code
- Direct End-User Training
- Assignment of Salesforce Maps licenses and permissions in Production