

salesforce sales cloud™ performance tuning

Optimization - Training - Support
Two week implementation



Are you getting a good return on your Salesforce investment?

Salesforce is the most feature-rich and powerful CRM in the world, yet we find most organizations are only utilizing a fraction of the capabilities of the platform. With three releases a year, it is easy to fall behind, especially if the implementation was done in house or years ago.

Lightning: the future is now!

If you are not using Lightning, your organization is missing out. Quite simply, Lightning is where the best new productivity enhancing functionality is coming, and it addresses many of the common complaints we hear about Salesforce.

If you tried Lightning a couple months or years ago and didn't like it or couldn't adjust to the new interface, it is time to bring in Summit Technologies to optimize Lightning for your organization and show your users the tips and tricks that will turn them from doubters into

enthusiastic Lightning evangelists like we are!

What's included?

Aimed at SMB's who have been using Salesforce for a while, we have put together an affordable package of optimization services that will make your sales team more productive and excited to use Salesforce!

Here are a few of the highlights of our performance tuning service:

- Discovery session with a senior Salesforce consultant- we will review with you how you are currently using Salesforce to determine areas for optimization and to use more of the pre-built Salesforce functionality
- Lightning implementation or optimization - if you are not using Lightning, we will get you converted. If you are already, we will optimize the screens in ways you never knew possible, based on over 50 Lightning implementations we have done, that will make them more intuitive and easier to navigate
- Improve data summaries and visibility - we can create rollups of sales data on accounts and formulas to help determine

account health or other important metrics

- Process automation- we will look for ways to automate routine tasks in Salesforce from simply changing an Account type to Customer when an Opportunity closes to complex processes like creating new customer onboarding tasks and assigning them to your operations team
- Optimize your sales processes- if you are not using Products and Quotes, we will see if they are a good fit. If you are, we will optimize them to make creating a new quote or opportunity much faster by defaulting fields to data from the Account or other records or common values you use.
- Create new reports and dashboards- we will discuss the important KPI's in your organization and create reports and dashboards to help visualize these KPI's and automatically push them out to important stakeholders like managers or executives.
- After your system has been tuned and optimized, we will lead a training session for your team to show them all the great features in Salesforce they may not have been aware of that will allow them to work faster and to personalize their Salesforce experience.

Performance Tuning
\$4,500

Discovery/Business Process Review

Lightning Implementation and Optimization

Create Formulas and Rollup Fields as Needed

Create Process Automation as Needed

Optimize Sales Processes

Implement Quotes and Products as needed

Create reports and dashboards as needed

Provide advanced Salesforce user training

30 Post Implementation Support

2 Hours Post Implementation Follow-up



registered consulting
partner



Call us today! 614-859-6543
Visit us at summittechnologiesllc.com

v.0717 Prices subject to change
See website for current pricing