

Salesforce Implementation Accelerators



Centric's Implementation Accelerators include packaged catalyst options to increase the velocity of a Sales or Service Cloud implementation. The accelerators are designed to provide a strong foundation for the future maturity of the Salesforce platform while offering options for change management and integration.

Ideal Accelerator Candidates Have

- Enterprise or Unlimited Edition Salesforce Licenses
- 25 - 75 Users (regardless of license type or Cloud)
- Sales Cloud or Service Cloud
- Predefined Sales and Support Processes



SALES CLOUD

Standard Object Configuration

- Lead
- Lead Assignment
- Duplicate Management
- Campaign Management
- Campaign Influence
- Account and Contacts
- Contact Roles
- Opportunities
- Sales Process
- Task and Activity
- Forecasts
- Reports and Dashboards
- 100 Custom Fields
- Chatter
- 50 Flow Elements
- Validation Rules
- Sharing Rules
- Security/User Set-Up Limits

Sales Cloud Out of Scope:

- | | |
|------------------------|-----------------------|
| Web to Lead | Orders |
| Mass Email | Products and Price |
| Email Templates | Books |
| Person Accounts | Quotes |
| Sales Teams | Lead Scoring |
| Calendar All | Opportunity Scoring |
| Salesforce Meetings | Pipeline Inspection |
| High Velocity Sales | Conversation Insights |
| Inbox | Approval Processes |
| Predictive Forecasting | Lightning Conversion |
| Contracts | |



SERVICE CLOUD

Standard Object Configuration

- Case
- Case Assignment Rules
- Case Email Auto Response
- Case Escalation Rules and Queues
- Chatter
- Account and Contacts Management
- Service Console & App Configuration
- Web and Email Case Capture
- Case Milestone Tracker

Service Cloud Out of Scope:

- | | |
|--|--|
| CTI Integration/3rd Party Tools | Email Parsing |
| Digital Engagement | Support Processes Requiring more than 5 Queues |
| Inbound/Outbound Messaging (SMS, WhatsApp, Facebook Messenger) | Approval Processes |
| Chatbots | Lightning Conversion Omnichannel |
| Knowledge (Internal) | |
| Self-Service Portal (Experience Cloud) | |
| Community forum | |
| External Knowledge | |
| Complex Email to Case Routing/ | |

Price: \$75,000

INCLUDED CATALYST PACKAGES

- License Roadmap Application
- Data Governance Dashboards
- Centric's Ticketing Solution
- Starter Sales and Service Cloud User Stories
- Starter Sales and Service Cloud Test Cases

OPTIONAL CHANGE MANAGEMENT WORKSHOPS

Training Plan:

Holistic approach to prepare impacted stakeholders to adopt to the new ways of working.

Change Impact Analysis by Role:

Documentation of the impact of changes for up to 12 roles. The change impact analysis will be leveraged as a contributing document for the training and communication plans.

Communication Plan:

Detailed plan for developing and delivering communications throughout the project lifecycle, including key audiences, delivery vehicles, timing, and feedback mechanisms.

Adoption Narrative:

A narrative documented as a story or bullets that describe the purpose and benefits of the project to the impacted stakeholders. The narrative serves as the foundation for future project communications.

Super User Approach:

Create a plan for identifying and engaging super users in up to 4 impacted functional areas.

Assumptions – Timeline constraints and optional accelerators will cause an extended timeline and an increased cost. The client must be responsive at all times. Sales and Service Cloud together will cause an increase in cost. Out-of-scope items can be assessed and added on at an additional cost. Training will be conducted utilizing a train-the-trainer methodology. This is an estimate only and is subject to change.