

Salesforce Consulting

Resolute Software service offerings

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Current Usage

BUSINESS CASE: B2B or B2C, vertical, channels

PRODUCT: Sales Cloud / Service Cloud / Pardot / Marketing Cloud

EDITION: Professional / Enterprise / Unlimited etc.

LICENSES: Sales Cloud, Service Cloud, Platform etc.

BUSINESS PROCESS OVERVIEW: To be filled in after a discovery call with client / stakeholder

MODULE UTILIZATION: Leads, Opportunities, Cases, Work Orders, Quotes etc.

THIRD-PART SYSTEMS INTEGRATED: Marketing, Accountancy, Document Management, Esign etc.

Vision & Roadmap, Desired Outcome

This is based on a discussion with different stake holders (Sales Manager, Operations, Marketing Manager, Support) on how they envision the system supporting their day to day work, what are the challenges they face, etc.



PROCESS 1

Lead Management
(e.g. – better visibility over the funnel, tracking metrics like conversion rates, Lead quality, Scoring etc.)



PROCESS 2

Lead Management
(e.g. – better visibility over the funnel, tracking metrics like conversion rates, Lead quality, Scoring etc.)



PROCESS 3

Lead Management
(e.g. – better visibility over the funnel, tracking metrics like conversion rates, Lead quality, Scoring etc.)

Objects Utilization Assessment

PRODUCT: **Sales Cloud**

1. Standard objects utilization

Standard Object	Utilized Yes/No	Process	Record Types	Page Layouts	Paths + Guidance	Record Pages	Custom Fields Usage
Lead							
Account							
Contact							
Opportunity							
Products and Price Book							
Quote							
Case							
Campaign							

2. Lead Management

PRODUCT: **Sales Cloud**

Lead	Record Types	Page Layouts	Paths and Guidance	Assignment Rules	Record Pages	Custom Fields	Validation Rules
	Commercial						
	Residential						

3. Account and Contact Management

Account	Record Types	Page Layouts	Record Pages	Validation Rules	Custom Fields
	Channel				
	Direct				

4. Opportunity Management

PRODUCT: **Sales Cloud**

Opportunity	Sales Process	Record Types	Page Layouts	Sales Path + Guidance	Validation Rules	Custom Fields

5. Case

PRODUCT: **Sales Cloud**

Case	Support Process	Record Type	Page Layout	Path + Guidance	Validation Rules	Custom Fields	Assignment Rules + Routing

6. Campaign

Campaign	Record Types	Page Layouts	Campaign Member	Status	Custom Fields	Validation Rules

Third-Party apps

Review all existing integrations – connectors, lightning components, sync flows.

Functional Utilization

1. List Views for Lead, Account, Contact, Opportunities
 - a. Review Sharing
 - b. Inline edit options
 - c. Filters
 - d. Columns
2. Reports and Dashboards
 - a. Review Folder Structures
 - b. Review sample key business metrics reports and dashboards
 - c. Review Dashboards – components, subscribing
3. Review Forecasts and Quota
4. Review Home Screen

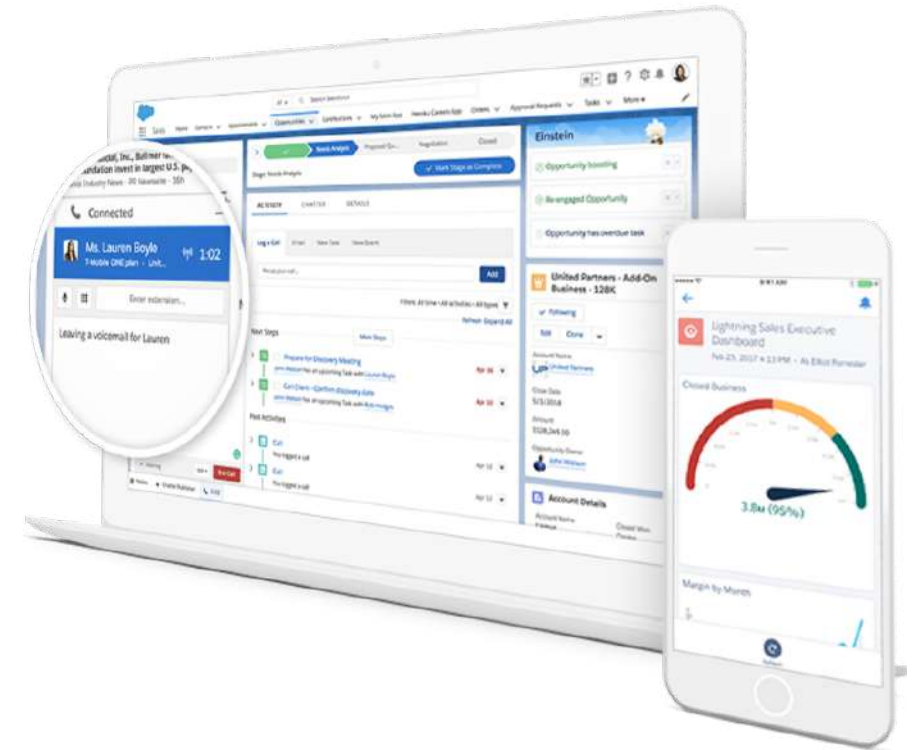
Recommendations

Based on the assessment and analysis conducted identify key aspects of the Sales Cloud modules to be improved or provide recommendations for under-utilized objects to get the most out of the Out-of-the-Box functionalities and give recommendations for objects and process for managing business residing outside of Salesforce.

Choosing Resolute Software you choose an experienced & certified Salesforce consulting partner

With strong expertise across various industries, we've worked with over 200 companies across the globe to help them translate their Salesforce investment into efficient and scalable platform implementations. Our mission is to help you exceed your client's expectations by transforming data into actionable insights and aligning your business processes for success.

Dedication to building successful, long-lasting customer relationships is at the core of our approach. We are your trusted partner who will custom craft business solutions to meet your needs and timeline.



WHY RESOLUTE?

We are a partner that can give you peace of mind

Cross-industry experience

Versed in multiple vertical markets, our experts focus on understanding your business-specific processes and requirements first and foremost. Domain knowledge sits at the core of our expertise.

Global presence

To ensure we stay connected with customers, Resolute Software has established offices in the US, as well as in the EU. This helps us respond to your inquiries around the clock.

A team of seasoned experts

No matter the complexity of your project, it will be handled by a team of highly experienced, senior-level experts who will approach it with professionalism and care, ensuring optimal productivity, efficiency and outcomes.

Transparency

We maintain constant communication and provide weekly updates that include completed project milestones and the status of tasks in progress. You get a weekly project health status check that keeps you informed about the budget and timeline.

We adapt to your needs

By combining agile and waterfall techniques, our team has the flexibility to meet your requirements for managing the project lifecycle. Regardless of the custom approach that we need to employ, we never bill time for training and research.

WHAT?

Our consultants have serious Salesforce Product Expertise

Sales Cloud

The perfect CRM solution for any company growth phase. Powered by sales tools like leads, opportunities, quotes, products and price books.

Pardot

A marketing automation platform designed for B2B. It allows companies to find leads, track marketing campaign engagement and provide adequate and fast prospect follow-up.

Non-profit Cloud

The Non-profit Success Pack helps NGOs manage their programs, constituents, donations and grants, fundraising events, beneficiaries and others.

Service Cloud

Customer support software to help you streamline service team operations. Dramatically improves customer satisfaction and problem resolution rates.

Financial Cloud

World's #1 CRM solution reimagined for financial services. Banks, wealth management and insurance companies can benefit from add-ins like financial accounts, assets, households and goals.

Salesforce Platform

If the standard Salesforce objects and functionalities do not fit your business model, we can leverage the basic Salesforce platform to build your custom app.

AppExchange

The biggest enterprise app store. We can help you install, configure and leverage any app from the AppExchange store.

Marketing Cloud

A digital marketing platform for social media, mobile and email marketing, online advertising and marketing automation. It empowers businesses to create personalized, omni-channel user journeys.

Field Service Lightning

An onsite job management platform with real-time collaboration capabilities. From installations and repairs to professional services and maintenance, FSL streamlines the customer and field agent experiences.

WHAT WE DO?

We are ready to help you solve those problems but also go beyond that



Business process analysis

We review your business processes, provide recommendations on how to leverage Salesforce to improve the efficiency and effectiveness of your operations and implement the proposal into the final solution.



End-to-end implementation

We transition your business processes to the cloud, configuring your system using various automations tools and custom logic.



Data migration and data maintenance

We help you export data from legacy CRM systems or even spreadsheets, streamline it and migrate it into Salesforce while keeping data ownership and relationships aligned. Not confident in the quality of your data? We can analyze the gaps, build a strategy and clean the data.



Integrations

Having trouble building the desired 360-degree view? We are here to seamlessly hook your systems to Salesforce – email marketing, e-signature, order management, phone systems, document management and storage, and more.



Salesforce administration

Already implemented a Salesforce product, but you need a reliable partner to administer, maintain and introduce new functionality to the platform? We'll be your Salesforce administrator to help you guarantee best performance.



Training

We can complement your Salesforce implementation with an end-user training and user-adoption strategy or help gear up your skills for Salesforce products. Need to train an internal Salesforce administrator? We can provide guidance and help them get prepared for the certification exams.



Lightning transition

Looking to make the move to Lightning or want to optimize your current implementation? We will help you get the most out of it.

THE PROCESS

We guarantee full transparency with our Salesforce Project Lifecycle

PREPARE

- Planning & kick off meeting
- Team, goals, responsibilities

BUILD

- Configurations
- Data migration

DEPLOY

- End-user training
- Go live
- User adoption



DESIGN

- Business process review
- Notes/findings review

TEST

- Internal testing
- User acceptance
- Resolve & review
- Training preparation

MAINTAIN

- Support services
- Enhancement & further development
- Continued success

THE CERTIFICATIONS

Our consultants are getting constant certifications and currently possess 10 active certificates



ABOUT

Resolute Software is a boutique IT consultancy
but also a trusted long-term partner

Resolute Software is a high-end IT professional services firm, specializing in helping businesses transform digitally by providing superior quality web, mobile and desktop software experiences.

MISSION

Our mission is to provide our clients superior IT and CRM professional services delivered by expert-level technologists in a transparent manner. Our passion is solving business problems using the right technological tool for the job, every time. We partner with organizations to help them design, build and innovate to succeed in the new digital age.

WHO WE ARE

Resolute Software's team has been hand-picked from the top talent in the industry. Our technologists are all full-time employees, not recruited contractors added on an as needed basis. We praise innovation, excellence and the willingness to go the extra mile to deliver a prescriptive solution to our clients. Our team of A-players takes the time to understand your business, the industry in which you operate and the challenges you face before proposing a plan of action. We take pride in what we do and only deliver superior quality solutions, no matter the size of the project or client.

OUR LOCATIONS

We have global presence

Atlanta

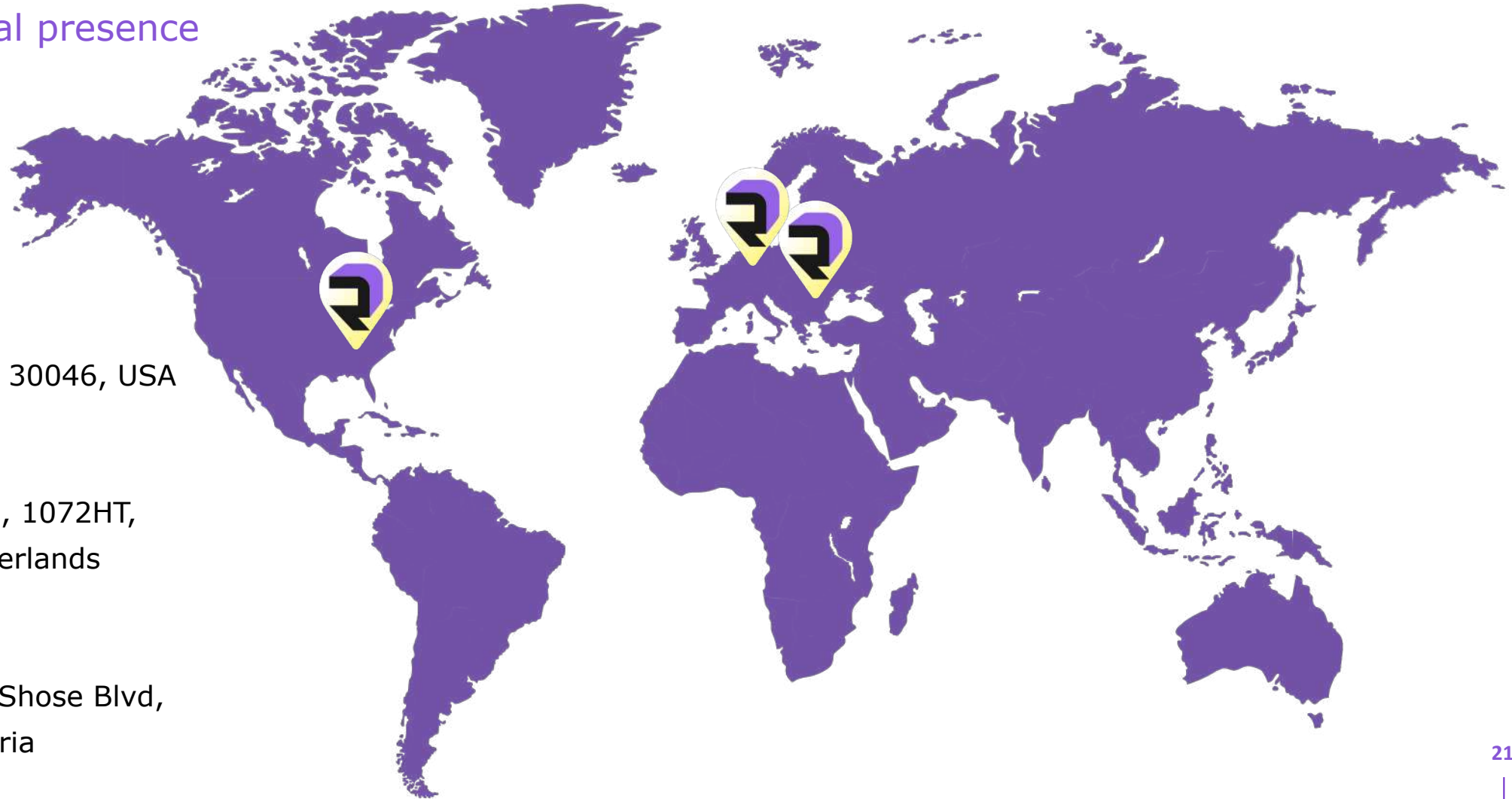
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Amsterdam

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Sofia

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CONTACT US

We are open for business!

Need to speak with our Salesforce experts?

Get in Touch

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We at Resolute Software offer comprehensive software engineering and consulting services by focusing on agile, continuous and predictable delivery of solutions that help you expand your digital footprint. We embrace a challenge and are always ready to go the extra mile to empower organizations to build brilliant digital experiences. Our distinctive approach to software development, passion for building sustainable, future-ready solutions, and commitment to understanding clients' requirements and the ecosystem they operate in, make us your perfect technology partner.

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