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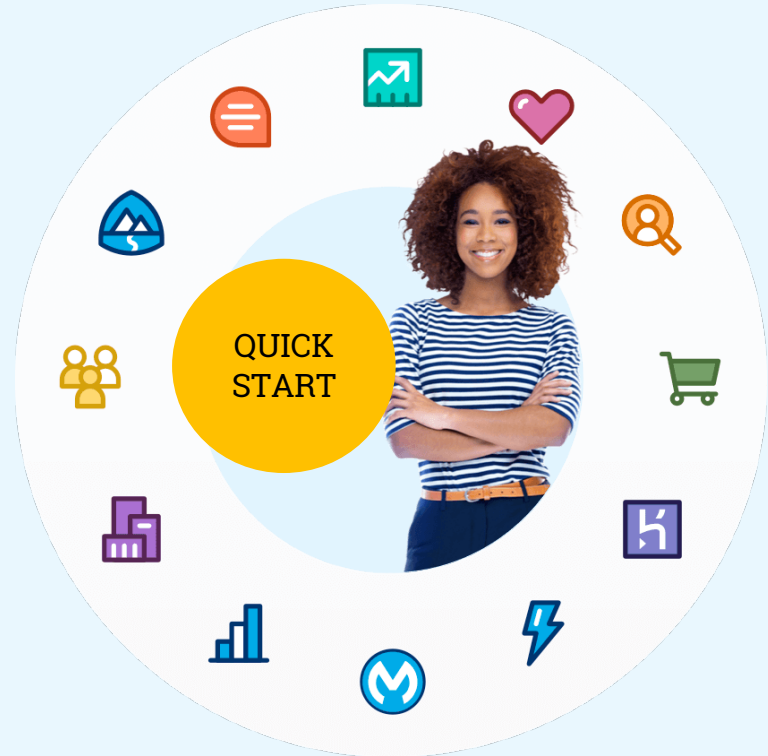
Salesforce Sales Cloud

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The quickest, easiest and safest route to Salesforce Success by Gauri

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QUICK START

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Salesforce Sales CRM

Why Salesforce Sales Cloud is right for you?

As your business grows and your requirements evolve, Salesforce can easily adapt to meet your needs. Leverage the powerful features of Sales Cloud by integrating Marketing Cloud, Service Cloud or Community Cloud or choose from over 5000 powerful third-party apps on the Salesforce AppExchange, the world's largest business applications marketplace.

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Get More Leads

Sales Cloud enables you build your own Lead Machine by helping you track leads from Click to Close, whilst continually optimising your campaigns across every channel. Furthermore, insights from Lead Management help you make smarter decisions about where to invest your time and marketing budget.

Close More Leads

Get a complete view of your customers including, activity history, key contacts, customer communications, and internal discussions. By using these insights you will always stay connected to the right people with the information you need to close more deals.

Less Admin More Selling

Track emails, calls and meetings automatically by syncing key information from your inbox and G Suite to your Sales Cloud instance.

Make Insightful Decisions

Turn your data into actionable insights. Salesforce dashboards and reports offer a real-time picture of your sales pipeline at a glance. Stay on top of your pipeline with fast, easy and accurate Sales Forecasting.

Your Mobile As Portable Sales Office

With Salesforce, speed, intelligence, and personalisation doesn't stop at the desktop when you can access and update your data anytime with the Salesforce mobile app.

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About QuickStart Solution by Gauri

Gauri's QuickStart packages for Salesforce have been designed to help you get up and running quickly at low cost with minimal risk.

Each QuickStart solution is based on well-defined best practices so that you can leverage the platform capabilities and implement sales processes you need as quickly and efficiently as possible.

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You get:

Dedicated Team

A dedicated team of specialists work closely with you to design a CRM system that ensures your ideas and aspirations for CRM becomes a reality. They will support you every step of the way and answer any queries you may have throughout the project.

Onsite Presence

Our experts will conduct on-site discovery workshops to fully understand and scope your requirements then conduct 'show & tell' sessions so you can monitor the progress of the project to ensure it's progressing on-time and to plan.

End-user Training

We provide a customised training plan based on the features and functionalities implemented. Our experts will provide in-depth on-site training once the system is configured and ready for use. Customised user guides will also enable you to quickly find instructions on how to use the system.

Your Mobile or Tablet As A Portable Sales Office

With Salesforce, speed, intelligence, and personalisation doesn't stop at the desktop when you can access and update your data anytime with the Salesforce mobile app.

End-to-end Project Planning & Support

We provide an implementation plan that gives you a complete overview of your projects scope and delivery time line. Upon project completion, we will provide an in-depth technical document that ensures you are technically secure and as self-sufficient as you require.

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Five-step QuickStart Approach

1 Kick-off, discovery and scoping

Gauri's Salesforce expert will work with you to map out the scope of Sales Cloud implementation by understanding your requirements and defining clear actions.

2 Solution Setup & Documentation

At this stage, our team will start setting up your Salesforce Sales Cloud and configure the product to match your business requirements.

3 Show & Tell

We will demo the software features as it is taking shape, take your feedback and make necessary adjustments and refinements.

4 Data Load and Testing

We migrate your data from existing systems and perform comprehensive tests to ensure your application performs as intended.

5 End-user Training & Go-Live

We train your users so they're up and running quickly. You can always count on us for any support backed by robust SLAs for complete peace of mind.

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Our QuickStart Options

Salesforce Objects (Features and Functionalities)

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You get:

Salesforce Objects	Essentials	Advanced
o Leads	Yes	Yes
o Account	Yes	Yes
o Contacts	Yes	Yes
o Opportunities	Yes	Yes
o Activities & Event	Yes	Yes
o Products	Yes	Yes
o Price Books	-	Yes
o Campaigns	-	Yes
o Quotation	-	Yes
o Sales Processes	-	Yes
o Custom Objects	-	Yes

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Our QuickStart Options

Automation and System Configuration (Setup)

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You get:

Automation and General Configuration	Essentials	Advanced
○ Process Builder	2	6
○ Web To Lead	Yes	Yes
○ Lead Assignment Rules	Yes	Yes
○ Approval Process	-	2
○ Territory Management	-	Yes
○ Email Integration (Office 365/Gmail)	Yes	Yes
○ Chatter Set Up	Yes	Yes
○ Multi- Currency	-	Yes
○ Reports	7	20
○ Dashboard	2	5
○ Security: Role Hierarchy	-	Yes
○ Security: Custom Profiles	2	5

Our QuickStart Options

Data Migration and End-User Training Services

You get:

Data Migration and End-User Training (Services)	Essentials	Advanced
o Leads	Yes	Yes
o Account	Yes	Yes
o Contacts	Yes	Yes
o Opportunities	Yes	Yes
o Activities	Yes	Yes
o Products	Yes	Yes
o Quotation	-	Yes
o Custom Objects	-	5
o Design Document	Yes	Yes
o Super User Training	½ Day	1 ½ Days
o Customised Training	-	Yes

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About us

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We're Experts in CRM Solutions.

Gauri are leaders in implementing and supporting CRM Solutions for Sales, Marketing, Customer Support and Field Services. We help our clients transition to Cloud and achieve a true Customer 360 on the world's leading CRM platforms.

We have seen CRM evolve since the 1990's and have worked on emerging CRM technologies such as Salesforce since then. Our years of cumulative experience and QuickStart Solutions have delivered results for our clients. Please call us for sound advice on choosing the right CRM for your business.

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