



EMPAUA

YOUR PARTNER FOR INNOVATION
AND DIGITAL TRANSFORMATION

SALES CLOUD

Quick Start

Convert more leads, close deals faster, and get a global view of your entire organisation's operations.

SALES CLOUD

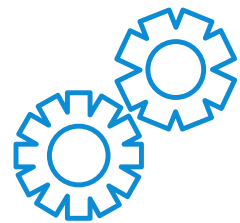
Salesforce Sales Cloud **is a world-leading CRM platform for sales.** With Sales Cloud, you can convert more leads, close deals faster, and get a global view of your entire organisation's operations.

- **Connected Sales Team**
- **Enhanced Processes and Data Source**
- **Convert more Leads and Close Deals Faster**
- **Build Trusted Relationships**



THE WHY & AND THE BENEFITS

- ✓ The EMPAUA Quick Start aims to enable you on Sales Cloud quickly by applying standards and best practices in a pre-structured project.
- ✓ We solve your initial CRM requirements and pain points through technology and process expertise, acquired in over 1200 customer projects.



Quick setup which is based on a scalable processes and technology



Salesforce as the CRM that aligns your Sales Process across your business



EMPAUA best practices from over 1200 completed projects



Quick Start Project with dedicated certified Salesforce Experts



Fixed cost project for Lead to Opportunity process as described in the Statement of Work



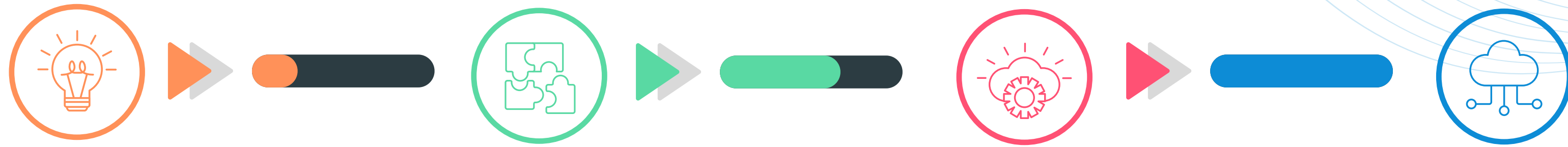
Up and running on Salesforce Sales Cloud in maximum 4 weeks

ASSUMPTIONS & DISCLAIMERS

- 1 All required Salesforce licenses are purchased by the client prior to project kick-off.
- 2 Client names project manager, who coordinates the resources on client-side and sales key user, who provides important insights into the Client Sales Process.
- 3 Third-Party Integration Implementation, such as Conga or DocuSign, can be purchased separately via Add-Ons
- 4 Implementation of API, custom code and data migration can be purchased separately via Add-Ons



EMPAUA'S METHODOLOGY



Discover

- Project Kick-off Session
- Requirements Gathering Workshop

Design

- Attribute definition and Lead to Opportunity flow

Develop

- Configuration of Standard Objects: Lead, Account, Contact & Opportunity
- Page Layouts & List views of named Standard Objects
- Capturing Leads from the Website: Salesforce Web2Lead
- Basic Validation & Duplicate Management setup
- Reports & Dashboards
- User and Profile Setup

Deploy

- Training and User Guide
- Post-Go-Live Support

BEST PRACTICE ROADMAP

A prerequisite for the roadmap is to have all the necessary deliverables at hand. We do recommend a 2-week sprint in order to have the opportunity to also share some knowledge and it's not recommended to stretch the timeline longer than 4 weeks.

WEEK 1 DISCOVER & DESIGN

Project Kick-off Session
Requirements Gathering Workshop
Attribute definition and Lead to Opportunity flow

WEEK 4 DEPLOY

User Guide and Training
Go-Live Support

WEEK 2 & 3 DEVELOP

Basic Configuration I: Salesforce Setup

- Custom App
- Homepage
- Tab Order

Basic Configuration II

- Custom fields, picklist values and page layouts
- Leads
- Accounts
- Contacts
- Opportunities
- Activities

KPIs

- Custom Reports
- Dashboard

- Additional Features
- Web2Lead
- Validation Rule
- Duplicate Rule
- Workflow Rule



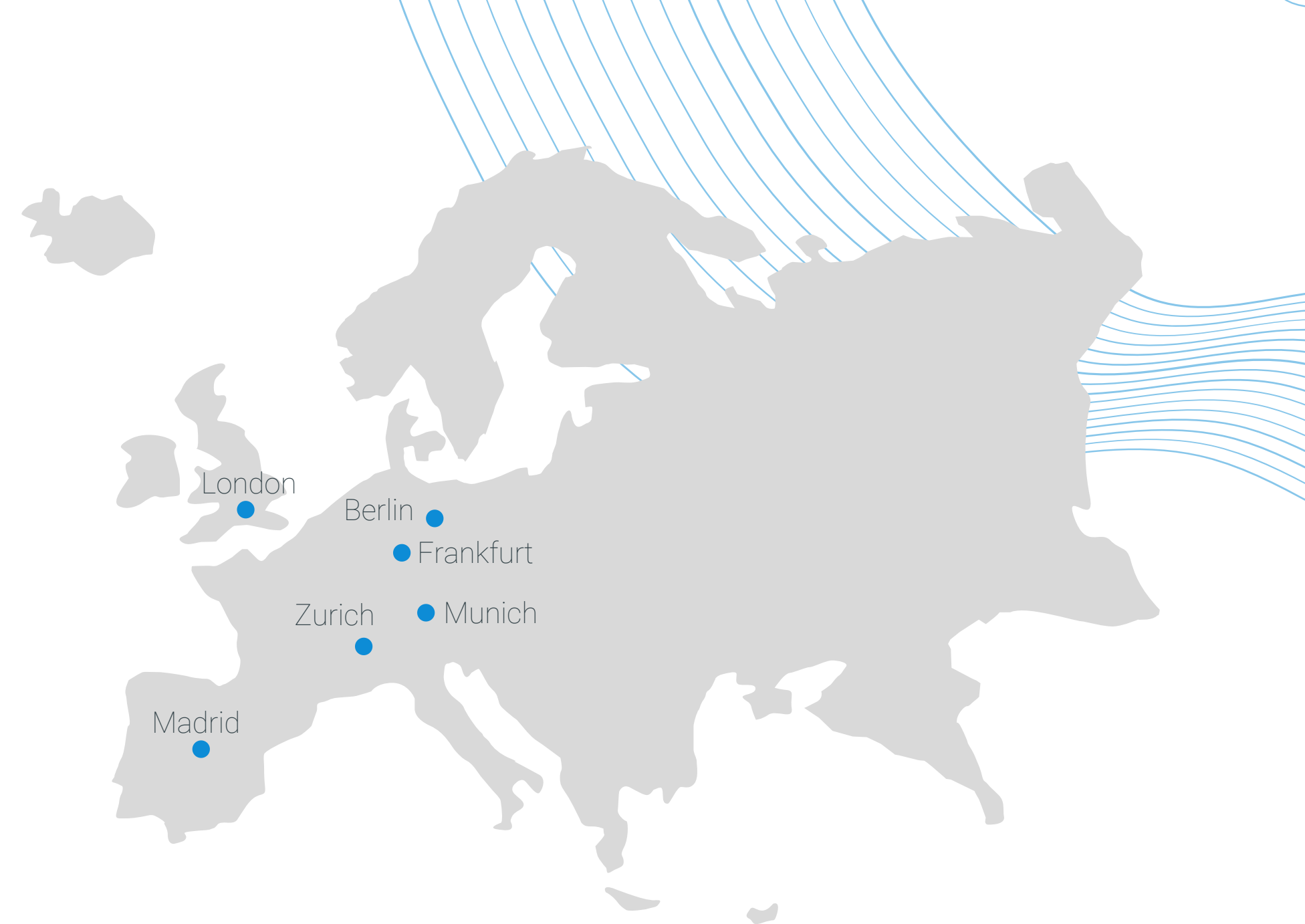
OUR SALESFORCE SOLUTIONS ARE

Disrupting the way organisations operate

EMPAUA is a European digital consultancy with offices in four countries. EMPAUA leverages the Salesforce platform in order to help businesses progress to the next level.

With over 1200 customer projects completed in just 6 years, EMPAUA offers generalist business process experience, as well as deep industry knowledge.

Key industries include Financial Services, Real Estate, Transportation, Property and Real Estate, Health Care and [more](#).



We are close to you

EMPAUA have six offices strategically located around Europe. Find us in London, Berlin, Frankfurt, Munich, Zurich and Madrid.

MEET OUR LEADERSHIP TEAM



Till Klotz

CEO

till.klotz@empaua.com
+49 1747119294



Steffi Kromer

Founder & Managing Director, Switzerland

steffi.kromer@empaua.com
+41 798267521



Sarah Dallimore

Managing Director, UK

sarah.dallimore@empaua.com
+44 07535033053



Florian Evers

Managing Director, Germany

florian.evers@empaua.com
+49 15253339465



EMPAAUA

www.empa.ua