SOLVD
QUICK START PACKAGE

salesforce financial services cloud

PRICING | **TIMELINE**
$9000 | 3 weeks

HOURS
45

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salesforce appexchange

★★★★★

5/5
Star Rating on the Salesforce AppExchange

SOLVD offers time-based billing. Pay only for what you need based on actual time spent. Our quick start offers a discount that results to a $200/hr bill rate.

Allowing your company to be up and running quickly with your new system.

HOW SOLVD HELPS YOU:

PROJECT KICK OFF + STRATEGY SESSIONS
Together we'll discuss your company's business objectives for Salesforce, including a custom plan for your sales and account management processes.

HOUSEHOLD AND CONTACT SETUP
We'll configure households for storing household and family data that is critical to managing your book of business. We'll also setup contacts to manage your individual goals, objectives, and timelines for the services you offer.

OPPORTUNITY SETUP
We'll configure opportunities to be used for deal-tracking so you can see and manage the pipeline with a high amount of detail.

FINANCIAL ACCOUNTS SET UP
We'll configure the financial account record to allow for tracking of daily balances, NAV, asset class, and other information.

SPREADSHEET IMPORT
We'll reformat and import a spreadsheet including contacts, activities, and order history.

SALESFORCE TRAINING
Together our team walks you through your app, this helps with adoption while also getting users the value they need.

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salesforce registered consulting partner

www.SOLVD.cloud