



Statement of Work Salesforce Sales Cloud

Project Title: Optimization of Salesforce Sales Cloud Utilization

Projected Project Duration: 10 hours

Common Project Objectives: (Not limited to)

1. 1. To assess current Salesforce utilization and identify areas for improvement
2. 2. To optimize Salesforce configuration and customize it according to the client's business processes
3. 3. To improve user adoption and provide training to enhance Salesforce utilization
4. 4. To ensure data integrity and accuracy within Salesforce
5. 5. To enhance reporting and analytics capabilities within Salesforce
6. To uninstall any applications not in use
7. To configure or reconfigure page layouts that map to current business process

Tasks and Deliverables:

Initial free consultation (.5 hours)

Initial Assessment (1.5 hours)

- Review the client's current Salesforce setup and configuration
- Identify pain points and areas requiring optimization
- Document current utilization challenges

Deliverable: Assessment Report highlighting areas for improvement and recommendations.

Salesforce Configuration and Customization (6 hours)

- Customize Salesforce layout and functionality to align with the client's specific business processes
- Set up custom fields, objects, and workflows as required
- Configure security settings and permission levels
- Integrate third-party applications if necessary
- Additional items to be defined if necessary

Deliverable: Configured and customized Salesforce platform in accordance with client's requirements.

User Adoption and Training (1 hours)

- Conduct training sessions for users on Salesforce features and best practices
- Assist users in understanding and utilizing Salesforce effectively
- Provide ongoing support and guidance as needed for additional fee

Deliverable: Training recording

Data Integrity and Accuracy (1 hour)

- Review and optimize data quality rules and validation settings
- Develop data cleanup strategies for existing data
- Implement data management best practices

Reporting and Analytics Enhancements (1 hour)

- Identify key performance indicators (KPIs) and reporting requirements
- Create customized reports and dashboards to capture relevant metrics
- Ensure data accuracy and consistency for reporting purposes

Deliverable: Customized reports and dashboards tailored to the client's needs.

Projected Project Cost:

- 10 hours of work at \$200 per hour: \$2000

Note: Any additional project items, deliverables and hours required beyond the scope of this statement of work will be subject to further discussion and agreement. This is for work within Salesforce Sales Cloud and for organizations under 250 employees.

Project Completion:

The project is expected to be completed within the allocated 10-hour timeframe or 5 business days subject to timely provision of required information and cooperation from the client.

Approval:

By signing below, the client acknowledges their agreement with the scope, objectives, tasks, and cost outlined in this Statement of Work.

Client Representative:
[Printed Name and Signature]

Date:

Salesforce Assistance :
[Printed Name and Signature]

Date: