

The CRM manager Plan

Optimize your organization's investment in salesforce.com with retained consulting services from CRM manager. The CRM manager Plan provides certified experts to supplement your existing staff at a fraction of the cost of hiring, managing and retaining full-time salesforce.com expertise.

The salesforce.com technology is designed to grow with your business as your business evolves. The CRM manager Plan is a perfect solution to help companies affordably leverage new salesforce functionality, implement best practices and enhance the application to address changes in your business. The result is increased user adoption and overall usage, helping your organization achieve a higher return on investment.

The CRM manager Plan supports a full range of administrative services. Our certified salesforce consultants are experienced in applying and optimizing salesforce.com technology for maximum business value by understanding your salesforce application and your unique business.

Plans are available with as few as 5 hours of consulting services per month. The Plan includes a monthly review of your application performance and updated project priorities. Customers can also submit and prioritize new work requests and view the status of existing projects at any time through our Customer Portal.

Commonly Requested Services in the CRM manager Plan

Administrator Expertise

- Application Setup & Management
- Activities
- Campaigns
- Leads
- Accounts
- Contacts
- Forecasts
- Cases
- Solutions
- Products & Pricebooks
- Users (Roles & Profiles)
- Reports & Dashboards
- Communication Templates
- Security Controls (Sharing & Access)
- Analytics

Enhancements and Customizations

- Data Migration
- Workflow Rules
- Application Integration
- Outlook/Notes Integration
- Validation Rules
- Data Management
- Mobile Access
- Custom Objects, Fields and Data
- Project Management
- Design Validation
- Partner Relationship Management
- Testing Support (Design and Execution)
- Training

Complete Visibility



Use our Customer Portal to submit work activities/cases and to track the status of open and previous requests.

Assigned Representative	✓	Certified salesforce.com expertise
Service Portal	✓	Direct visibility to the status of current and completed activities (cases); and to request new activity
Unlimited Case Submissions	✓	Use our customer portal to queue and release all of your projects and user requests
Monthly Performance Review	✓	Regular checkpoints on projects, status and priorities
Custom Release Review	✓	We make sure you are prepared to leverage changes and enhancements to the platform
Security Audit and Clean Up	✓	Over time even the best managed application needs to be reviewed
Best Practices Benchmark Review	✓	Real-world examples of the most effective approaches to leveraging salesforce.com technology
Annual Optimization Review	✓	Success is never final, we work with you to ensure your evolving business is aligned

CRM manager LLC, a wholly-owned subsidiary of CRM Services Corporation, is a leading cloud application implementation, integration and optimization firm. CRM manager is a select consulting partner for salesforce.com and is committed exclusively to salesforce.com technology. CRM manager empowers organizations by driving business value through a disciplined approach, leveraging the complete power of cloud computing for sustained business performance. Headquartered in Malvern, PA, the firm offers complete salesforce.com implementations, user training, on-going consulting services (The CRM manager Plan), collaboration programs (ChatterLaunch™) and force.com development. For more information, visit www.crm-manager.net and follow us at www.twitter.com/CRMmanager.