SUGAR JUMP START LITE PACKAGE

Up to 10 Hours

Purpose:

The Jump Start package is designed to accelerate your Sugar implementation. You will work with the Faye Business Systems Group Professional Services team to help with initial set up and configurations.

Audience:

This package is designed for Sugar Administrators. The Introduction and Overview may also benefit a team leader, executive sponsor, or internal trainer. To get the greatest benefit from the Jump Start, we request that all sessions be completed within 30 days of the first session (Introduction and Overview of Sugar).

Key Benefits:

Through hands-on training and coaching, delivered remotely, our team will help you understand and use the features and administrator tools required for immediate and future success with Sugar. You will more easily be able to manage your Sugar instance as well as support existing and future Sugar users in your organization.

The Jump Start package includes the following:

Introduction and Overview of Sugar

- Package overview and objectives
- What it takes to be successful with your CRM implementation (user adoption)
- How Sugar is used to track customer information
- Concepts: Personalization, Configuration, Customization
- Tour of Sugar
- How to prepare for your Discovery Session

Discovery Session

- Review your overall business and CRM objectives
- Determine basic set-up requirements
- Identify the content/scope of your three working sessions

Three Working Sessions

Our team will coach you through how to use and administer Sugar, and will explain best practices for software setup. Topics discussed may include the following:

- Setting up users, teams, and roles
- Email setup
- Guided import
- Creating fields and changing layouts in Studio
- Using Module Builder
- Managing workflows
- Creating basic reports

Wrap-up / Resources / Next Steps

- Summary of work completed
- Recommendations to achieve future objectives
- Helpful links, contacts, and resources

Also recommended is the "Custom Train Your Team" package to complement your Jump Start session.

Please note that this package does not include the following:

- Updates to existing transactions in the production system
- Customizations beyond Studio, Module Builder, Dropdown Editor, and Workflow
- Data migration or basic data imports
- Installation of Sugar or any supporting third-party software