JUMP START ENTERPRISE PACKAGE

40 Hours

Purpose:

The Jump Start Enterprise package is designed to accelerate your Sugar implementation. The Faye Business Systems Group Professional Services team will provide services for importing, initial set up, configurations and training.

Audience:

This package is designed for organizations looking to get up and running with a successful CRM quickly. The Jump Start Enterprise Package is for the organization that does not need custom programming or special integrations. To get the greatest value from the Jump Start Enterprise, we request that all sessions be completed within 30 days of the first session entitled *Introduction and Overview of Sugar.*

Key Benefits:

Through hands-on training and coaching delivered remotely, our team will configure and train you on Sugar for immediate and future success. You will be able to quickly get up and running with a customized CRM system for your organization.

The Jump Start Enterprise package includes the following:

Introduction and Overview of Sugar:

- Package Overview and Objectives
- What it takes to be successful with your CRM
- How Sugar is used to track customer information
- Concepts: Personalization, Customization Configuration
- Tour of Sugar
- How to Prepare for your Discovery Session

Discovery Session - 1 day:

- Discuss business objectives and overview with Key CRM planners to determine best practices
- Uncover CRM user roles
- Define scope of implementation and configuration for fields, security settings, workflows and reports
- Assign Project leaders

Implementation Sessions:

Our team will configure and set up your users and system.
- Email Set up
- Import of one .csv Accounts and Contacts only
- Setting up Users, Teams and Roles
- Configuring 2 Dashboards
- Security setting
- Configuring Fields and Layout using Sugar Studio for Accounts, Contacts, Opportunities and Leads.
- Creating 2 automatic Workflows
- Building 2 Basic Reports

Training (End User and Admin):

- Admin Training (Sugar Studio, Customizing fields, module builder, managing users, roles and teams, importing, creating basic reports and workflows)*
- End user Training *Note, training provided time doesn't extend beyond total package hours

Wrap-up / Resources / Next Steps:

- Summary of Work Completed, recorded training videos
- Recommendations to achieve Future objectives: helpful links, Contacts and Resources

Please note that this package does not include:

- Updates to Existing Transactions in the Production
- Any Associated Travel or Per diem costs
- Data migration beyond above said import
- Code level changes
- Installation of 3rd party or Sugar Software
- Customizations beyond Studio, Module Builder, Dropdown Editor and Workflow