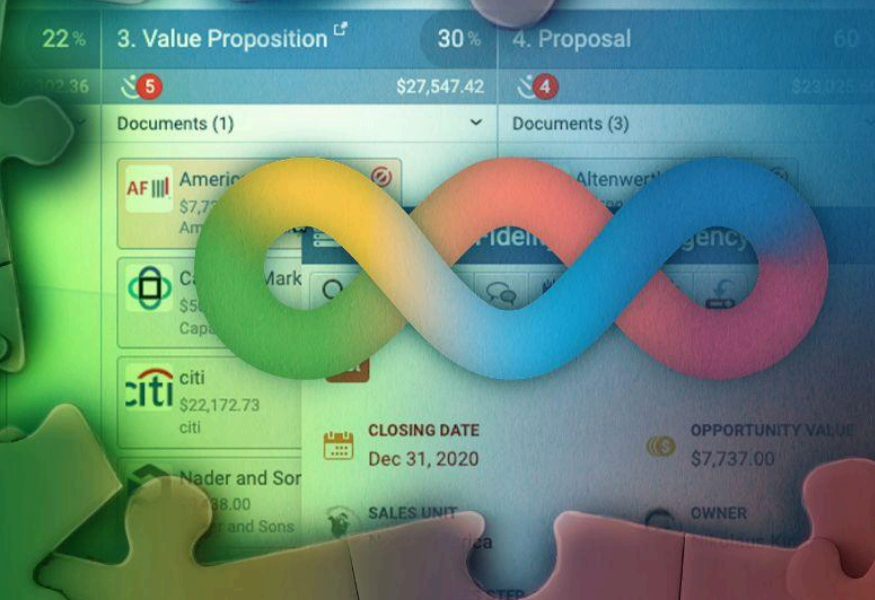




Pipeliner CRM

CORE IMPLEMENTATION



Service Packages • 01

SCOPE OF WORK

Overview

The Pipeliner “**Core Implementation**” package is designed for all new Pipeliner customers and covers the setup of key, basic requirements as the first phase of using Pipeliner. This approach ensures an early return on investment with your users actively using the system after only a few weeks and allows your implementation to evolve during follow-up phases as your experience with Pipeliner grows, making sure you can take advantage of more advanced features at the appropriate time. A *Core Implementation* usually has a timeline of approximately 6 weeks from beginning to Go Live, which is when the first User Training is delivered (*please note that this does not include time that you will need to clean up and prepare any data that will be imported prior to training*).



Our *Core Implementation* package is the first part of our “**Infinity Onboarding**” model which encourages a practice of regular review and optimisation of your Pipeliner CRM system to ensure that it continues to evolve and expand to meet the needs of your business.

Consultancy/Workshops

The project team will collaborate in a series of consultancy sessions/workshops designed to guide you through what’s required to configure your Pipeliner space in a structured way. Topics are introduced in a logical progression, building on previous elements. This approach builds your internal knowledge about Pipeliner and how it works as the implementation progresses, helps establish confidence for all participants

and is designed to enable your project team to act as “**Champions**” within your organisation.

After the initial Introductory meeting to review Pipeliner and provide guidance regarding requirements and to establish objectives and success criteria, there will be several follow up *Consultancy* sessions to review the prototype build as it progresses and to discuss and advise on additional requirements for the specification. **A maximum of 5 consultancy sessions is included in this package.**

“Core” Configuration

The initial “**core**” configuration of Pipeliner that will be included covers the following:

- ✓ Custom pipeline stages for up to 2 Opportunity processes (*pipelines*)
- ✓ Creation of one custom Lead process, if required
- ✓ Creation of one Quote Management process (*Unlimited only*)
- ✓ Creation of Sales Activities checklist items for each Opportunity pipeline, Lead Process and Quote Process (*Enterprise/Unlimited Tier only*)
- ✓ Update Sales Units and User Roles
- ✓ Add custom User Roles (*Enterprise/Unlimited Tier only*)
- ✓ Add initial users prior to data import/training
- ✓ Fields & Forms: update form layout and add custom fields for Accounts, Contacts, Leads, Opportunities, Tasks and Appointments, Products and Product Line Items
- ✓ Create up to 2 separate Forms for each of Accounts, Contacts or Leads (*if there is a need to use Record Types*)
- ✓ Enable multiple currencies and exchange rates
- ✓ Define and create custom relationships for buying center and hierarchies and relation graphs
- ✓ Configure and import Product Categories, Products and Price Lists
- ✓ Review and update System Settings

Automatizer Processes/Workflows

Up to 3 simple Automatizer processes can be identified and set up as part of the *Core Implementation*.

Note that it's quite common for customers not to have such processes already specified during this initial stage, in which case customers would purchase the more in-depth Automation Package post Go Live.

Post Go Live

Pipeliner Follow Up Review to review and advise on the evolution of the original set up (Go Live + 3 months).

Documentation:

Implementation pack including requirements gathering templates sent out on project initiation.

Pipeliner's Commitment to You

Our implementation team will work with you and guide you through all of these steps, giving you our best advice and experience to help you get the most out of Pipeliner for your business.

Your responsibilities

In order for any project to be successful, we will rely on you to:

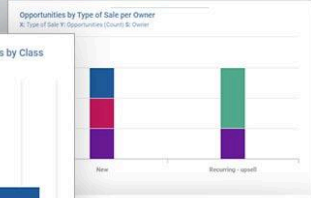
- Nominate the right colleagues to be included in your project team, ensuring that they have an appropriate level of knowledge to participate fully in the design process and that they are willing and able to provide written specifications in a timely manner
- **As part of the initial build, you'll need to be able to:**
 - Define your core processes for working with Opportunities (*and, if required Leads and Quotes*), specifying the process steps and sales activities
 - Provide the definitions for custom fields for Accounts, Contacts, Leads and Opportunities (*including Sales Action fields*) plus Quotes, Tasks/Appointments and Products/Product Line Items
 - Agree internally and then specify user security and rights as well as sales units and roles

- Define 3 simple “**Day 1**” Automatizer processes to be included and set up prior to Go Live (*if applicable*)

What’s Not Included in the *Core Implementation*

The following are not included in the *Core Implementation* though, of course, we’d be happy to help you with these elements on an ongoing basis if you want to re-engage with our paid-for Professional Services. Having said that, with appropriate Admin Training, your own Admins can take responsibility for these elements:

- ✗ Data Import (*though some advice on data preparation will be offered*)
- ✗ Training (*a separate training package will be offered*)
- ✗ Automatizer Processes (*outside of the initial 3 processes*)
- ✗ Approval Processes
- ✗ Working with Custom Entities
- ✗ Reports and Dashboards
- ✗ Forecasts & Targets
- ✗ Email Templates
- ✗ Document Templates
- ✗ Email Sequences
- ✗ Appointment Scheduler pages
- ✗ Calling & Messaging



Pipeliner CRM

Exceptional Engagement

The Better CRM > Built for Sales, Used by Sales!



The Pipeliner Universe – Sales Enablement, Knowledge, Networking

Pipeliner CRM
pipelinersales.com

Sales POP!
salespop.net

Go Ahead!
go-ahead.global