1CRM QuickStart Service

Implement 1CRM in 30 days or less!

Our **QuickStart Service** provides companies that are new to 1CRM a way to reap the benefits of a well-organized business on the cloud in about 30 days.

- The QuickStart is a flat-rate implementation for companies with 50 users or less.

- We target project completion within 30 days of kick-off.

- Our process involves 4 phases: *Business Process Review, Design, Implementation and Training.*

QuickStart Benefits

- Immediately benefit from proven 1CRM best practices for CRM implementation

- Avoid botched implementations that waste your employees' time and your company's money

- Approach CRM as a business strategy

- Learn how to properly make basic administrative changes

- Get the knowledge transfer needed to further optimize your solution yourself

Phase 1: Business Process Review

1CRM Systems Corp. will meet online with your designated project owner to review your business' processes and goals. We will then prepare and mutually agree on a list of requirements and priorities for the project.

Phase 2: Design

1CRM will document a recommended action plan for your 1CRM instance. This includes page layouts, required fields, custom fields, pick-list values, and user access profiles.
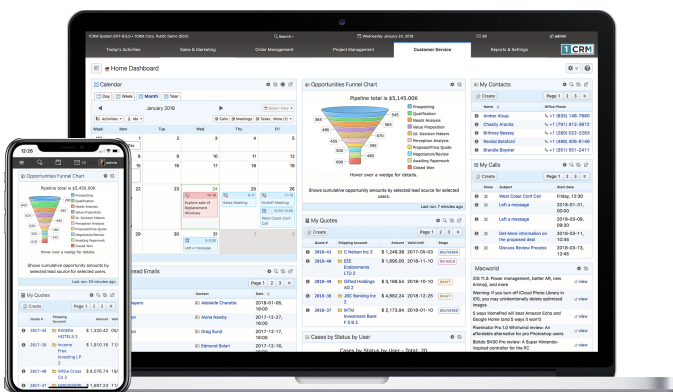
Phase 3: Implementation

Once the action plan is approved, 1CRM will implement your plan. We will schedule two to three review sessions with your designated project owner to ensure that we are meeting the expectations set forth by the action plan.
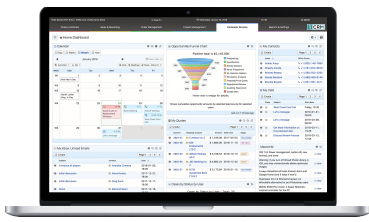
It is critical that the appropriate stakeholders are available and involved in this phase so that their input is considered and incorporated in the implementation.

We will test the application from different end-user perspectives to ensure the quality of the work done.

Phase 4: Training

We will provide two training sessions: one for business users and one for your 1CRM administrator.

Application Deliverables

- Implementation of the sales and marketing system in 1CRM including configuration of campaigns, leads, opportunities, and pipeline charts.
- Configuration of custom Home Dashboard and up to 10 dashlets, plus dashboard sharing rules.
- Initial import of existing Accounts, Contacts & Leads.
- Configuration of CRMSync™ for one Android or iOS phone or tablet, as training.
- Configuration of one 1CRM Web-to-Lead form for your website.

Administrative Settings Deliverables

- Creation of users and profiles; Configuration of role hierarchy & sharing settings; Email settings.
- Configuration of system information: Company Information, System Settings, Email Settings.
- Configuration of system Scheduler, and system Backups.
- Customization of screen layouts, custom fields, Smart List Tabs and Dashboards (up to 8 hours).

Training Deliverables

- One end user focused training session delivered online (max. 5 attendees).
- One administrator focused training session delivered online.

Out of Scope

- Data migration (other than Accounts, Contacts & Leads) or de-duplication.
- Creation of Email Marketing Templates.
- Product Catalog configuration and data import.
- Custom software development.

Cost and Timeline

The package includes **50 hours** of consulting and costs **US $6,500**.

The implementation must be completed within 30 days of the project kick off meeting. Therefore, you must provide 1CRM Systems Corp. with ready access to key business stakeholders and adhere to the agreed upon project timeline. Additionally, all 1CRM licenses must be purchased prior to kick off.