

AGENCY QUICKSTART: CRM

We realize your world is always changing and fast paced, that's why we've created the Agency Quickstart to provide foundational client management functionality that can be expanded at your pace.

IMPLEMENTATION PACKAGE

- Core CRM functionality
- User enablement

TIMELINE: 1-2 weeks



Solution

What is it?

Our Agency Quickstart provides a basic CRM, built on the Salesforce platform, which allows agencies to achieve business value through core CRM features like contact and pipeline management.

What is the Value to an Agency?

For agencies that use email and Excel to manage pipeline and relationships, the Agency Quickstart provides basic functionality for pipeline management, reporting, and relationship tracking (contacts/accounts).

What's Included?

Pipeline Management module, Account and Contact Management module, Basic Reporting, Chatter (collaboration), basic additional customizations (declarative), enablement of users.

What's the Timeline?

Easily deployed in 1 week, additional customization available in week 2.



Vision

Build a Repeatable Agency Solution

Our solution can be easily installed for a large number of agencies in 1-2 week cycles allowing all agencies to utilize the same core functionality.

Enablement of Users

For each agency, users will be enabled by the end of the implementation to help achieve high adoption.

Customization

Additional customizations are available as separate projects upon request:

- Custom workflows
- Data migration
- Pipeline visibility into subsidiaries
- Forecasting

Current Work with Large Agency Clients

GLOBAL

Event Services Agency

Specializes in public speaking engagements

- Provided a comprehensive Salesforce strategy and implementation; achieved critical business goals and increased revenue.
- Robust Sales Cloud implementation, including a migration from Microsoft Dynamics with significant business process optimization.
- Established a Salesforce platform roadmap that the agency is following.

LARGE

Marketing Agency

Creates specialized marketing solutions from SEO to web dev

- Led a Salesforce Strategy and Roadmap assessment for a highly customized instance of Salesforce with complex business needs.
- Recommended and jointly developed a multi-phased approach to streamline the system; the first phase focused on migrating to Lightning.

WHY MAGNET360

Magnet360, the Mindtree Salesforce practice, has been a Salesforce partner since 2004. We help forward-thinking companies engage their most important audiences to drive the growth, retention, and efficiencies that ensure meaningful business outcomes. By leveraging the Salesforce Platform and an iterative delivery model we help businesses work smarter and deliver value to their organizations quickly. Our innovative cross-cloud solutions have been delivered to customers in a variety of industries.