

CRM Consulting & Implementation Services

## Qbis QuickStart Service

### Implement Qbis in 30 days or less!

Our **QuickStart Service** provides companies that are new to Qbis a way to reap the benefits of a well-organised 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 Qbis 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 optimise your solution yourself



#### Phase 1: Business Process Review

QBIS Software 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

QBIS Software will document a recommended action plan for your QBIS instance. This includes page layouts, required fields, custom fields, pick-list values, and user access profiles.

#### Phase 3: Implementation

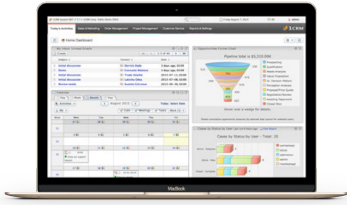
Once the action plan is approved, QBIS will implement your plan. We will schedule two to three review sessions with your designated project owner to ensure that we are meeting the expectations set forth by the action plan.

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 Qbis administrator.



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### Application Deliverables

- Implementation of the sales and marketing system in Qbis 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 Android or iOS phone or tablet, as training.
- Configuration of one Qbis 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.
- Customisation of screen layouts, custom fields, Smart List Tabs and Dashboards (up to 10 hours).

### Training Deliverables

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

### Out of Scope

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

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### Cost and Timeline

The package includes **50 hours** of implementation / training hours and will cost **R20, 000**

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