**Page 1 of Letter of Understanding Goes Here**

**Action Plan**

**To Help You Determine if You are a “Go” with Adventace SMS®**

| **Objective** | **Date** | **Action Item** | **Completed** |
| --- | --- | --- | --- |
| Discovery | TBD | Conduct discovery meetings with:   * VP Sales * VP Sales Operations * VP Marketing |  |
| TBD | Summarize findings to Executive Team |  |
| Vision  Proof  Assessment | TBD | Prove Adventace SMS™ capabilities to Executive Team:   * Contact client * Demonstrate programs |  |
| TBD | Meet with your Salesforce.com Administrator, demonstrate Adventace SMS™, identify potential items of concern |  |
| TBD | Discuss *Implementation Plan to Substantiate Adventace SMS™* (next page) |  |
| TBD | Provide *Supplement Sheet* (terms & conditionss, fees, invoicing, etc.) |  |
| Approval | TBD | Gain approval of *Supplement Sheet* |  |
| Implementation | TBD | Execute *Implementation Plan* |  |
| TBD | Move into production and track progress |  |

**Implementation Plan to Substantiate Adventace SMS™**

|  |  |  |  |
| --- | --- | --- | --- |
| **Steps** | **Activities** | **Benefit** | **Fees @ $1,800/day** |
| Team introduction, initial assessment & potential issue identification | Introduce our implementation Team and responsibilities.  Provide you with context related to SFDC features and architecture used by you, and how they may impact an SMS implementation. | Confidence that SMS will be implemented effectively and quickly.  Help you understand whether there are any issues upfront. | “Presales” activity. No fee. |
| Project Management | * Formal status [initially at least 1X/week] * Ongoing (situational) * Create / manage Open Items List (OIL) |  | Estimated at 1 day per week with 3-week rollout.  $5,400 |
| Pre-launch Review[[1]](#footnote-1) | High-level review of the Client’s existing org. This is a repeatable, structured review to identify all of the likely drivers of complexity and client specific implementation needs that need to be addressed. Items reviewed but not limited to:   * Opportunity Record types * Number & variety of profiles * Custom fields & field security * Number and variety of Opportunity page layouts * Workflows related to Opportunity * Triggers related to Opportunity * Implementation of opportunity “children”, Products, Quotes, Forecasts, Proposals, etc.) | Pre-Rollout Instance Overview of Readiness (PRIOR): A high level summary of the complexity of the org specifically as related to rolling out SMS. This document will identify specific questions and areas of concern for “deeper dive” to understand existing processes and requirements that may impact/be impacted by rolling out the SMS Process. | Fixed fee @2 days, $3,600 |
| Set Up Adventace SMS™1 | Installation of Adventace SMS from the AppExchange App   * Load the app exchange app to Sandbox * Minor standard configuration steps to:   + Setup Field dependency   + Allow profiles access to New Record type   + Create Selling Process * Load Sample Dataset | A working Adventace SMS™ Application in a sandbox with a sample account, opportunities and reference data to drive SMS. Operational data includes permanent tools (Skill Development Methodology) and sample dataset (Roles, Issues, Causes, Capability, Action Plan, etc.) that will be reconfigured as part of implementation to match the your processes). | Fixed fee @1 day, $1,800 |
| Training | * Administrative (to manage critical backend information) * Sales/Sales Manager/Executive * Salesforce 101 |  | * 2 hours. $450/session * 2 hours. $450/session * ?? |
| Deep Dive[[2]](#footnote-2) | Meeting with the Client Leadership to review the “PRIOR” document and make decisions about the scope of the initial SMS implementation, including:   * Groups of users to enable * Existing processes to continue to support * Existing processes and data points that will be obsolete * Number of different page layouts needed * Data conversion of existing opportunities * “Quick Hits” related to any ongoing CRM pain points that can be tackled in the context of an SMS implementation (changes that will facilitate the team being able to focus on the new selling methodology) | Project Scoping Document and Estimate of work for DCS to make changes to the system, comingling current and SMS tools. |  |
| Configuration / Development effort | Configuration project based on the Scoping/Estimate document. Updating of screens, profiles, page layouts, Triggers, workflows, etc to build the “to-Be” system. |  |  |
| Final SMS Configuration | After finalizing the final SMS business rules to be added to the system, they must be loaded. This process can happen either manually, or by the client team providing formatted xls files to DCS to load in bulk. |  |  |
| Post “Go Live” QA Meetings | Start weekly or as needed  Move to quarterly or as needed |  | 1 hour. $225/meeting |
| Support and Maintenance | * Follow up to items identified in Post “Go Live” Meetings * Minor configuration changes as business processes evolve. * Declarative Updates to the SMS components as needed * Additional triggers, workflows, validation rules * Advanced Reporting Requests * etc |  | T & M |

1. Setup and Pre-launch Review can happen either in parallel or independently of each other. [↑](#footnote-ref-1)
2. This process should happen **after** the Client team has had initial training on the SMS methodology, and should include an overview of existing processes shared with the Adventace team to identify any current processes that may be in conflict with the culture change required by SMS. [↑](#footnote-ref-2)