

Business Analysis

Sometimes it helps to have an outside person come and meet with your team to collect requirements for a new or existing system. Roycroft Technology partners can assign an analyst to work with key stakeholder to understand what the future state of the system needs to be to achieve success. We will define and document these requirements, so that your development team members can turn these requirements into reality.

Types of Business Analysis Deliverables

- Business Analysis Plan
- Business Case
- Business Requirement Specification
- Functional Specification
- Non-Functional Specification



Schedule your first meeting with us today to help us understand your needs. From there we can engage to develop a plan to work with your team to uncover the requirements and get them defined and documented.



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CRM Strategy

We know that an investment in a CRM is expensive and that your CRM is critical to your business. At Roycroft Technology Partners we want to help you optimize your system to ensure success. Whether you are new to Salesforce and need help configuring your new CRM, or you have an existing CRM that needs support and administration, Roycroft Technology Partners can help. Contact us to discuss any one of our service offerings:

Data Migration

Need to do a one-time migration of data or need to establish an ongoing process for data into or out of Salesforce.

Quick Start

Have a new Sales Cloud org and need it configured? Go live in early as 4 weeks with our Quick Start Package. It includes Project Kickoff and Business Process Review, Lead Personalization, Account configuration, Contact Customization, Opportunity Configuration and Salesforce training. Once the engagement is over, take advantage of our Ongoing Administration package.

Health Check

Need a health check on your existing system? We are happy to help. We will look at duplicate accounts, contacts and opportunities, objects to be retired to optimize your data storage and make recommendations on the actions you should take.

Ongoing Administration

Have an existing org and need someone to provide you and your users support. We will manage users and security, add new fields, flows and objects as required, answer you users questions and train them on new functionality we implement. Monitoring key data fields for accuracy.



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Project Management

Whether you need to gain control of an existing project or want to implement a new one, Roycroft Technology Partners can help. We can help you from initiation to project close and any phase in between.

Types of project management deliverables

- Project kick-off meetings
- Project charter
- Project charter approvals
- Project work plan
- Risk and issues log
- Communication plan
- Training plan
- Status reports
- Meeting notes/action items
- Project change requests
- Go-live sign off
- Lessons learned



Schedule your first meeting with us today to help us understand your needs and your current project state. From there we can engage to develop a plan to work with your team to get your project under management.



Process Definition

We understand that getting to revenue quicker as cost effective as possible is essential for business. Whether you have a new system or need a new way of doing things, we are happy to work with your team to develop, document, train, and implement new processes. We can also audit existing processes and recommend changes to optimize.

Types of processes implemented and documented in the past

- Customer journey
- Go-to- Market
- Sales process
- System support processes by incident
- Partner management
- Change management



Schedule your first meeting with us today to help us understand your needs and your current processes. From there we can engage to develop a plan to work with your team to get the most efficient process developed, documented and in place.





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Report Creation

Many of our customers come to us with the need for reporting from disparate systems. This is where we can help! We help you get your data under management, identify missing metrics to build into your systems and build reports that can be delivered right to your inbox or with a click of a button. We understand that the accuracy of these reports is essential. So we also build in processes for managing and monitoring these data fields to reduce entry error and catch anything that may slip through.

- Board reports
- Executive dashboards
- Product performance
- Forecasting
- Sales Operations Reports
- Support Reports
- System monitoring
- Transactional billing
- Ad-hoc requests



Schedule your first meeting with us today to help us understand your needs and where your data resides. From there we can engage to develop a plan to get your data under management and make your reporting more accurate and efficient!



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