



**Roycroft**  
TECHNOLOGY PARTNERS

# 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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