

Activate for Sales Cloud

Our Sales Cloud Foundation Package is aimed at getting you set up quickly to work smarter, connect better with customers, sell more, and grow your business faster all within one customized platform. Through a consultative approach, we strive to setup your Sales Cloud instance to reflect how your company does business, then empower you to leverage its capabilities by means of our training and consultancy services. We understand every team's unique requirements separately and collectively, making sure Sales Cloud is where your teams collaborate to grow your business together.



Do these challenges look familiar?

- Sales Pipeline Visibility
- Multi-territory Team Management
- Opportunity Pipeline Management
- Sales and Marketing Team Coordination
- Qualified Sales and Marketing leads
- 360° Customer View
- Customer, Prospect, and third-party Data Integration

87%
of our **customers**
faced **two or more**
challenges
You are not alone.

The reason for partnering with us?

At Bubblebox, we believe a Sales Cloud implementation should create value across all areas of business. We aim to provide all team members from sales, marketing, customer services through to merchandising with a platform that stores critical information about your day to day activities, enabling an efficient and cohesive environment for all. Ultimately elevating your sales, customer service and marketing efforts.

Our **Foundation Package** includes:

- General set up including Custom Domain and Branded Login page
- User Roles and Profile Configuration
- Guidance on Salesforce1 App
- Territories Configuration
- Multiple Currency Configuration
- Basic security and access Configuration
- Configuration of Salesforce for Outlook
- Standard Object Configuration including custom fields and default page layout customization for
 - Lead Object
 - Account Object
 - Contact Object
 - Opportunity Object
- Standard Reports and Dashboards

“Without the integration between SFMC and Salesforce, we wouldn't have been able to engage our retail and wholesale customers with more relevant communications. We see evidence of the payoff from working with Bubblebox every day – they laid the foundation for our team to achieve its email marketing goals.”

Ryan Moore
Director, Direct-to-Consumer Sales
Ridge Vineyards

Ready for more?

Once you have the foundation in place, you can add new features as you grow, so that your information system and processes are always the right size for your business.

Our **advanced** packages include but are not limited to:



Extend your organization's data by defining **Custom Objects**, storing information unique to your organization.



Automate your organization's repetitive business **processes** using Approvals, Process Builder, Workflow, and Visual Workflow.



Include your **product** inventory or services you sell to customers enabling the ability to generate Quotes.



Every support request is an opportunity to enhance your relationship with your customers or generate additional revenue. **Case management** enables you to make the most of each interaction.

If you require a custom package from the onset, we can design a custom engagement that meets your specific needs.