CUSTOM SERVICE PACKAGE

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PREPARED FOR

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YOUR SELECTED SERVICES
5 services included

1 Technical Debt Cleanup

Clean up years of organic growth and technical debt. We audit your Salesforce instance, identify unused fields/objects/workflows, document dependencies, and systematically remove or consolidate redundant automation. Includes data migration for consolidated fields and validation rule cleanup.

' **KEY DELIVERABLES**

- ' Technical debt audit report
- ' Cleanup execution plan
- ' Dependency mapping
- ' Post-cleanup validation

2 Process Automation

Automate repetitive tasks that waste your team's time. We design and build Flows, approval processes, and workflow rules that handle everything from lead assignment to contract approvals. Includes process mapping, automation design, testing, and user training.

' **KEY DELIVERABLES**

- ' Process automation flows
- ' Approval process configuration
- ' Automation documentation
- ' User training materials

3 Sales Team Training

Drive user adoption with comprehensive training programs. We create role-based training materials, conduct hands-on workshops, and provide ongoing support during the transition period. Includes admin training, end-user training, and change management strategies to ensure your team actually uses the new system.

' KEY DELIVERABLES

' Training materials
' Hands-on workshops
' Quick reference guides
' Admin certification

4 Migration & Data Import

Migrate data from legacy systems or consolidate multiple Salesforce orgs. We handle data extraction, transformation, deduplication, validation, and import with zero data loss. Includes data quality checks, rollback planning, and post-migration validation to ensure accuracy.

' KEY DELIVERABLES

' Migration strategy
' Data transformation scripts
' Quality validation
' Rollback plan

5 Security & Compliance

Secure your Salesforce instance with proper role hierarchies, profiles, permission sets, and field-level security. We audit existing permissions, design a security model aligned with your org structure, and implement compliance controls for SOC 2, GDPR, or industry regulations. Includes audit trail setup and security testing.

' KEY DELIVERABLES

' Security model design
' Role hierarchy configuration
' Compliance documentation
' Security audit report

REVELATE

SALESFORCE EXPERTISE FOR SERIES B SAAS

&¡ EXCLUSIVE OFFER

10%

Schedule your consultation within 10 days and receive

10% OFF your first contract

#ð Offer expires: Nov 7, 2025

NEXT STEPS TO GET STARTED

1. Review your selected services and deliverables

2. Book a free 30-minute consultation (take advantage of the 10% discount!)

3. Receive a detailed project timeline and pricing proposal

4. Begin your Salesforce transformation journey