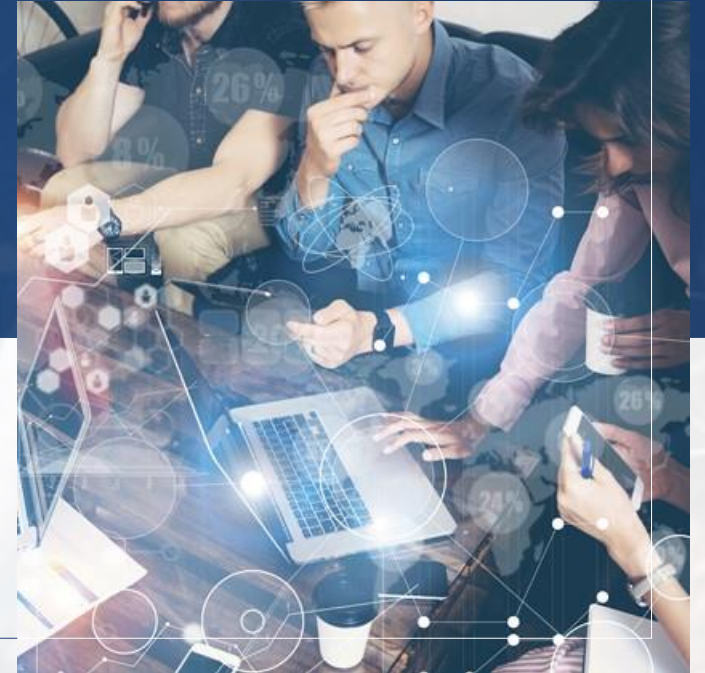


# VELOSIO SALES EXPRESS

March 2021



**Velosio**<sup>®</sup>

# Velosio Sales Express

- Sales Express offers a rapid low cost delivery of Dynamics 365 for Sales. It's ideal for small user counts or companies looking for a rapid low cost start within a division or team within a larger organization
- The solution combines limited consulting and hands on, with training and support to get your Dynamics 365 Sales solution up and running quickly
- There are three offers that have been designed to fit companies with as few as 5 users to 50+ users.

# CE Express Packaged Offerings

CE Express  
BC <-> CE Connector

## Essentials

- Configuration
- Data Migration Training
- End-User Training
- Go-Live Support

Good  
\$5,995

## Premium

- **Everything in the Essentials Package, plus**
- Business Process Workshop
- Automation setup
- Outlook Integration
- Administrator Training
- More Configuration, Migration Training and Go-Live Support

Better  
\$14,995

## Premium Plus

- **Everything in the Premium Package, plus**
- Mobile App Setup
- Even More Configuration, Automation Setup and Go-Live Support

Best  
\$29,995

# Package Offering Comparison

Choose the offering that best meets your needs

Implementation and training structured to quickly automate management of your sales pipeline with expert services to: **Plan | Build | Deploy** your Dynamics 365 for Sales solution.

	Essentials	Premium	Premium Plus
<b>Package Overall</b>			
Fixed Price Services Fee	\$5,995	\$14,995	\$29,995
Up and running in	2 Weeks	6 Weeks	8 Weeks
<b>Plan   Design</b>			
Business Process Review (2 hours)	✓	...	...
Business Process Workshop (8 hours)	...	✓	✓
Project Kick-off call	...	✓	✓
Project Checkpoint Calls	...	4	8
<b>Build</b>			
Customizations / Configuration of			
Security Roles	1	4	4
Fields	up to 20	up to 40	up to 80
Forms	1	4	4
Views	2	8	8
Dashboards	1	2	6
Business Process Flows	...	2	4
Workflows	...	4	6
Conference Room Pilot Sessions	1	2	2
Data Migration Training	1 hour	4 hours	4 hours
<b>Deploy   Support</b>			
User Training Session	up to 2 hours	up to 4 hours	up to 4 hours
Go Live Support	up to 2 hours	up to 16 hours	up to 30 hours
Administrator Training	...	up to 8 hours	up to 8 hours
<b>Plus</b>			
Outlook Integration setup	...	✓	✓
Mobile Setup (up to 25 users)	...	...	✓

# Package Offerings

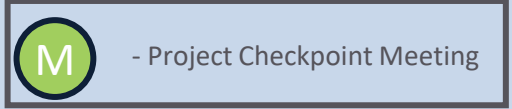
## Premium Implementation Scope

	Plan/Design	Build	Deploy/Support
Velosio Role	<ul style="list-style-type: none"> <li>Project Kick-off</li> <li>Requirement definition</li> <li>Application set-up</li> <li>Project plan w/4 checkpoints</li> </ul>	<ul style="list-style-type: none"> <li>Light Application Configuration (leads, accounts, contacts, opportunities, activities)</li> <li>4 Workflows</li> <li>2 Conference Room Pilot Sessions</li> <li>Admin training</li> <li>Data migration session</li> </ul>	<ul style="list-style-type: none"> <li>User setup</li> <li>Outlook Integration</li> <li>Train users</li> <li>Production setup</li> <li>Dashboards</li> <li>Go-live &amp; post implementation support</li> </ul>
Client Role	<ul style="list-style-type: none"> <li>Documented sales process</li> <li>Single BU</li> <li>OOB roles + 2 custom</li> </ul>	<ul style="list-style-type: none"> <li>Minor field remove/add approval</li> <li>Attend training classes</li> <li>Review system build, identify changes</li> <li>Complete data load template, extract and cleanse data</li> <li>Facilitate pilot and pilot feedback</li> </ul>	<ul style="list-style-type: none"> <li>Train users</li> <li>Assume administrative support role</li> <li>Join CRMUG, etc.</li> </ul>

Out of scope: Third party applications, system integrations, customization, java scripts. Project limited to 100 hours consulting and project management following defined project plan. Client must meet deadlines and agreed upon schedule.

# Premium Implementation Process

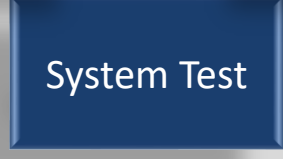
weeks



## VELOSIO RESPONSIBILITIES



Project Kick-Off



## CLIENT RESPONSIBILITIES