



IMPROVED PRIVATE EQUITY OPERATIONS IN A WEEK!

- **EXPERIENCED CRM EXPERTS** – with a proven track record of success in Private Equity and Venture Capital
- **COMMITTED RESOURCES** - dedicated to providing the knowledge and care your project deserves
- **PROVEN QUALITY** – our results speak for themselves. Take a look at the selected list of *SalesLogistix* clients to the right.
- **OBJECTIVE RESOURCES** - we are an independent 3rd party serving *your* best interests.

SalesLogistix

650-326-2626

MANAGING RELATIONSHIPS with clients and prospects is crucial for any financial services firm in gaining a competitive edge. As investment clients and targets have become increasingly savvy, firms need a customer relationship system that facilitates the customer service that investors have come to expect.

That's why so many Private Equity and Venture Capital firms have turned to salesforce.com® to manage their customer-facing business processes.

Based on dozens of implementations at investment firms across the US, SalesLogistix has created the **Salesforce for Private Equity** JumpStart package, customizing the Salesforce.com platform to:



- ✓ Speed user adoption
- ✓ Streamline simplify data entry
- ✓ Track deals, referrers, syndicate members, funding sources, and executives
- ✓ Generate weekly “deal sheets,” deal-flow dashboards, and quarterly analytics

Designed for firms with fewer than 25 users, JumpStarts address the specific requirements of your firm. Our certified consultants will work with you to develop and tailor solutions that address your problems and accelerate your success. We're sure that with our implementation packages, one is just right for you and your business.

GOLD DEPLOYMENT

This 40-hour package provides you with a robust start to your salesforce.com deployment. The engagement includes a BPR session the first day, where we determine exactly how you will deploy the salesforce.com system. Following the BPR session, our salesforce.com certified consultants will ensure that the software is configured to your needs and will assist you in driving your project to meet your defined business objectives. We will configure:

- Contact and Account Management
- Tasks / Action Items (Activity Management)
- Deal Pipeline (Opportunity Management)
- *Investment* and *Fund* Custom Objects
- 8 Reports and a custom Dashboard
- An HTML Template (for Mass Email campaigns)
- A 2-hour Training Session with your user base – conducted via GoToMeeting

We will also work with your administrators so that we can assure that when we leave, they are trained and understand the configuration as well. Our cost for this package is \$9995*

PLATINUM DEPLOYMENT

This 48 hour package provides much more value to our customers who are looking to get more operational advantages from salesforce.com. Our Platinum package provides all of the features of our Gold package, plus:

- 2 Custom Objects from the Private Equity configuration
- 2 User-Specific Page Layouts
- 3 Workflow Rules or 3 extra reports / dashboard components
- 2 HTML Mail Templates
- Advanced training for Outlook integration and System Administrators
- Data Migration of Accounts and Contacts from a single source (up to 1000 records)

Our cost for this package is \$11,995*

We're with you all the way. Many clients need additional features, data migration, system integration, mobile access, and ongoing administration assistance. These capabilities and more are available as optional extensions to our Gold and Platinum packages. SalesLogistix can help you quickly and affordably discover all the benefits of your salesforce.com system.

*Plus travel and expenses. See www.saleslogistix.com/PE.pdf for details.

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