SALESFORCE FOR VENTURE CAPITAL BLACKJACK IMPLEMENTATION

Professional Services for Excellence in Venture Capital

Success On Demand.

Salesforce.com is the world's most popular on-demand CRM solution, and it's also very stable and reliable. But SFDC is also a very flexible ***platform*** for building customized financial services applications. SalesLogistix has been working closely with Salesforce.com to help clients like the New York Stock Exchange, a range of VCs (ranging from seed round to mezzanine), private equity firms, real estate funds, PIPE funds, and LBO funds.

Based on this experience, SalesLogistix has created the Salesforce for Venture Capital BlackJack implementation package, customizing the Salesforce.com platform to:

- ✓ Speed user adoption
- ✓ Streamline pages and templates to simplify data entry
- ✓ Track proposed deals, referrers, syndicate participants, funding sources, and management teams
- ✓ Integrate with industry data sources and news feeds
- ✓ Generate weekly "deal sheets," deal-flow dashboards, and quarterly analytics for strategic reviews or LP meetings.

The BlackJack package gets you a customized, turnkey system that is ready for users – typically within two weeks of starting the engagement.

We work with your project manager to keep the project on schedule, on budget, and on track to *beat* your team's expectations.

Engagement Elements:

- **Requirements and business process review** – Conduct up to 5 thirty-minute interviews with key users of the system to understand your firm's deal flow, business process, and tracking needs.
- **Agile development & user reviews**
  - Customize Deal, Contact, LP, and Referrer screens*
    - ✓ Add / remove / modify fields, buttons, and pick lists
    - ✓ Use lookup relations
    - ✓ Create 4 different types of Company (e.g., Deal, VC, referrer, service provider)
    - ✓ Develop screen layouts for two classes of user
  - Develop Investments* and Funds* custom objects for your firm's critical tracking elements.
  - Conduct a pilot usage session, putting actual deals through the deal life cycle in the system.
  - Conduct two iterations of customization and user reviews.
- **Reports and dashboards*** – Create the Weekly Deal Sheet, Personal Deal Sheet, Deals by Geography, Deals by Sector, Deals by Status, Deals by Funding or Revenue stage, Deals by Referrer, Deals by VC, Deals by Fund, and Personal Call List. Configure two dashboards.

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*To see the specifics of these features, go to www.saleslogistix.com/products/VC/

- **Deployment to your team** – Activate all user accounts. Develop customized "cheat sheet" and train all users on site or via web conference (one 30-minute session is all that's needed). Do one hour hands-on training of your designated system administrator.

What's involved: Once you've purchased your Salesforce.com Enterprise Edition licenses and signed the Sales*Logistix* BlackJack contract, we start working with your team. The first day requires some on-site meetings, but most subsequent work is done in our offices and is totally non-intrusive to your operation.

Costs: Sales*Logistix* delivers each Salesforce for Venture Capital system to fit your firm's needs. Even so, our experience implementing Salesforce for Private Equity and Venture Capital customers means we can deliver your system for as little as $9995 plus travel and expenses.

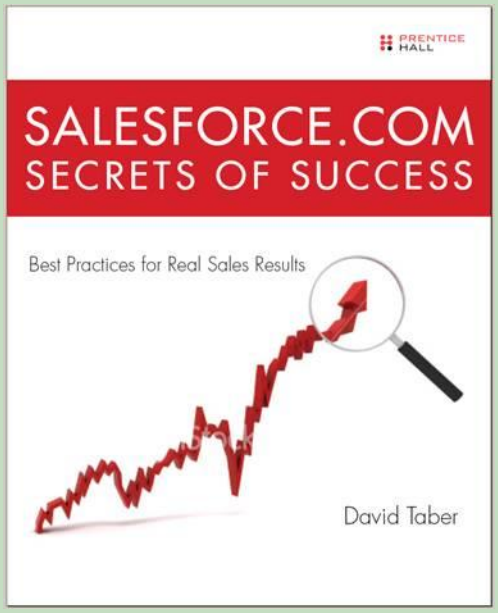
Some customers may need additional elements, such as:

- **Custom objects, workflows, rollup fields, formulas, or VF / APEX code** – quote
- **Additional reports, dashboards, or excel spreadsheet macros** – quote
- **Data Migration** – Collecting, converting, and importing data records into your DealTracker system, including the transformation of existing SFDC data to yield historical dates and sequences. *Typically $1 to $5 per record imported.*
- **Integration with external systems (including contact mgrs)** – quote
- **System Admin support** – $195 per incident
- **Additional user training sessions** – conducted on site or via the web, $500 per session.

About Sales*Logistix*

Sales*Logistix* is a California consultancy dedicated to implementing Salesforce systems **tailored to the business processes of our clients.** Because we closely align system design to the way firms actually work, our clients experience the rapid user adoption that's critical to system success and credibility.

Sales*Logistix'* founder, David Taber, is the author of the Prentice Hall's 2009 book on SFDC best practices.



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