Salesforce Quick Start Solutions

Fast-track your Salesforce journey with 5-6 week end-to-end implementations delivered in weeks — secure, simple, and scalable.

⚡ What Is a Quick Start — and Why Use One?

A Salesforce Quick Start is a fixed-scope, rapid deployment engagement designed to help you realize business value from Salesforce — fast.

Benefits of Quick Starts:

✅ Implementation in as little as 2–6 weeks

✅ Out-of-the-box configuration of standard Salesforce features

✅ No code, no complexity — just smart setup and expert guidance

✅ Ideal for teams starting fresh or migrating from spreadsheets/manual tools

✅ Lower upfront cost and risk compared to full-scale transformations

WHY CFS?

Business Values

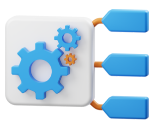
Providing our clients with the personal touch of a boutique Salesforce Partner and the same depth of knowledge as any of the larger players.

Approach

Customer & relationship forward. Strong connections & innovative mindset allows consistent growth within the Salesforce ecosystem.

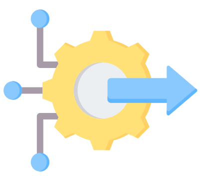
Included in Every Quick Start:

Discovery & Planning: Understand business goals & custom use cases



Configuration Summary: Documentation of all setup and changes made during the Quick Start

Admin Enablement: Basic handoff session for managing users, reports, and day-to-day tasks



Next Steps Guide: High-level recommendations for future enhancements or integrations, tailored to your business goals

Find your Quick Start Package

Sales Cloud Quick Start

Ideal for: Sales pipeline visibility, lead conversion, account & opportunity tracking

Quick Start Inclusions:

1. Lead, Account, Contact, Opportunity setup
2. Record types and page layouts configuration
3. Reports & Dashboards Configuration
4. Email integration

Service Cloud Quick Start

Ideal for: Customer service teams, support desks, internal case management

Quick Start Inclusions:

1. Account Configuration
2. Service Cloud Console Setup
3. Case configuration with list views, queues, page layouts, and custom fields
4. Email-to-Case and Web-to-Case setup
5. Reports & Dashboards Configuration

Sales Cloud Quick Start
Creamy Creation

- ✅ Implemented a new Sales Cloud org post-divestiture
- ✅ Separate record types for Prospects and Commercial Customers
- ✅ Page layout & custom field configuration
- ✅ Opportunity object with multi-stage tracking and reporting
- ✅ Migration of existing Accounts, Contacts, and Visit Reports

Let's Connect

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