

READY, SET SALESFORCE

Get underway fast with Port & Starboard.

Need help navigating CRM? We know the ropes.

Salesforce is a powerful tool we can tailor to your business at lightning speed. Here's what a Get Underway project looks like with us.



01 REQUIREMENTS

We'll spend some time learning about your business. Our goal? Defining what Leads, Accounts, Contacts, and Opportunities mean for you.

We'll walk step-by-step through your sales process to determine how we'll configure Salesforce to fit seamlessly into your day-to-day activities.

You'll tell us what's important to you, and we'll figure out how you can track and report on those things without skipping a beat.

02 CONFIGURATION

After our initial meeting, Port & Starboard will translate what we learned about your business into Salesforce functionality.

We'll stow away any tabs and fields you won't be using and add in all the details that will make this particular Salesforce org exclusively yours.

Once we're done, we'll set you up with Lightning for Outlook or Lightning for Gmail, and we'll even help you import up to 5,000 of your existing leads, accounts, contacts and open opportunities!



03 TRAINING & FOLLOW-UP



Once your Salesforce org is in ship-shape, we'll demonstrate what we built and how to use it.



We'll check in twice over the next two weeks to see how you're doing and answer any questions you have.



After you've had two weeks to enter data, we'll create four custom views, three reports, and a dashboard for your use.

INVESTMENT

Our three-step Get Underway quick start project for 1-5 Lightning Professional or Enterprise users costs \$5,000. (Got more users? Let's chat.)

We offer additional Salesforce consulting and customization services at an hourly rate or as part of a monthly support contract. Want a quote? Let us know, and we'll send you one.

WHO IS PORT & STARBOARD?



We are a small, talented crew of Salesforce experts, passionate about business, technology and any place the two intersect. We set sail on our consulting journey in 2015, in the wake of completing a multi-million dollar Salesforce & SteelBrick CPQ implementation project for our former employer.

Our claims to fame are our iterative approach, quick turnaround, and elegantly simple solutions to seemingly complex business processes.

In addition to Salesforce, we do work in multiple AppExchange packages, as well as many other systems, like Wordpress, WooCommerce, G-Suite, Xero, Quickbooks Online, Amazon Web Services, OneLogin, Zapier, Jitterbit, and more.

We chose our nautical namesake and theme because one of us was in the Navy, and the other just really likes anchors.

We're addicted to coffee, coworking, collaboration, and learning about our clients' businesses. We're innovators, problem solvers, and all-around good people.

Our clients are startups, government contractors, non-profits, small-to-mid-sized companies, and non-tech savvy entrepreneurs trying to get a handle on their systems.

