

ProspectSoft Easy CRM Scoping Template

The ProspectSoft CRM Solution for Businesses requiring Full Sales & Marketing functionality for up to 10 Users

Almost every business could benefit from CRM, and most know they should but just don't know how best to get started. CRM is now a lot easier to deploy and less expensive to setup than you might imagine.

Step1: is *Easy CRM* right for you?

Easy CRM isn't a cut-down software product; it's a cut-down project. The software included in the Easy CRM package is a fully functioning Sales and Marketing CRM Solution with integration modules (for any of the standard accounts packages) up to 10 user licences.

The thing that makes the Easy CRM system "easy" (and hence inexpensive) for is the minimising of "consulting" during the project. So once the client has defined their main drives and made a few other choices, these choices pre-define the project scope, workplan etc and hence significantly reduce the cost of the project.

Importantly, whilst a small degree of flexibility is possible, any significant variation from these main drivers will invalidate the "assumed scope" and require a full project to ensure customer satisfaction and avoid project creep and overruns.

Once the Easy CRM project is complete, any number of modules or users can be added as required at separate cost and as a separate project by upgrading to the full ProspectSoft CRM Professional version.

Step 2: Choose your System Configuration

Notes:

1. Each ProspectSoft Easy CRM system supports MAPI Email (such as Outlook) and multi-company accounts integration as standard.
2. The system manager is mandatory. It does not include any user licenses.
3. The maximum number of users permitted for the ProspectSoft Easy CRM is 10.
4. Each system must include at least one LAN license (i.e. cannot contain just mobile licenses).
5. Annual Licence Fees are mandatory on all ProspectSoft Easy CRM Software.
6. ProspectSoft Easy CRM Network and Mobile Client licenses come with the SQL database licenses built into the price.

System Configuration	Cost	Selection
Contact Manager B2B	Included	✓
Document Manager	Included	✓
Campaign Manager	Included	✓
Sales Ledger Integration	Included	✓
Sales History	Included	✓
Products & Pricing	Included	✓
Sales Lead Tracker	Included	✓
Quotation Engine	Included	✓
Sales Order Processing	Included	✓
Screen Customiser	Included	✓
XML API	Included	✓

Users Required	Cost	Quantity
LAN Users (1 required as minimum)	See page 5	
Mobile Users	See page 5	
	Total (Max 10 in total)	

Step 3: Integrate your back-office systems

Integration software for any of the standard accounts systems is included in the easy CRM project.

Integration	Cost	Selection
Access Dimensions Integration	Included	
IRIS Exchequer Integration	Included	
Pegasus Opera II Integration	Included	
Sage 50 Integration	Included	
ODBC Integration	Not Valid for Easy CRM	N/A

Easy CRM Projects

A typical easy CRM project takes just 49 hours to complete.

PROJECT MANAGEMENT

(Project co-ordination time is included in the standard implementation guide below).

ANALYSIS & SCOPING

To include:

- Confirm project objectives
- Define project responsibilities
- Define project scope for training, data conversion etc.
- Set timescale expectations
- Test network and install software

1 Day (for relatively straightforward project. Add additional days for more complex projects, i.e. with large number of users etc...)

SOLUTION DESIGN

To include:

- Define how the system will work
- Define who will use the system and how

1 Day

ITERATIVE CONFIGURATION & CUSTOMISATION

To Include:

- Prototype the system setup
- Trial data conversion
- Test each process that the system needs to support
- Iterate until the setup is agreed
- Define a training plan

Import rules:

1 data Source, i.e Accounts System Only – ½ day
(2 Data Sources, i.e Accounts + a Standard CRM Package (i.e. ACT!, Goldmine) – 2 Days
Additional Data Sources, cost per source – 1 Day
Each
Bespoke Database – 3 Days Minimum)

Configuration & Customization Rules:

2 Days To Include:

- Up to 4 reports
- Up to 2 user defined tabs with no more than 20 fields
- Set up and training (to create additional) for 1 word document template
- Set up and training (to create additional) for 1 email document template
- Set up of 1 quotation template

Non standard – 3 – 5 Days

TRAINING & GO LIVE

To Include:

- Design a training plan
- Final Data conversion and sign off
- Network User training
- Network Go Live support
- Comms testing for mobiles
- Mobile system setup
- Additional mobile user training
- Mobile Go Live and support

0-10 Users – **1 Day**

½ Day - Go Live

REVIEW AND HANDOVER

To include:

- Project Review
 - Tidy up and finalise
 - Hand over to support
 - Begin post-implementation reviews
- 1 Day**

Site Delivery

Easy CRM Solutions are standardised –in terms of the structure of the implementation project, ensuring maximum return for minimal investment. An Easy CRM implementation project follows the following structure:

1. Confirmation of the selections (as above) before beginning the system configuration.
2. Configuration of the basic data – customers and products integrated with your CRM system or back-office accounting system.
3. Creation of your CRM system, using this basic data (typically in a Virtual PC environment) and your chosen configuration.
4. Training for all users and a manager/administrator on:
 - a. How to use your system and how to update the admin content (Processes, dropdown lists, documents, etc.)
 - b. A go-live plan to take your “almost ready” CRM system through to live usage.
5. Once the training is complete, our work is mostly done (for now), but you will still need to spend a little time reviewing and finalising the system usage and data.
6. Following your go live, our support and account management teams will be on hand to help you get the most from your system.

Beyond Easy CRM

Easy CRM isn't right for everyone. Other ProspectSoft solutions provide further functionality, but also more flexibility in terms of both system configuration and what can be achieved within the scope of the project and the consultancy. However, a sensible compromise is often to start with Easy CRM and then, once the initial project is completed to review the site with one of our business specialists and to develop it step-by-step from its initial deployment. If you have further ambitions in mind it is often useful to state them at this stage in order that we can try (where possible) to set up your initial system with this future flexibility in mind.

1. Additional Network or Mobile clients can be added individually (subject to user count restrictions), priced according to the price list.
2. Additional or increased ALF's due to expanding a current system will be charged on a pro-rata basis of 1/12th per month remaining before the renewal date.

Future potential plans
(beyond scope of the initial Easy CRM deployment)

FULL LIST OF MODULES AVAILABLE FOR UPGRADE TO PROSPECTSOFT PROFESSIONAL

1. Screen Customiser
2. XML API*
3. Business to Business Contact Manager
4. Business to Consumer Contact Manager
5. Campaign Manager
6. Telephony Integration
7. Document Manager
8. Sales Ledger Integration
9. Sales History
10. Purchase Ledger Integration
11. Purchase History
12. Products and Pricing
13. Sales Lead Tracker
14. Quotation Engine
15. Sales Order Processing
16. Problem Tracker
17. Infobase Searching
18. Problem Analysis Matrix
19. Service Contracts
20. Inventory Manager
21. Advanced Relationships
22. Report Writer and Toolkit
23. Real-Time Data Tunnel
24. SOAP/.Net API

This is a full list of modules available in the ProspectSoft Professional CRM solution more details of which are available on request.

ProspectSoft also have a variety of vertical market plug-ins, a full list of available software can be found at:

www.prospectsoft.com/options

Easy CRM Project Cost

	Quantity	Cost per item	ALF
CRM System Manager	1	£1000.00	140.00
(Maximum LAN &	Each	£395.00	£63.20
10 users in total) Mobile	Each	£495.00	£79.20

GENERAL PRICING NOTES:

1. All prices quoted exclude VAT.
2. Prices are subject to change without notice.
3. Only 1 System Manager is permitted per system.

LICENSE CHANGES:

1. Network clients can be upgraded to mobile clients by paying the difference in price for the system specification at the time of licence upgrade (subject to user count restrictions).
2. No ALF or software can be refunded as a result of licensing changes. Reduced ALF charges, where applicable, will apply from the next annual renewal.

Project Terms Outline

Standard terms apply to this project. However with the simplified and standardised Easy CRM project, the payment terms are similarly simplified and clarified:

- 50% Initial Payment with Order
- 30% When your system is created and demonstrated (WIP partial invoices may be made during the system creation phase if necessary)
- 20% retainer becomes due upon successful completion of training and handover

These percentages refer to the order value, including any configuration, Annual licence fees and support fees. For full terms and conditions, please refer to your ProspectSoft reseller.

Order Acceptance

ProspectSoft strongly believe that our solutions could be of great benefit to your business and hope that we will be able to welcome you as a ProspectSoft Web Solutions user very soon.

In order to proceed with this proposal please sign your acceptance below.

From: {division_divname}

To:

Company Registration No:

Agreement Date:

Please accept this confirmation of our wish to proceed with the proposal for the ProspectSoft Easy CRM Solution.

I understand that the implementation team will contact me shortly to confirm a project manager and a schedule for implementation.

Signed:

Signed:

Print:

Print:

For and on behalf of

Reseller Acceptance:
