

# Ready Express



## Accelerated CRM On Demand Implementation Solution

### eVerge Group CRM ReadyExpress Process

With eVerge Group CRM ReadyExpress implementation packages, you can expect to be live on your own hosted instance of Oracle CRM On Demand in four, six, or eight weeks (depending on the package selected). The CRM ReadyExpress packages are designed to ensure that our implementations deliver the right amount of functionality to get you up and running quickly, educating you and your staff on how to administer and support the system, while preparing to take the next step.

## Getting Started

- 1. Select the ReadyExpress package (1, 2, or 3)** that best fits your needs
- 2. Contact eVerge Group** through your Sales Representative or [www.evergegroup.com](http://www.evergegroup.com) to begin the processes for:
  - Purchasing Oracle CRM On Demand licenses
  - Obtaining the ReadyExpress contract
  - Scheduling the start date for your ReadyExpress implementation

Once the paperwork is in place, you will receive a ReadyExpress Prerequisites Package. Simply follow the steps and your organization will be just weeks away from going live with Oracle CRM On Demand.

If you do not find a CRM ReadyExpress package that fits your needs, eVerge Group offers custom implementation and support services that will fit your needs. Please contact us for details.

### Contact Information

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CRM ReadyExpress is designed to easily take customers live with Oracle CRM On Demand in a compressed timeframe through a set of predefined deliverables and implementation process and templates. We offer three rapid implementation packages, designed to meet diverse requirements.

## eVerge Group ReadyExpress Package Comparison Grid

### Deliverables Defined

Deliverables	eVerge Group CRM On Demand		
	Ready Express 1	Ready Express 2	Ready Express 3
Number of users	30	60	80
Levels Organization Structure	3	4	5
Roles and Access Profiles	2	3	4
Sales Process with Sales Coach	1	1	3
Workflow Processes	2	3	5
Assignment Manager Rules	2	3	5
Custom fields per object for Accounts, Contacts, Campaigns and Opportunities	20	30	30
Field validation rule per object for Accounts, Contacts, Campaigns and Opportunities	2	3	4
Initial data migration of records per object for Users, Accounts and Contacts	None	5,000	7,500
eVerge Group ReadyExpress SFA documentation pack	Yes	Yes	Yes
Professional Assessment – Suggested future phase path	Yes	Yes	Yes
Post Production Support Hours	10	20	35
Cost to Implement (software license fee not included)	\$25,000	\$35,000	\$50,000

- **Number of users** – The numbers in each package are considered an upper limit.
- **Levels of Organization Structure** – This affects both reporting and the complexity of the visibility model.
- **Roles and Access Profiles** – This affects both reporting and the complexity of the visibility model.
- **Sales Process with Sales Coach** – For each Sales Process defined, an accompanying Sales Coach is defined.
- **Workflow Processes** – Workflow Processes complement the Sales Process with automation at various steps.
- **Assignment Manager Rules** – Automatic assignment of records to an individual or team based on pre-defined criteria.
- **Custom Fields per Object** – Net new custom fields for the Account, Contact, Campaigns and Opportunity objects.
- **Field Validation Rules** – Rules to enforce requirement based on another field value.
- **Initial Data Migration** – Number of records imported per object prior to go-live.
- **SFA Documentation Pack** – Complete documentation set for SFA ReadyExpress implementation including Object Definition Docs, SFA Process docs and Field Level mapping docs.
- **Professional Assessment** – CRM On Demand professional assessment based on your implementation. Essentially a roadmap of where you should take CRM On Demand in future phases whether your company performs the work or eVerge Group is engaged to help.
- **Post Production Support Hours** – Hours included for post production support. With any ReadyExpress package, your company is qualified for a time only support contract with no minimum.

## ReadyExpress 1 for SFA

### eVerge Group ReadyExpress Timeline

Week 1 Overviews	Week 2 Req./Config	Week 3 Config/Test	Week 4 Go Live!	Week 5 Support	Week 6	Week 7	Week 8	Week 9
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#### WEEK 1...

- **Overview Training Sessions:** An eVerge Group Consultant will lead client participants through a series of overview training sessions, beginning with the ReadyExpress implementation Process Overview.
- **Setup Administration Data:** Admin design sessions will be conducted to develop security sign in models, modifying specific functionality at the enterprise level, etc.
- **Define Roles & Data Access:** Utilizing a structured approach, user roles, data access, and system privileges for the user community will be defined.
- **Sales Process Definition:** Design sessions will be conducted to model your sales process in CRM On Demand, complete with Sales Coach and automation.

#### WEEK 2...

- **Screen Requirements & Design:** Screen and field layouts will be designed.
- **BPA Requirements & Design:** Business Process Automation design sessions for WorkFlow and Assignment Rules for automation will be conducted.
- **Configuration:** Configuration of your CRM On Demand

environment begins.

#### WEEK 3...

- **Configuration:** Configuration of your CRM On Demand environment continues.
- **Test and Prep:** Unit testing the system and deployment prep for go-live will take place.

#### WEEK 4...

- **Test and Prep:** Unit testing and deployment prep will be completed.
- **Documentation Delivery:** SFA Documentation Pack will be completed and delivered.
- **Go-Live Delivery:** eVerge Group will turn over your CRM On Demand production system ready for you to deploy.
- **Future Path Roadmap:** An assessment of your system and business processes with a recommended direction to take your CRM On Demand deployment.
- **Support:** eVerge Group will be standing by to support your CRM On Demand deployment as needed.

# ReadyExpress 2 for SFA

## eVerge Group ReadyExpress Timeline

Week 1 Overviews	Week 2 Requirements	Week 3 Config	Week 4 Migrate Data	Week 5 Test & Prep	Week 6 Go Live!	Week 7 Support	Week 8	Week 9
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### WEEK 1...

- **Overview Training Sessions:** An eVerge Group Consultant will lead client participants through a series of overview training sessions, beginning with the ReadyExpress implementation Process Overview.
- **Setup Administration Data:** Admin design sessions will be conducted to develop security sign in models, modifying specific functionality at the enterprise level, etc.
- **Define Roles & Data Access:** Utilizing a structured approach, user roles, data access, and system privileges for the user community will be defined.
- **Sales Process Definition:** Design sessions will be conducted to model your sales process in CRM On Demand, complete with Sales Coach and automation.

### WEEK 2...

- **Screen Requirements & Design:** Screen and field layouts will be designed.
- **BPA Requirements & Design:** Business Process Automation design sessions for WorkFlow and Assignment Rules for automation will be conducted.
- **Configuration:** Configuration of your CRM On Demand environment begins.

### WEEK 3...

- **Configuration:** Configuration of your CRM On Demand environment continues.

### WEEK 4...

- **Configuration:** Configuration of your CRM On Demand environment continues.
- **Data Migration Mapping:** Data mapping is developed for initial data migration.

### WEEK 5...

- **Data Migration:** Data migration into your CRM On Demand environment takes place.
- **Test and Prep:** Unit testing the system and deployment prep for go-live will take place.

### WEEK 6...

- **Test and Prep:** Unit testing and deployment prep will be completed.
- **Documentation Delivery:** SFA Documentation Pack will be completed and delivered.
- **Go-Live Delivery:** eVerge Group will turn over your CRM On Demand production system ready for you to deploy.
- **Future Path Roadmap:** An assessment of your system and business processes with a recommended direction to take your CRM On Demand deployment.
- **Support:** eVerge Group will be standing by to support your CRM On Demand deployment as needed.

# ReadyExpress 3 for SFA

## eVerge Group ReadyExpress Timeline

Week 1 Overviews	Week 2 Requirements	Week 3 Config	Week 4 Config	Week 5 Config	Week 6 Migrate Data	Week 7 Test & Prep	Week 8 Go Live!	Week 9 Support
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### WEEK 1...

- **Overview Training Sessions:** An eVerge Group Consultant will lead client participants through a series of overview training sessions, beginning with the ReadyExpress implementation Process Overview.
- **Setup Administration Data:** Admin design sessions will be conducted to develop security sign in models, modifying specific functionality at the enterprise level, etc.
- **Define Roles & Data Access:** Utilizing a structured approach, user roles, data access, and system privileges for the user community will be defined.
- **Sales Process Definition:** Design sessions will be conducted to model your sales process in CRM On Demand, complete with Sales Coach and automation.

### WEEK 2...

- **Screen Requirements & Design:** Screen and field layouts will be designed.
- **BPA Requirements & Design:** Business Process Automation design sessions for WorkFlow and Assignment Rules for automation will be conducted.
- **Configuration:** Configuration of your CRM On Demand environment begins.

### WEEK 3...

- **Configuration:** Configuration of your CRM On Demand environment continues.

### WEEK 4...

- **Configuration:** Configuration of your CRM On Demand

environment continues.

### WEEK 5...

- **Configuration:** Configuration of your CRM On Demand environment continues.

### WEEK 6...

- **Configuration:** Configuration of your CRM On Demand environment continues.
- **Data Migration Mapping:** Data mapping is developed for initial data migration.

### WEEK 7...

- **Data Migration:** Data migration into your CRM On Demand environment takes place.
- **Test and Prep:** Unit testing the system and deployment prep for go-live will take place.

### WEEK 8...

- **Test and Prep:** Unit testing and deployment prep will be completed.
- **Documentation Delivery:** SFA Documentation Pack will be completed and delivered.
- **Go-Live Delivery:** eVerge Group will turn over your CRM On Demand production system ready for you to deploy.
- **Future Path Roadmap:** An assessment of your system and business processes with a recommended direction to take your CRM On Demand deployment.
- **Support:** eVerge Group will be standing by to support your CRM On Demand deployment as needed.