

SIFTING THROUGH SALESFORCE CRM SERVICE PROVIDERS

thinkware[®]
salesforce.com consulting

Experience, our Experience!


Dataflo
consulting

salesforce.com[®]
Registered Consulting Partner

To learn more or schedule a no obligation consultation, go to www.mydataflo.com or call 800-826-2859

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About Dataflo Consulting Corporation

Located in Omaha Nebraska company Founder Steven E. Campisi has been exploiting emerging technology markets and swiftly leveraging inherent intellectual property since Dataflo's inception in 1984. Throughout the history of Dataflo, we've designed, built, and deployed software systems across various verticals throughout North America. Dataflo most recent and notable achievement is the design and development of portable biometric devices the size of a credit card (first in the world, Factor4) with two patents granted. The core competencies of Dataflo are the technological intellect, vision with no boundaries, the applied science of process engineering, and the vision to seek new ways of doing old things and add significant value to our clients.

Dataflo's experienced development team use a mix of Agile-based principles and Scrum practices to provide a flexible delivery model that scales to meet the needs of projects from large to small.

Our engineering center in Omaha, Nebraska is staffed with certified developers, and test engineers and project managers who are skilled in methods to deliver a quality project on time and within budget.

Dataflo's development services are guided by a strategic vision for your business and a rigorous approach to project management. When it comes to ensuring a new product's success, we're as conservative and careful as they come. It's a Midwest thing!

We are passionate about innovation and new approaches, a better process or improved technology that can take your operations from everyday to exceptional. We understand how to provide your clients with meaningful valued services and execution that build fortresses to keep competitors at bay.

The real difference with Dataflo; we understand business principles and processes, it is always our expectation to exceeds your expectations!

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Since 1984

salesforce.com®
Registered Consulting Partner

Fixed Retainer - By Project or Long Term Resources

Dataflo offers a variety of options to fit budgets big & small

ADMINISTRATOR -



Setting up new and decommissioning old users, user profiles, email templates, HTML documents, page layouts, field labels, workflow rules, approval process, email alerts. Help desk to cover questions on use and issue reporting. Additional support by way of email and Dataflo's project portal.

CONSULTING -



On-line meetings with management and users to understand requested changes. The result is a collaborative approach to ensure meaningful and actionable dialog to establish strong software process and design controls.

CUSTOMER SPECIFIC CHANGES -



Managing your CRM interface requiring "click throughs" or format changes of screens and fields. Expanding or developing functionality utilizing Visualforce and Apex code.

DEVELOPMENT PRACTICES-



When it comes to serious design and process flow, Dataflo's experienced development teams use a mix of Agile-based principles and Scrum practices to provide a flexible delivery model that scales to meet your current needs.

Our Development Center is staffed with teams of senior analysts, developers, and test engineers who are skilled in methods to lower development times and duration, improve ROI and deliver quality Visual Force and Apex development.

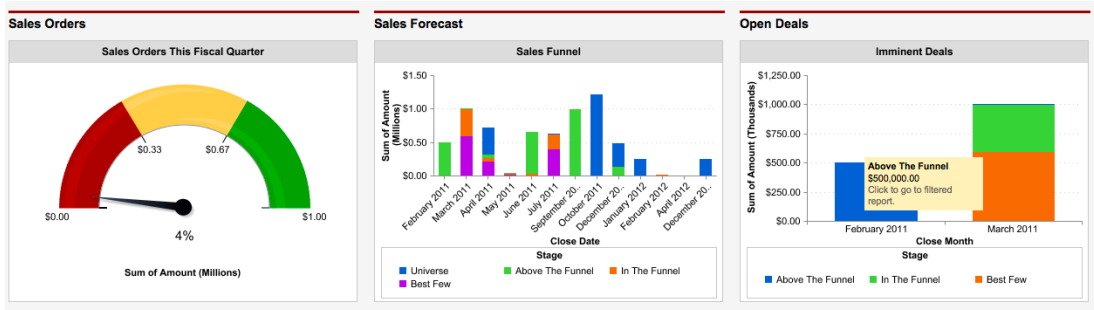
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AT THE END OF THE DAY

IT'S ABOUT MEANINGFUL AND ACTIONABLE INFORMATION DERIVED FROM THE DATA COLLECTED.

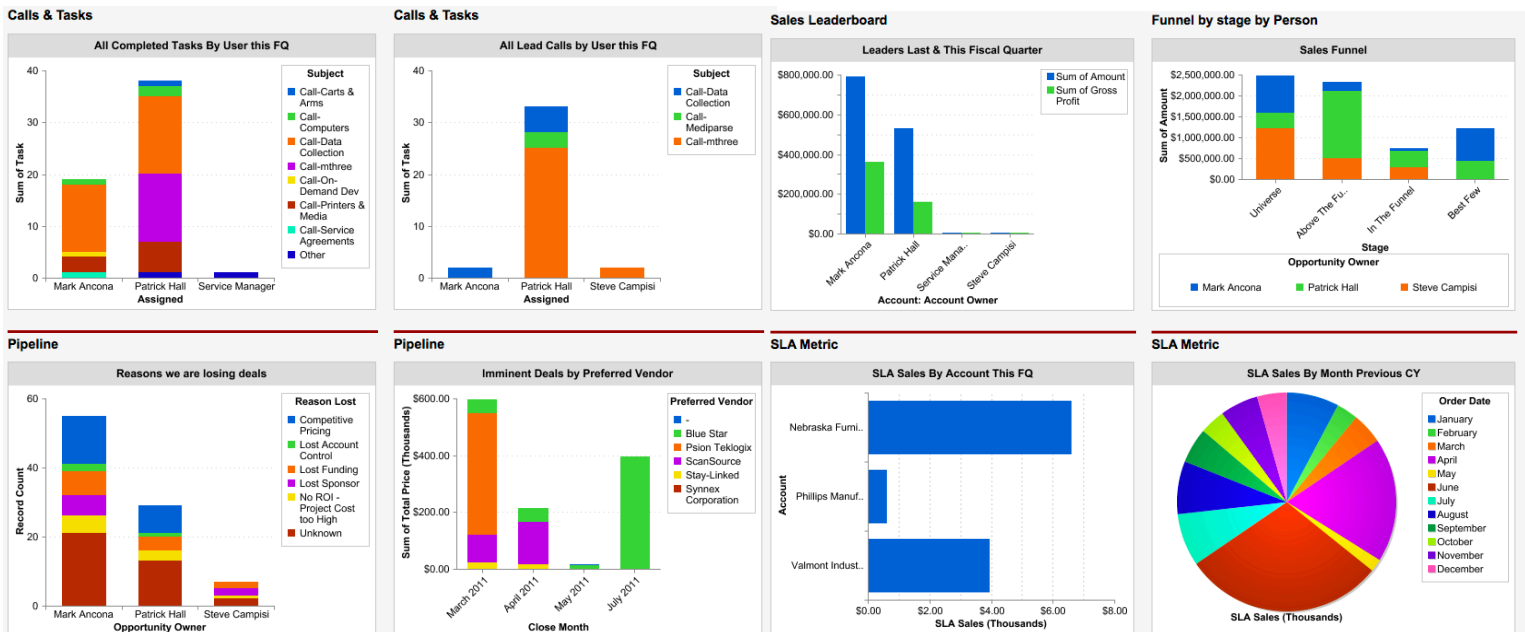
Understanding workflow from every customer touch throughout the sales process is innate at Dataflo. We take the guess work out of sales forecasting by adhering to proven processes and actionable workflows. No matter what business you're in, sales is what drives companies, we just tweak the processes to fit your business model.



Four common phrases-

- What does my sales group call list look like?
- How many current customers have they contacted?
- How many calls have they made for new business?
- What were the results for all this activity?

Get S.M.A.R.T with the most advanced reporting tool in industry. Delivering Specific Meaningful & Actionable, Realistic & Timely information in dashboard views for at a glance management.



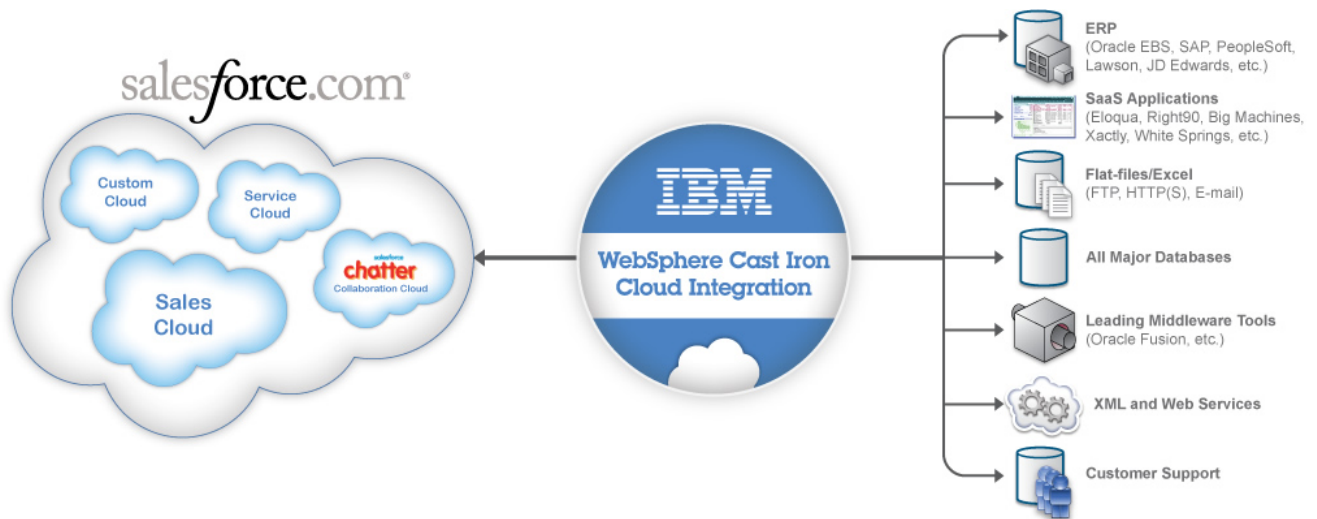
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SYSTEMS INTEGRATION

Salesforce CRM Leveraged with Dataflo Consulting

Dataflo provides first hand experience with:

- Web Services API
- IBM - Cast Iron Middleware
- Pervasive Middleware
- SF - Financialforce



KEY VALUE-ADDED ELEMENTS:

Dataflo is a specialized consultancy and development group with proven experience designing, building and maintaining SaaS and mobile applications. This extensive and focused experience has helped us gain a unique understanding of the issues and to build best practices for the development and operation of successful SaaS applications. Considering this experience, we have developed structured engagements to carry out assessments very efficiently, using custom checklists and automated tools to ensure a thorough analysis. This provides a process that covers all the potential issues and problems while developing a specific set of recommendations and plans for improvement.

Our assessment engagements are comprehensive and cover all aspects that will affect the performance, scalability, manageability and security of the application:

Application Architecture - Application Security-Tenancy Model - Provisioning Model-Integration Capabilities - Database Design - Infrastructure Architecture - Usability and Accessibility - Contingency Processes - Development Practices.

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PROCESS & PROJECT MANAGEMENT

Dataflo uses a time-tested set of development processes to address your technology needs. Rigorous project management is an integral part of our culture. Delivering projects on task, on time and in budget aren't goals to be reached, they're assumptions clients can take for granted.

Dataflo Manages all projects through a web based projects portal. Below are screen shots of an actual project and all the information captured and displayed to the stake holders through a collaborative interface. This feature indicates what is being worked on, how much time is left, the approval process for new requests and project creep.

Email workflow request notice of new development item.



Project manager screen for approval or denial of request.

The screenshot shows the Matrix project manager interface. The main content area displays an approval request for a development item titled "Java Heap Allocation increase".

Approve/Reject Approval Request

Brief Description: Java Heap Allocation increase
Comments: Development Approved

Buttons: Approve, Reject, Cancel

Approval History

Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1 (Pending for first approval)					
4/7/2011 11:44 AM	Pending	CRM Admin	CRM Admin		Pending
Approval Request Submitted					
4/7/2011 11:44 AM	Submitted	CRM Admin	CRM Admin		

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PROJECT MANAGEMENT:

Pending Approval and Approved Screens, Public Facing.

Development Item
Java Heap Allocation increase
 < Back to List: Custom Object Definitions

Approval History (2)

Development Item Detail [Unlock Record] [Edit] [Delete] [Clone]

Brief Description: Java Heap Allocation increase
 Project: [Proxibid: Integration Management](#)
 Record Type: Enhancement Request [Change]
 Enhancement Description: Increase the amount of the Java Heap for all Java programs running on the server
 Development Notes:
 Resource Assigned:
 Approved:

Status: Waiting on Approval
 Priority: Low

Estimated Development Hours:
 Created By: [Project View Site Guest User](#), 4/7/2011 11:41 AM
 Last Modified By: [Project View Site Guest User](#), 4/7/2011 11:41 AM

[Unlock Record] [Edit] [Delete] [Clone]

Approval History [Recall Approval Request] [Approval History Help ?]

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1 (Pending for first approval)						
Reassign Approve / Reject	4/7/2011 11:44 AM	Pending	CRM Admin	CRM Admin		Pending
Approval Request Submitted						
	4/7/2011 11:44 AM	Submitted	CRM Admin	CRM Admin		

Development Item
Java Heap Allocation increase
 < Back to List: Custom Object Definitions

Approval History (2)

Development Item Detail [Edit] [Delete] [Clone]

Brief Description: Java Heap Allocation increase
 Project: [Proxibid: Integration Management](#)
 Record Type: Enhancement Request [Change]
 Enhancement Description: Increase the amount of the Java Heap for all Java programs running on the server
 Development Notes:
 Resource Assigned: David Affentranger
 Approved:

Status: Not Started
 Priority: Low

Estimated Development Hours: 2.00
 Created By: [Project View Site Guest User](#), 4/7/2011 11:41 AM
 Last Modified By: [CRM Admin](#), 4/7/2011 11:50 AM

[Edit] [Delete] [Clone]

Approval History [Submit for Approval] [Approval History Help ?]

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1						
	4/7/2011 11:50 AM	Approved	CRM Admin	CRM Admin	Development Approved	Approved
Approval Request Submitted						
	4/7/2011 11:44 AM	Submitted	CRM Admin	CRM Admin		

OUR CLIENTS



Proxibid started as a marketing and technology firm for auction companies.

Our beginning as an add-on for auction companies wanting to bring their auctions online has served us well. We've developed relationships with more than 2,500 auction companies and hundreds of thousands of bidders worldwide, helping to bring more qualified buyers and sellers together than any other online provider in the industry.

The auction industry has embraced the Internet and our focus has evolved. The same technology that drove auction companies and bidders to the Internet is now a critical component to nearly every auction across the globe. Businesses expect to bring their auctions online and bidders demand it. Our strategy has allowed us to develop into business consultants and technology experts who understand the specific needs of the auction industry, enabling Proxibid to become the world's largest real auction marketplace, delivering the most trusted, sophisticated and intuitive products and services in the industry. We're constantly adapting to the changing needs of our growing marketplace. But we'll always know how we got here.

The Project:

Dataflo was approached after Proxibid had lost their internal Salesforce CRM developer. Proxibid decided to retain Dataflo as their external CRM administrator, developer and consultant on current design and future integration design. We started the Project in March 2011 with a scope and priority of work determined by management. Dataflo engineers and account management met with the users in each affected area where system changes were required. FinancialForce integration to Salesforce was our first priority item. This in itself was a large and long term project. Dataflo was challenged to not only look to the future for Proxibid but to establish current methods and business processes with the Salesforce instance.

Areas that will be worked on is the communications and integration with ERP and Salesforce. The original design will have to be reversed for better management of the call out limitations that are inherent in Salesforce.com CRM along with integration of the phone system to Salesforce. On an ongoing basis, we are charged with support, changes, additions and other general requests.

110 Salesforce users. Integration to ERP using web services.

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OUR CLIENTS



IT Convergence is a global enterprise application services provider with core competencies in Oracle Consulting, Development, Education, Hosting and Support Services. Our comprehensive full-service value offering allows you to streamline the process of implementing, upgrading or customizing an application, supporting your environment and effectively managing the application lifecycle.

Founded in 1998, IT Convergence has successfully partnered with more than 600 top companies, in over 50 countries around the world, delivering senior-level expertise which spans the enterprise application and technology stack. We are committed to providing the highest caliber resources available to our clients, and this is reflected in the quality of our team. Our Executive team leadership assures our standards for excellence translate into consistent on-the-job performance and long-term customer relationships. We help you focus on results, defined by you, the client. As your strategic partner, we can help you accomplish more.

The Project:

IT Convergence provides consulting, IT support, and hosting services to clients across the world. In 2010 we took on an initiative to move from our current CRM system to Salesforce. Salesforce does a good job convincing potential clients that the solution is more or less ready to go out of the box and that configuration and IT support can be kept to a bare minimum. After 8 months of struggling with a less than optimal solution, we decided it was time to start over. With multiple offices located Stateside, and international locations in Asia, Europe, and South America, we realized that the level of configuration needed to start leveraging our investment in Salesforce was more than we were able to take on internally. After reviewing a variety of potential consulting partners, from large firms to independent contractors, we decided to try Dataflo Consulting out of Omaha Nebraska.

From the beginning there were concerns that Dataflo (a small company) might not have the bandwidth to support an organization as distributed as ours. However, after achieving rapid results on two small projects we decided to contract Dataflo for a 12 month retainer agreement where we would have access to an agreed upon number of hours per month at a discounted hourly rate. The results have been outstanding. We've achieved more progress in the last 3 months than in the entire first 8 months after we deployed Salesforce. Dataflo's flexibility is probably their single greatest strength, but they have also demonstrated a keen sense of understanding in how we run our business. As they've come up to speed, I have seen their ability to suggest alternative strategies and point out industry best practices increase.

Bottom line is that the Dataflo support team has become an extension of our organization. I treat their analysts no differently than a full ITC team member and hold them to the same high level of expectations when it comes to responsiveness, and quality.

110 Salesforce users. Integration to ERP using web services.

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Dataflo Rate Sheet for Salesforce.com and Force.com

Standard Hourly Rates:

- ❖ Off-site development is \$145 per man hour.
- ❖ Off-site Implementation is \$125 per hour.
- ❖ Off-site Administration is \$125 per man hour.
- ❖ Process Engineering Consulting on site is \$175 per hour.
- ❖ On-site development is \$225 per man hour.
- ❖ On-site Implementation is \$175 per hour.
- ❖ On-site Administration is \$145 per man hour.

Our retainer program was created to purchase a set amount of hours over a twelve month period at a substantially discounted rate. The hours are billed out monthly to fit most any budget. Hours can be applied from one month to another if not used or can be borrowed from future months upto three months. The agreement can be adjusted at each quarter within the twelve month term for more or less hours.

Most project Statements of Work can be gathered via televideo or phone conferences. The client will be assigned an account manager, project manager and an engineer that will be doing most of the work. Regular scheduled meetings are set to review milestones and project creep if any. The Dataflo “projects portal” is a web-view into how our engineers are doing on current work and allow the client staff to list new projects or request changes.