

# FSC QuickStart Packages

**Financial Services Cloud (FSC)** helps to address key business needs of financial companies of all sizes, who look to FSC for achieving their business goals like 360° customer view, and real-time requirements for quicker access to more data.

## Standard Package

- Identify FSC use cases & features to leverage
- Identify architectural components of Salesforce FSC & its associated product packages
- Define a high-level conceptual FSC architecture, with integrations landscape
- Configure baseline FSC with supporting documentation
- Setup Standard workflows and properties
- Scope & plan for a QuickStart engagement
- Define & assess project by certified architect/consultant
- Configure existing apps for a journey to unify customer & employee experiences, bridge channels, geographies, consumer & commercial LoBs to drive customer success
- Setup clients, households and financials data model for any of banking, wealth management, insurance, lending modules for financial services customers
- Configure client relations mapping, B2C/B2B accounts referral management with expressed interest etc.
- Setup Einstein Analytics for FSC
- Define strategy for code promotion & deployment

“R Systems has been a top-notch partner for us through custom development & massive salesforce integration.”

– Leeann Lynch, COO | Lendistry

“RSI is professional, thorough, and very knowledgeable on Salesforce. They've exceeded all our expectations.”

– Shelly Espich, Technology Director | Greater Cincinnati Foundation

“R Systems pricing is very competitive. They've good experience in Salesforce administration & custom dev.”

– Paul Dysko, IT Director | Paystone

## Enhanced Package

(Standard Package + below)

- Navigate the other application landscape architecture to access core systems that will be connecting to FSC
- Use AppExchange connectors to interact with various partners sources & targets that integrate with FSC
- Setup custom workflows, approvals & properties needed for business to function, apart from out of the box features
- Implement standard templated customer portal/community, with customized workflows
- Action plans, lightning scheduler & productivity cards
- Life events & business milestones
- Smart need-based referrals (standard) & scoring (add-on)
- Client segmentation Einstein Analytics app
- Standard cases, alerts, entitlements, goals and milestones

## Advanced Package

(Enhanced Package + below)

- Complex custom workflows leveraging lightning components & apex.
- Implement complex integrations leveraging custom APIs, batch apex & large data volumes
  - Accutech | Black Diamond | Stripe
- Salesforce Shield & Surveys
- Custom dashboards using Einstein Analytics
- Prep data & identify use cases for leveraging predictive analytics & Einstein features
- Advanced support after go-live