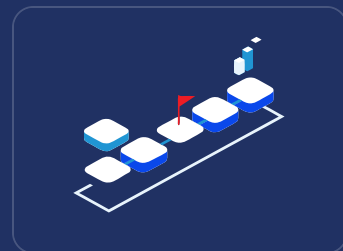


SALESFORCE · FINANCIAL SERVICES CLOUD · GROWTH

Financial Services Cloud Growth

FSC for a growing practice: three business processes, an Agentforce advisor agent, Shield encryption and a compliance review queue for client communications.


PRICE
From \$48,000
TIMELINE
8-12 weeks
SIZED FOR
35-100 users
WHAT'S INCLUDED

- Everything in Foundation
- Up to 100 users
- Up to 3 business processes (e.g. onboarding, service requests, annual reviews)
- Agentforce advisor or banker agent enabled with 1 topic and up to 3 actions, tested against 10 cases
- Shield Platform Encryption and Event Monitoring configuration if licensed
- Compliance review queue for client communications
- Migration of up to 25,000 records
- 1 Vantage Point accelerator
- 4 trainings
- Custodial or core-banking integration is added with the custodial add-on (from \$12,000 per custodian)

NOT INCLUDED

- Custodial, core-banking, mortgage or loan origination integrations (add-on or quoted)
- Custom-built connectors
- Records beyond 25,000
- Agents beyond 1 topic
- SEC 17a-4 archiving vendor setup

You provide

- Compliance team time to approve the review queue rules
- Process owners for each business process

Assumptions

- FSC and Agentforce licenses in place
- Source data exportable

Done means: All processes live; agent passes the agreed test cases; Shield configured; migration reconciled.

COMMON QUESTIONS

Is Growth available as time and materials? Yes. Until we have delivered three fixed-price Growth packages, Growth and Enterprise are also offered as time and materials at \$205 per hour with a not-to-exceed.

Standard on every package. Every Launch package includes a named senior consultant from kickoff to go-live, a written project plan, weekly status, build and test in a sandbox where the platform has one, one UAT cycle, admin documentation, recorded training and 30 days of hypercare. Never included: software licenses, custom code unless listed, integrations not named, content beyond the numbers listed, legal or compliance approval, on-site work and travel.



Talk to a senior consultant

vantagepoint.io/packages/salesforce-financial-services-cloud-growth

Book a free 30-minute CRM assessment: vantagepoint.io/get-started

Full scope, FAQs and the latest price are on the package page.