

SalesLoft Onboarding Packages

Professional Services

Learn

Operationalize

Finetune

Transform

Premier

Expert Help at Every Step

A hands-on onboarding experience for teams up to 30 - 50 users, and 1 - 2 user groups looking for 1-on-1 attention and hands-on workshops. We offer 2 Premier options based on your needs:

Premier	Premier Plus	
6 - 8 weeks	8 - 12 weeks	Typical Onboarding Duration*
✓	✓	Workshop: Onboarding Kick-off
✓	✓	Workshops: Platform Configuration
✓	✓	Workshops: Deployment & Q&A
Webinar	✓	Workshops: Process & Automation
✓	✓	Workshop: Analytics Workshop
✓	✓	Workshops: Administrator & Manager Training
✓	✓	Workshops: End-User Training
–	✓	Advanced Configuration
1	2	Admin eLearning and Certification
✓	✓	Six Month Health Check
Office Hours	Office Hours	
Up to 30 users 1 user group	Up to 50 users 2 user groups	

Our **Implementation Consultants** partner with you to understand your goals and challenges to configure your instance, build workflows, and educate your users.

Essentials

Webinar-based for Smaller Teams

A webinar-based onboarding experience for teams of up to 20 users and 1 user group looking to get going, fast.

Included Webinars
Onboarding Kick-off
Platform Configuration
Process & Automation
Team Training
Analytics

The Essentials package includes an **Implementation Consultant** to guide you through the onboarding experience, with **1-on-1 checkpoints and office hours**.

Typically complete in 2-4 weeks, depending on complexity

All packages offer a Salesforce testing environment and configuration, with an additional charge.

Custom

Aligned to Your Unique Needs

If your requirements / preferences exceed or are not addressed by our published packages or your team is larger than 50 users / 2 user groups / 2 geos, custom onboarding is available. Built upon the foundation of SalesLoft best practices and customized to fit your business needs.

Custom Offerings
Strategy & Content
Configuration
Technical
Auditing
Education

Ask about our **Expert Services** for ongoing expert support post-onboarding.