



Overview of QuickStart Services

By Greg Robin

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Firm Overview

Productivity Advisors is a technology consultancy that advises **Fortune 5,000,000** companies on how to use web-based (on-demand), solutions to enhance business productivity and efficiency.

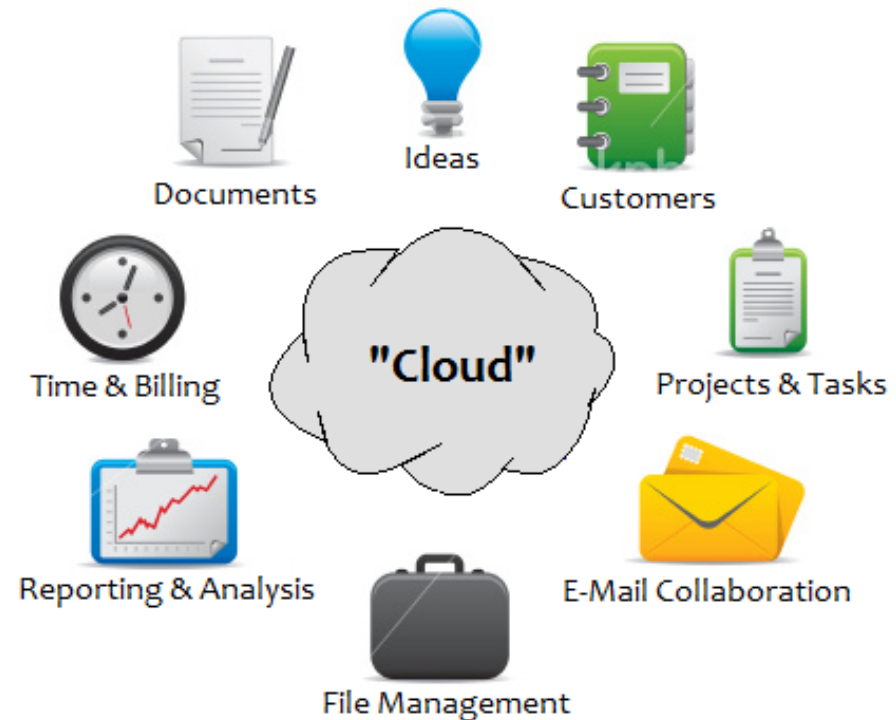
Our Goal: Deliver the insights and advice necessary to help our clients achieve greater business profitability.

Where Does QuickBase Help?

Collaborative Productivity.

Get your teams on the same page using simple web-based apps.

- Nothing to install
- No IT dept needed
- Works on Macs & PCs
- "One version" of the truth
- Data backed-up "in the Cloud"
- Always using latest version



Advantages of QuickBase

- **Fast:** Run ready-made apps or create your own in days.
- **Easy:** Navigate and train on intuitive applications in minutes.
- **Centralized:** Because QuickBase is web-based, there's one central home for all your information — with anytime, anywhere access for your entire team.
- **Proven:** 53 of the Fortune 100 companies have embraced QuickBase solutions.
- **Secure:** Strict security safeguards and procedures protect your data.
- **Trusted Name:** QuickBase is provided by Intuit, the leading global ASP and Fortune 500 Company.

Why a QuickStart Package?

Developing, deploying and supporting a software system in any environment can be time consuming and resource intensive.

- Intuit's QuickBase Solution is easy to use and quick to configure providing you have the right skills and support in place.
- Your development, deployment and roll-out will require planning and management, and may initially demand more technical skills and capacity than is available.
- Following deployment, in the early stages of usage, there may be an increased need for technical support, which could prove challenging with limited resources.
- Ongoing support may also be a challenge, since responsiveness to users' needs is critical to building and maintaining a positive experience for internal and external audiences.

Whether you are on the business side, the IT leader or some combination, Productivity Advisors can support you in your development, deployment and ongoing technical support of your QuickBase Solution.

QuickStart Package Description

An initial package of 20 hours of QuickBase consulting time for any/all of the following services (customized to your needs):

- Determining business requirements (problem to be solved)
- Data analysis (data structures, relationships and data clean-up)
- Prototyping a solution
- Iterative development (independent or alongside your team)
- Deployment planning (user adoption, training, documentation)
- Maintenance and support (determining future features and supporting use and adoption of the system and QuickBase in your organization)

Please refer to our “10 Steps to Defining a QuickBase Solution” for more details on our development methodology. (<http://productivityadvisors.com/10.html>)

Typical Timeline

Standard project tasks (time is duration, not effort)

- Team interviews and questionnaire intake (1 week)
- Development of business requirements (1 week)
- Data analysis (1 week)
- Prototyping a solution (1 week)
- Iterative development (2-4 weeks)
- Deployment planning (1-2 weeks)
- Deployment & Training (2-3 weeks)



discover



design



develop



deliver

Some of our Experience (with QuickBase)

Clients	Types of Projects & Solutions Delivered	Industry
American Chemical Society	IT help desk process management	Government
APM Music	Custom project management	Entertainment
Decision One	Customer relationship management (CRM)	Info Tech
Intercredit Bank	Loan reporting and auditing	Financial
Intuit	Knowledge management, CRM and reporting analytics	Financial; Software
Legal Momentum	Customer and partner relationship management	Non-Profit
Marketshare	Custom project and process management	Real Estate
Microcell	Customer relationship and order management	Telecomm
Nautica	Merchandise project management and reporting analytics	Retail
Orion's Mind	Student information management and reporting	Education
Pacific Yacht	Customer relationship and order management	Manufacturing
PacRim Pathology	Business workflow, CRM and e-mail outsourcing	Healthcare
Sylvan	Student information management and reporting	Education
Uncle Milton	Custom program management	Manufacturing
WalMart	Project and resource management	Retail
Warner Bros.	Custom project and process management	Entertainment

Pricing & Services Offered

We work with your business team to develop a phased, budgeted approach. Of course, project time estimates are always approximate and depend on the complexity of scope, timing and deliverables.

- Fee structure options:
 - ❖ Time & materials: For situations where business requirements are not refined, we define engagements by phases/milestones, billed hourly
 - ❖ Fixed bid: With adequate requirements from our Clients, we can provide a fixed bid proposal
 - ❖ Retainer relationships: Some Clients require a longer term relationship, structured to their particular needs (weekly/monthly)
- Services offered:
 - ❖ Advise & coaching: Hourly relationships (5 or more hrs) to help your team select vendors, do basic configurations, develop training, produce documentation or help with organizational adoption
 - ❖ Analysis & prototyping: Situations where clients are not sure of the size of scope, we can help you determine what to deploy and when
 - ❖ Custom development: Engagements where we do discovery, design, development and delivery of customized or custom solutions

Additional Services Offered

- Application Enhancements (for Existing QuickBases)
 - Dashboard Customization
 - Enhanced Data Entry Forms (with Conditional Rule logic)
 - Exact Form Development (custom designed Forms for invoices, proposals, etc...)
 - Integration with other Desktop and Web Applications
 - Mobilize your QuickBase
- Custom Training (specific to your QuickBase application)
- Data Backup & Migration
- Documentation & Guides
- Usage Audit

Contact

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