



SALESFORCE AND SLACK

Quick Start

Your Salesforce records, alerts and approvals where your team already works.

SCOPE 1

Launch

\$4,500

2 weeks

SCOPE 2

Most popular

Growth

\$7,500

3 weeks

SCOPE 3

Scale

\$11,000

4 weeks

One clear outcome, three levels of complexity

Every scope connects one Salesforce org to one Slack workspace and puts working record alerts, actions and channel conventions in front of your team. What changes is the number of teams covered, the volume of alerts and actions, whether approvals and workflows are included, and how much governance is put around it. Add-ons and an ongoing care plan are available with every scope.

Brysa Limited

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What you will have at launch

A Brysa Salesforce and Slack Quick Start connects the two systems and configures a small number of high-value patterns properly, rather than switching on everything and leaving your team to work out which channels matter.

See records in Slack

Salesforce links expand into readable record previews.

Get the right alerts

Key record events post to the channel that owns them.

Act without switching

Create and update Salesforce records from Slack.

Keep channels tidy

Agreed naming, membership and purpose for each channel.

Move approvals along

Approvers respond in Slack instead of chasing email.

Launch with confidence

Test, train, deploy and support the first weeks of use.

Included in every scope

- Kick-off, discovery and confirmation of the selected package scope
- Salesforce for Slack installed, authenticated and configured against one org and one workspace
- Agreed channel conventions and record preview configuration
- Brysa testing, coordinated client UAT and production deployment
- Administrator and user enablement appropriate to the selected scope
- Remote post-launch hypercare for the stated period and hour allowance
- A defined route into ongoing support through a Brysa Care Plan

STEP 0 · OPTIONAL**Org Health Check**

For organisations with an established Salesforce org or Slack workspace. One week to review current configuration, app installation policy, permissions and channel sprawl, ending in a short findings note and a firm fixed price for the build. The full fee is credited against any Quick Start package started within 60 days.

\$2,000

1 week

Credited on proceed

Choose your scope

Start with the option that reflects the complexity you need now. Capability can be added later through fixed-price add-ons without overloading the initial implementation.

CAPABILITY	SCOPE 1 · LAUNCH	SCOPE 2 · GROWTH	SCOPE 3 · SCALE
Fixed price	\$4,500	\$7,500	\$11,000
Best fit	One team wanting alerts and record access in Slack	Two teams needing approvals and light automation	Several teams needing governance and broader workflow
Guide team size	Around 25 Slack users	Around 75 Slack users	Around 200 Slack users
Salesforce orgs and workspaces	1 org, 1 workspace	1 org, 1 workspace	1 org, 1 workspace
Teams or functional areas	1	Up to 2	Up to 4
Record previews in Slack	Included	Included	Included
Channel conventions	For 1 team	For up to 2 teams	Full governance model
Channel templates	Not included	1 template	Up to 2 templates
Alerts	Up to 2	Up to 5	Up to 8
Action patterns	1	Up to 3	Up to 5
Approval routing	Not included	1 approval process	Up to 2 approval processes
Slack workflows	Not included	Up to 2	Up to 4
Adoption reporting	Not included	2 Salesforce reports	4 reports and 1 dashboard
Governance and handover	Not included	Administration guidance	Governance model and handover guide
Training	Admin and user sessions	Admin, champion and user sessions	Expanded admin and user enablement
UAT	1 cycle	1 cycle plus retest	2 cycles plus regression retest
Hypercare	10 days, up to 3 hours	21 days, up to 6 hours	30 days, up to 8 hours
Typical delivery	2 weeks	3 weeks	4 weeks

All limits are maximums within the fixed-price package and are confirmed in the configuration workbook after discovery.

No data migration in these packages

A Slack Quick Start connects two systems that already hold your data. It does not move records between them, migrate Slack channel history, or clean Salesforce data. Where a migration is needed, it is scoped separately as a CRM Onboarding and Data Migration engagement.

SCOPE 1

Launch

\$4,500

For one team that wants Salesforce records, notifications and a simple action in Slack, without a wider rollout.

Typical delivery: 2 weeks

WORKSTREAM	WHAT BRYSA WILL DELIVER	INCLUDED LIMIT
Discovery and design	— Kick-off and one requirements workshop of up to 2 hours — Confirm the team in scope, the record events that matter and the channels that own them — Configuration workbook and agreed delivery plan	1 team 1 workshop
Connection and access	— Salesforce for Slack installed and authenticated against one org and one workspace — User mapping and permission configuration for the nominated team — Record preview configuration so Salesforce links expand into readable summaries in Slack	1 org 1 workspace
Channel design	— Channel conventions for one team covering naming, purpose, membership and ownership — Set-up of the agreed channels and pinned reference content	1 team Agreed channel set
Alerts	— Up to 2 alerts configured from agreed Salesforce record events to agreed channels — Standard message formatting and destination testing for each alert	2 alerts
Actions	— One action pattern allowing users to create or update one Salesforce record from Slack — Field selection, validation behaviour and confirmation messaging	1 action pattern
Enablement	— One 90-minute administrator session covering configuration and ongoing changes — One 60-minute user session covering day-to-day use — Short written user guide for the agreed patterns	2 sessions
Test and launch	— Brysa testing and one coordinated client UAT cycle — Production enablement and launch checklist	1 UAT cycle
Post-launch support	— Remote support for questions, defects and minor corrections within the agreed scope — Unused hours expire at the end of the support period — Continues seamlessly into a Care Plan where selected	10 days 3 hours

SCOPE 2

Growth

\$7,500

For two teams that need approvals handled in Slack, more alerts and light workflow automation.

Typical delivery: 3 weeks

WORKSTREAM	WHAT BRYSA WILL DELIVER	INCLUDED LIMIT
Discovery and design	— Kick-off and up to 2 requirements workshops totalling 4 hours — Confirm up to 2 teams, the approval process in scope and the workflows to be automated — Configuration workbook, solution summary and delivery plan	2 teams 4 workshop hours
Connection and access	— Everything in Launch, extended to the second team — User mapping, permissions and record preview configuration for both teams	1 org 1 workspace
Channel design	— Channel conventions for up to 2 teams covering naming, purpose, membership and ownership — One channel template — for example an account channel or a deal room — with agreed structure and pinned content	2 teams 1 template
Alerts and actions	— Up to 5 alerts configured from agreed Salesforce record events to agreed channels — Up to 3 action patterns for creating or updating Salesforce records from Slack	5 alerts 3 action patterns
Approvals and workflows	— One existing Salesforce approval process routed to Slack for action — Up to 2 Slack workflows built with standard Workflow Builder steps	1 approval 2 workflows
Adoption reporting	— Configure 2 Salesforce reports covering activity generated through the agreed patterns — One review of the reporting outputs with the nominated owner	2 reports
Test, train and launch	— Brysa testing, one client UAT cycle and one correction and retest period — Production enablement and launch checklist — Administrator, champion and user enablement totalling up to 4 hours	1 UAT cycle 4 training hours
Post-launch support	— Remote support for questions, defects and minor corrections within the agreed scope — Unused hours expire at the end of the support period — Continues seamlessly into a Care Plan where selected	21 days 6 hours

SCOPE 3

Scale

\$11,000

For several teams that need a governed rollout, broader automation and a clear administration handover.

Typical delivery: 4 weeks

WORKSTREAM	WHAT BRYSA WILL DELIVER	INCLUDED LIMIT
Discovery and design	— Kick-off and up to 3 stakeholder workshops totalling 6 hours — Confirm up to 4 teams, approval processes, workflow priorities and the governance model — Acceptance criteria, configuration workbook and delivery plan	4 teams 6 workshop hours
Connection and access	— Everything in Growth, extended across the agreed teams — Permission model, user mapping and record preview configuration reviewed for consistency	1 org 1 workspace
Channel design and governance	— Governance model covering channel naming, purpose, membership, ownership and archiving — Up to 2 channel templates with agreed structure and pinned content — Joiner and leaver guidance for channel membership	4 teams 2 templates
Alerts and actions	— Up to 8 alerts configured from agreed Salesforce record events to agreed channels — Up to 5 action patterns for creating or updating Salesforce records from Slack	8 alerts 5 action patterns
Approvals and workflows	— Up to 2 existing Salesforce approval processes routed to Slack for action — Up to 4 Slack workflows built with standard Workflow Builder steps	2 approvals 4 workflows
Adoption reporting	— Configure 4 Salesforce reports and 1 dashboard covering activity and adoption across the agreed teams — One reporting review with senior stakeholders	4 reports 1 dashboard
Test, train and handover	— Brysa testing and two coordinated client UAT cycles with correction and regression retest — Production enablement, launch checklist and administration handover guide — Up to 6 hours of administrator, champion and user enablement	2 UAT cycles 6 training hours
Post-launch support	— Remote support for questions, defects and minor corrections within the agreed scope — Unused hours expire at the end of the support period — Continues seamlessly into a Care Plan where selected	30 days 8 hours

Add-ons and ongoing care

Most teams need one or two things beyond a standard scope. Rather than moving you up a whole package, these items can be added to any scope at a fixed price and confirmed in the Statement of Work.

Fixed-price add-ons

ADD-ON	FIXED PRICE	TYPICAL EFFECT ON TIMELINE
Additional team or functional area	\$1,900	+2 to 3 days
Additional channel template	\$1,300	+1 to 2 days
Slack Connect set-up for one external partner	\$1,300	+1 to 2 days
Additional approval process routed to Slack	\$1,000	+1 day
Additional Slack workflow	\$1,000	+1 day
Adoption report pack (4 reports, 1 dashboard)	\$1,000	+1 to 2 days
Additional alert	\$700	+0.5 day
Additional action pattern	\$700	+0.5 to 1 day
Additional training session (90 minutes)	\$700	No change

Add-on prices are the same whether agreed at Statement of Work stage or raised during delivery, and are invoiced with the second instalment.

Brysa Care Plans

Slack usage evolves quickly — new channels, new alerts, new teams asking for the same patterns. A Care Plan begins the day hypercare ends, so your administrator has somewhere to go when the next request arrives. For most Slack rollouts we recommend Essentials.

	ESSENTIALS	ACTIVE	PARTNER
Monthly fee	\$750	\$1,600	\$3,000
Included hours	Up to 3 hours	Up to 7 hours	Up to 15 hours
Reactive support	Yes	Yes	Yes, priority
Small changes and fixes	Yes	Yes	Yes
Scheduled change window	Not included	Monthly	Fortnightly
Business review	Not included	Quarterly	Monthly
Roadmap and optimisation input	Not included	Not included	Included
Named Brysa administrator	Not included	Not included	Included

Commit at Statement of Work stage

Where a Care Plan is agreed alongside the Quick Start, Brysa applies a 10% discount to the first six months. Care Plans run on a rolling basis with 30 days' notice, and unused hours do not carry forward.

How the Quick Start is delivered

Brysa uses a structured delivery sequence so decisions are made early, configuration stays within the selected package and your team reaches production quickly.

1	2	3	4	5
Discover	Design	Configure	Validate	Launch
Confirm teams, record events, channels and acceptance criteria.	Agree the configuration workbook and package limits.	Connect, build alerts and actions, and set up channels.	Complete client UAT, corrections, training and readiness checks.	Enable in production and begin the included hypercare period.

Typical timetable

PERIOD	LAUNCH	GROWTH	SCALE
Week 1	Discover, connect and configure	Discover, design and connect	Discovery and governance design
Week 2	UAT, train and launch	Channels, alerts and actions	Connection, channels and templates
Week 3	Hypercare	Approvals, workflows, UAT and launch	Alerts, actions, approvals and workflows
Week 4	Not applicable	Hypercare	UAT, training, handover and launch

When the clock starts

The delivery period begins once the Statement of Work is signed, Salesforce and Slack administrator access is available, permission to install the Salesforce app in your workspace has been granted, the nominated decision-maker is confirmed and the agreed process information has been supplied. Client delays move the delivery dates accordingly.

Decision and feedback cadence

- Brysa records all agreed decisions in the configuration workbook.
- The client provides one consolidated response at each review point.
- Feedback and approvals are expected within two working days unless otherwise agreed.
- New requirements raised during UAT are assessed as additional scope and priced from the add-on menu where applicable.

Definitions and responsibilities

These definitions matter more in a Slack package than almost anywhere else, because words like alert and workflow mean different things to different people. The definitions below keep the fixed price clear for both parties.

TERM	WHAT IT MEANS IN THIS PACKAGE
Alert	One configured notification triggered by one Salesforce record event, delivered to one agreed channel or user using standard message formatting. Multiple destinations for the same event count as one alert; different events count separately.
Action pattern	One configured way for a user to create or update one Salesforce object from Slack, with an agreed field set. A second object, or a materially different field set on the same object, is a second pattern.
Approval routing	Delivery of an existing, working Salesforce approval process into Slack so that approvers can respond there. It does not include designing, rebuilding or extending the approval process itself.
Slack workflow	One automation built using standard Workflow Builder steps within Slack. It does not include custom code, external webhooks or paid third-party workflow connectors.
Channel template	One repeatable channel structure — naming, purpose, membership, pinned content and any linked record — that your team can reuse for a class of channel.
Team or functional area	One group of users with a shared process and a shared set of channels, such as new business sales or customer support.
UAT cycle	One agreed test window using the approved acceptance criteria, followed by correction of in-scope defects and the stated retest period.
Hypercare	Remote questions, defect correction and minor adjustments to the agreed implementation during the stated period and hour allowance.
Care Plan	An ongoing monthly service covering support, small changes and, at higher levels, scheduled change windows and review sessions.

What Brysa needs from you

- Appropriate Salesforce and Slack licences for the users in scope
- Salesforce administrator access and Slack workspace administrator access
- Approval to install the Salesforce app in your Slack workspace, where app installation is restricted
- A nominated decision-maker empowered to approve channel and scope decisions
- Agreement on which channels are in scope and who owns each one
- Named users to carry out UAT and provide one consolidated issue list

What is not included

The following work sits outside all three standard Quick Start scopes unless it is expressly added to the Statement of Work. Where an item is needed, Brysa will scope and price it separately.

- Salesforce, Slack or third-party licences and subscription fees
- Custom Slack applications, bots, bespoke code or external webhooks
- Enterprise Grid design, migration or multi-workspace consolidation
- Slack AI, Slack Sales Elevate or other separately licensed Slack products
- Migration of Slack channel history, messages or files
- Data migration into or out of Salesforce, and any data cleansing
- Redesign of Salesforce processes, approvals or objects to make a pattern possible
- Third-party integrations, middleware or API development
- Apex, Visualforce, Lightning Web Components or other bespoke Salesforce code
- Full change management, ongoing administration or additional UAT cycles

Support, defects and additional requirements

AREA	HOW IT IS HANDLED
Included hypercare	Remote support during UK business hours for questions, agreed-scope defects and minor corrections, limited to the package allowance and period.
Defect	An agreed item does not operate in accordance with the approved configuration workbook or acceptance criteria. Defects are corrected at no additional cost.
Enhancement	A new alert, action, workflow, channel template or other requirement not approved in the package scope.
Additional scope	Brysa will explain the impact and provide a fixed price from the add-on menu or a separate estimate. No chargeable work begins without written approval.
Client delay or pause	Delivery dates move where access, app approval, testing or decisions are delayed. A project paused for more than 20 working days may require re-planning.

Commercial terms and next steps

TERMS	
Fixed package prices	Launch \$4,500 · Growth \$7,500 · Scale \$11,000
Org Health Check	\$2,000, credited in full against any package commenced within 60 days.
Payment	50% on commencement and 50% on UAT sign-off. Add-ons are invoiced with the second instalment.
Care Plans	Billed monthly in advance from the day hypercare ends. Rolling term with 30 days' notice.
Scope confirmation	The selected package and any agreed variations are incorporated into the Statement of Work. The fixed price applies within the stated limits and assumptions.
Acceptance	The client reviews the agreed acceptance criteria during UAT. The solution is accepted when material in-scope defects are resolved, or five working days after production enablement if no material defect has been reported.
Validity	All prices are in US dollars and are the total professional services fee for the agreed scope. Valid for 60 days from the date of issue.

Select the right starting point

Launch

Choose this when one team wants record access and a small number of alerts in Slack.

Growth

Choose this when approvals, workflows, a second team or a channel template are required.

Scale

Choose this when several teams need a governed rollout with broader automation and handover.

Let us confirm the right starting point

Every Quick Start begins with a short, no-obligation suitability call. It takes about thirty minutes and confirms three things: which scope fits your teams, whether your Salesforce org or Slack workspace needs an Org Health Check first, and what we would each need to have ready before the clock starts.

Next step

Brysa will hold a short suitability call to confirm the selected package, your Salesforce and Slack environments and the prerequisites. We will then issue the Statement of Work and agree the kick-off date.

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This document describes Brysa's standard Salesforce and Slack Quick Start packages. The signed Statement of Work governs the engagement.