Pure Storage

Sales Ops Technical Sales Automation (TSA) Framework

SoW / Effort Template

PURE STORAGE

Description of Project

1. Pure is requesting a requirements gathering and design project for the Technical Sales Automation (TSA) SaaS portal that is powered by a secure, modular framework that can evolve with our sales motion as we expand our product and service portfolio. This framework's purpose is to:
    1. Automate manually intensive tasks that are part of the sales motions
    2. Provide consumable information to the sales team (Pure and Partners) to shorten the sales cycle
    3. Bring innovation and evolve our sales motion to be more intelligent and predictive
    4. Provide an interface to is easy to use with a great user expereince

    This scope of work will help define and fine tune the requirements discussed during our technical discussion around:
    1. A containerized SaaS based framework with a modular framework based on micro services
    2. Framework to manage data ingestion, manipulation, and output (via API)
    3. Framework with an analytics and data processing engine
    4. Framework with a flexible and modular UI & visualization engine
    5. Framework with the ability dynamically scale itself based on usage and workload

    The deliverable of the project will aid in understanding the potential cost, resources, and duration of the TSA project.

Detailed Description of Project

Requirements gathering for:

1. Infrastructure required for the TSA framework with multi-tenant support as well as dark-sites
2. SSO (User and Partner Management via integration via Sales Force)
3. Data Discovery & Management
    1. UI / User Modules
        1. API Manager
        2. Data Collector and File Manager
        3. Data Scheduler
    2. Business Logic
        1. Define Data Aggregator
        2. Define Data Importer
        3. Define Real-time data stream and feed
        4. Define Data logger
        5. Define Data Parser (repository)
        6. Define Data retention and archive methods/approach

Detailed Description of Project

Requirements gathering for:

1. Data Analytics & Data Processing Engine
    1. UI / User Modules
        1. Data Source Definition Repository
        2. Meta Data Manager
        3. Data Source Lookup
        4. Platform Settings
        5. Operational Simulation / Model Builder
        6. Data Source Mapper / Modeler
        7. Workload Builder (for sizing)
    2. Data Model (Analysis)
        1. Define meta data to drive application
        2. Define meta data to drive UI (for UI rendering engine?)
        3. Define standard naming convention
        4. Finalize on database technology types for capacity and performance data needs
        5. Define Security model / encryption ?
    3. Business Logic
        1. Define Analytics Repository
        2. Define Recommendation Engine
        3. Define TSA API Service
        4. Define Performance Profiler* need to understand feasibility as this is data collection dependent
        5. Define Data erichment, normalization, and transformation
        6. Define Data tracking
        7. Define SQL (tables, stored procedure and views)

Detailed Description of Project

Requirements gathering for:

1. UI & Visualization Engine
    1. UI / User Modules
        1. Dashboard
        2. Report Manager
        3. Report Creator
        4. Template Manager
        5. API Data Output Builder
        6. Partner / Customer Entitlements
    2. Business Logic
        1. Define Reporting & Chart Repository
        2. Define UI Builder
        3. Define UI Rendering Engine (based off of meta data output from data model)
2. Application Logging & Error Handling
3. Code Build & Release and QA/regression process and automation
4. Self-Healing
    1. Intelligence in how TSA deals with data quality and data integrity
    2. Self-monitor of bottlenecked services to scale

Technology recommendation (software packages, coding, testing, bug tracking etc…)
Resource planning and time estimation to execute on the requirements for the feature and function described below
Project Plan
Test Plan - support matrix and execution plan of test cycles to cover functional, scalability and performance testing

Scope

Execution Approach

Resource Requirements

Timeline and Deliverables

Milestone	Deliverable	Duration (Weeks)	Deliverables

Engineering Estimates

Cost & Effort Estimates			
Item	**Engagement Model**	**Duration (Weeks)**	**Amount (USD)**
Requirements Gathering, Design, Development, Testing & Documentation	Fixed Price		
Post Delivery Support	On Demand T&M		

Assumptions and Constraints

XX – Project Management – Approach

What	Representation	Purpose	Frequency	Method(s)
Kick-off Meeting	All stakeholders (Pure Storage,)	- Gather information for Initial Project - Confirm Team - Review Initially proposed plans - Identify change control processes and timelines	FIRST	On Site / Face to Face Meeting
Distribute Project Plan	All stakeholders (Pure Storage,)	- Compile the final Architecture Design - Coordinate ongoing resources - Distribute project scope and plan to team - Review configuration documentation and rollout schedule with the team	Before Implementation begins	Meeting / Conference Calls
Tasks Rollout	All stakeholders (Pure Storage,)	- Weekly Communication re: plans/roles/responsibilities - Identify tasks completed, outstanding items and blocking factors - escalate if required	During implementation, configuration and migration	Meeting / Conference calls
Status Reports – including final hand off" Document	All Stakeholders (Pure Storage,)	- Progress updates - Raise issues, Concerns, Scope Creep - High level monthly updates with exec sponsor. - Exception list, escalation list. - To keep escalation going.	Regularly scheduled weekly (bi-weekly) for the duration of the engagement	Meeting / Update Notes distributed via email

Next Steps

General Housekeeping

- Request for access
- Joint repository for ongoing working docs
- Identify Team for each project
- PM / Team meetings and status reports
- Resource Coordination
- Frequency and format of updates – compare to plan
- Escalation Paths clearly defined

- Executive / Steering Committee Updates
  - Milestone/Phase Updates
  - Financial and feasibility tracking
    - Setup regular cadence

TAS Project

- Pre-site Visit
- Kick off Meeting
- Discovery workshops
- Discovery Documentation
- Publish Proposal and initiate work schedule

Sample API Data Ingest & Dashboard

- Data collection samples
- Data parse and automation feasibility analysis

Thank You

Q & A

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Scoping Content

TSA – Functional Consideration