

Scope of Work: Lineup - Bulk Interview Management System

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Executive Summary

This Scope of Work (SoW) defines the requirements, deliverables, and timeline for developing **Lineup**, a standalone bulk interview management system designed to integrate with multiple CRM and ATS platforms. Currently built on Zoho Creator, Lineup will be rebuilt as an independent, proprietary SaaS product owned and controlled by Mintskill. This transition establishes ownership of the intellectual property, enables multi-tenant architecture, supports integrations with diverse platforms, and creates a scalable product for future commercial distribution.

The project transforms Lineup from a client-specific implementation to a market-ready SaaS product capable of supporting enterprise-level interview management, candidate communication, and CRM/ATS ecosystem integration.

1. Business Overview

1.1 Current State Analysis

Existing Implementation:

- Developed on Zoho Creator platform
- Dependent on Zoho infrastructure and licensing terms
- Limited integration capabilities beyond Zoho ecosystem
- Single-tenant architecture tied to implementation environment
- Difficult to scale or commercialize independently
- Features constrained by Zoho Creator limitations and no-code platform boundaries

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Business Challenge:

- Lacks strategic ownership of core product
- Cannot establish independent pricing or licensing model
- Cannot integrate external systems (non-Zoho CRMs/ATS platforms)
- Constraints on customization and feature innovation
- Difficulty in positioning as proprietary SaaS offering to market

1.2 Strategic Vision

Target State:

- Fully owned, proprietary SaaS application built on modern web stack
- Independent deployment, scalability, and control
- Multi-tenant architecture supporting multiple clients simultaneously
- Flexible integration ecosystem (Zoho, Salesforce, HubSpot, Workday, Lever, Greenhouse, BambooHR, jobitus, phenompeople.com, darwinbox, workable, iSmartRecruit, etc.)
- Commercial product ready for market positioning and sale
- Enterprise-grade performance, security, and reliability
- Separate version for Staffing companies and corporates (Corporate version will have vendor licenses)

2. Project Objectives

2.1 Primary Objectives

1. **Establish IP Ownership** - Create fully owned application with no dependency on third-party platforms. Source code, architecture, and product roadmap remain exclusively controlled by Mintskill.
2. **Build Multi-Tenant Architecture** - Design system to support multiple independent client environments with data isolation, role-based access control, and tenant-specific customization.
3. **Implement Enterprise Integration Framework** - Create unified integration layer supporting major CRM and ATS platforms, enabling seamless data synchronization and workflow automation.
4. **Achieve SaaS Readiness** - Deploy with security standards, compliance frameworks, scalability, performance monitoring, backup/disaster recovery, and uptime guarantees suitable for commercial SaaS offerings.
5. **Create Market-Ready Product** - Develop commercial positioning, licensing model, pricing strategy, onboarding workflows, support documentation, and API for third-party integrations.

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2.2 Secondary Objectives

- Migrate existing functionality while improving user experience and performance
 - Establish technical foundation for future feature expansion
 - Implement admin dashboard for tenant management and reporting
 - Create comprehensive API for custom integrations
 - Establish metrics for product performance, reliability, and adoption
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3. Scope of Work

3.1 In Scope

A. Core Application Development

Interview Management Module

- Interview scheduling and calendar management
- Interview workflow automation (requisition → interview → feedback → offer)
- Multi-stage interview pipeline with customizable stages
- Interview feedback collection and rating system
- Bulk interview operations (bulk scheduling, bulk status updates, bulk communications)
- Interview documentation and candidate scorecards
- Notification and reminder systems (email, SMS, webhook-based)

Candidate Management Module

- Resume parser to add candidate profiles in bulk through spreadsheet and resume
- Candidate profile creation and management
- Candidate search and filtering
- Interview history and interaction timeline
- Document uploads (resumes, portfolios, assessments)
- Candidate communication (email, in-app messaging, SMS, WhatsApp)
- Candidate status tracking across interview stages

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CRM/ATS Integration Framework

- Salesforce integration (lead/contact sync, opportunity mapping)
- HubSpot integration (contact/deal management)
- Zoho CRM integration (lead/contact/deal sync, advanced custom field mapping)
- Workday integration (requisition pull, candidate data sync)
- Lever integration (job posting sync, candidate data push/pull)
- Greenhouse integration (job requisition sync, feedback data sync)
- BambooHR integration (employee record creation, offer acceptance workflows)
- Custom API endpoints for client-specific integrations
- Webhook support for real-time data synchronization
- Two-way data sync with conflict resolution and audit trails

User Management & Access Control

- Multi-tenant user management with role-based access control (RBAC)
- Administrative users, recruiter/hiring manager roles, candidate portal access
- Team management and hierarchical permissions
- Single sign-on (SSO) support (SAML 2.0, OAuth 2.0)
- Two-factor authentication (2FA) for enhanced security
- Activity audit logs and compliance tracking

Admin Dashboard

- Tenant management (creation, configuration, customization)
- User management and permission assignment
- Integration status and health monitoring
- System metrics and analytics dashboard
- Billing and usage analytics
- Support ticket system integration

Reporting & Analytics Module

- Pre-built reports (interview funnel, time-to-hire, offer acceptance rates, source attribution)
- Custom report builder
- Dashboard with KPI visualization
- Export functionality (PDF, CSV, Excel)
- Scheduled report delivery via email
- Interview feedback analytics and hiring insights

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Data Migration

- Migration from Zoho Creator implementation to new platform
- Data validation and integrity checks
- User training and transition support
- Rollback procedures and data backup verification

B. Technical Infrastructure

Technology Stack Selection

- Backend framework selection (recommended: Node.js/Express, Python/Django, or Java/Spring)
- Frontend framework (React, Vue.js, or similar modern SPA framework)
- Database selection (PostgreSQL recommended for ACID compliance, relational integrity, and enterprise support)
- Message queue system for async operations (RabbitMQ, Apache Kafka)
- Caching layer (Redis)
- API gateway and rate limiting

Multi-Tenant Architecture

- Database-per-tenant or row-level multi-tenancy design
- Data isolation and security controls
- Tenant-specific configurations and customizations
- Scalable deployment strategy (containerization, orchestration)

Security Implementation

- Data encryption at rest and in transit (TLS/SSL)
- OWASP Top 10 vulnerability mitigation
- Role-based access control (RBAC) implementation
- API authentication and authorization (API keys, OAuth)
- Secrets management and credential rotation
- Regular security audits and penetration testing
- GDPR and data privacy compliance measures

DevOps & Infrastructure

- CI/CD pipeline setup (automated testing, build, deployment)
- Docker containerization for consistent environments
- Kubernetes orchestration for scalability and high availability
- Cloud infrastructure (AWS, GCP, or Azure) with multi-region capability

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- Load balancing and auto-scaling
- Monitoring, logging, and alerting systems (ELK stack or equivalent)
- Backup and disaster recovery procedures
- Database replication and failover strategies

API Development

- RESTful API design with comprehensive documentation
- OpenAPI/Swagger specification
- Rate limiting and quota management
- Webhook support for event-driven integrations
- SDK development for common programming languages

C. Integration Connectors

Salesforce Integration

- Lead and Contact data synchronization
- Opportunity and sales stage mapping to interview pipeline
- Custom field mapping
- Real-time bidirectional sync
- Error handling and retry logic

HubSpot Integration

- Contact and Deal management
- Pipeline mapping
- Custom properties sync
- Activity logging and timeline integration

Zoho CRM Integration

- Lead, Contact, and Deal synchronization
- Advanced custom field mapping
- Multi-record linking
- API-based sync with fallback mechanisms

ATS Platform Integrations

- Workday Recruiting integration (requisition data pull, candidate profile creation)
- Lever integration (job posting sync, feedback data synchronization)
- Greenhouse integration (job requisition data, candidate feedback flow)
- Ashby integration (job and candidate data)
- Support for additional ATS platforms based on client requests

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HR & Onboarding Systems

- BambooHR integration (employee record creation, offer workflows)
- Guidepoint integration for background check automation

Communication Integrations

- Email integration (Gmail, Outlook via IMAP/SMTP)
- SMS provider integration (Twilio, AWS SNS)
- Slack webhook support for notifications
- Microsoft Teams webhook support
- Whatsapp integration

Custom Integration Framework

- Generic webhook receiver for any third-party system
- Custom field mapping configuration UI
- Data transformation and validation rules
- Error logging and monitoring

D. Front-End & User Experience

Interview Management Dashboard

- Overview of scheduled interviews, completion status, feedback pending
- Calendar view with interview scheduling
- Pipeline visualization (candidates by stage)
- Quick actions for bulk operations

Candidate Portal

- Interview confirmation and rescheduling
- Pre-interview information and instructions
- Interview feedback submission
- Offer acceptance/rejection workflow

Admin Console

- Tenant configuration and customization
- User management and permissions
- Integration setup and monitoring
- System settings and preferences

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Responsive Design

- Mobile-optimized interface for recruiters and candidates
- Cross-browser compatibility
- Accessibility compliance (WCAG 2.1 AA)

E. Documentation & Knowledge Base

Technical Documentation

- API reference and integration guides
- Architecture documentation and system design
- Database schema documentation
- Deployment and operations manual

User Documentation

- Administrator guide (tenant setup, configuration, user management)
- Recruiter/hiring manager guide (interview scheduling, feedback, candidate management)
- Candidate portal guide
- Integration setup guides for each CRM/ATS platform

Developer Documentation

- SDK documentation for common languages
- Webhook event reference
- Custom integration examples and code samples
- API authentication and authorization guide

3.2 Out of Scope

The following items are explicitly excluded from this Scope of Work and may be addressed in future phases:

- Mobile native applications (iOS/Android) - web application responsive design will be provided
- Video interviewing platform - integration with existing platforms (BrightHire, HireVue, Behavioural, etc.) can be added in Phase 2
- Artificial Intelligence features (resume screening, candidate ranking, bias detection) - AI integration roadmap in Phase 2
- Predictive analytics and machine learning models - initial release uses business rule-based logic
- Support for legacy ATS systems (legacy Taleo, legacy SuccessFactors) - modern API-based systems only
- White-label implementation for resellers - licensing model to be defined
- 24/7 enterprise support tier - support model to be defined during commercialization
- Custom development for individual clients during initial SaaS launch

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- Compliance certifications beyond GDPR (SOC 2, HIPAA, etc.) - roadmap for Phase 2
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4. Deliverables

4.1 Phase 1: Foundation & Core Development

Deliverable 1.1: Project Charter and Technical Architecture Document

- Project governance, roles, and responsibilities
- Detailed technical architecture diagrams
- Technology stack selection and rationale
- Multi-tenant design specification
- Deployment architecture

Deliverable 1.2: Core Application Build

- Interview management system (scheduling, pipeline, feedback)
- Candidate management system
- User management and role-based access control
- Admin dashboard foundation
- Database schema and data models

Deliverable 1.3: Zoho CRM Integration Connector

- Zoho CRM lead/contact sync
- Custom field mapping engine
- Real-time bidirectional synchronization
- Error handling and retry mechanisms
- Integration monitoring dashboard

Deliverable 1.4: Authentication & Security Framework

- SSO implementation (SAML, OAuth)
- API key and token-based authentication
- Encryption implementation (at rest and in transit)
- Security audit report

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Deliverable 1.5: Deployment Infrastructure

- Docker containerization
- Kubernetes deployment configurations
- CI/CD pipeline setup
- Monitoring and logging infrastructure

Deliverable 1.6: Data Migration Tooling

- Migration scripts from Zoho Creator
- Data validation and verification procedures
- Rollback and recovery procedures
- Migration documentation and runbook

4.2 Phase 2: Integration Ecosystem

Deliverable 2.1: Salesforce Integration Connector

- Lead and Contact synchronization
- Opportunity mapping to interview pipeline
- Real-time sync and event-driven triggers
- Custom field mapping

Deliverable 2.2: ATS Platform Integrations

- Workday Recruiting connector
- Lever connector
- Greenhouse connector
- Each includes requisition sync, candidate data flow, and feedback synchronization

Deliverable 2.3: Communication Integrations

- Email integration and templating
- SMS integration via Twilio
- Slack notification support
- Webhook-based event notifications

Deliverable 2.4: Reporting & Analytics Module

- Pre-built report templates
- Custom report builder
- Dashboard and visualization components
- Export functionality

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Deliverable 2.5: Admin Console

- Tenant management interface
- Integration status monitoring
- System metrics and health dashboard
- Billing and usage tracking

4.3 Phase 3: SaaS Hardening & Commercialization

Deliverable 3.1: SaaS Operations Manual

- Operations runbook and procedures
- Incident response and escalation procedures
- Performance tuning guidelines
- Backup and disaster recovery procedures
- Upgrade and maintenance procedures

Deliverable 3.2: Commercial Product Package

- Pricing and licensing model documentation
- Terms of service and privacy policy
- SLA documentation
- Support tier definitions

Deliverable 3.3: Marketing Collateral

- Product overview and feature documentation
- Case studies and success metrics
- Integration partner showcase
- Competitive positioning documentation

Deliverable 3.4: Onboarding & Self-Service

- Interactive product demo and tutorial
- Self-service knowledge base
- Client onboarding workflow automation
- API documentation and developer portal

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5. Project Timeline

5.1 Phase Timeline

Phase 1: Foundation & Core Development

Duration: 4-5 months
Target Completion: March 2026

- Weeks 1-3: Architecture finalization, technology stack setup, team allocation
- Weeks 4-8: Core application development (interview management, candidate management)
- Weeks 9-12: User management, RBAC, authentication framework
- Weeks 13-16: Zoho CRM integration, testing, and QA
- Weeks 17-20: Deployment infrastructure, data migration, UAT

Phase 2: Integration Ecosystem

Duration: 3-4 months
Target Completion: July 2026

- Weeks 1-4: Salesforce and ATS connectors development
- Weeks 5-8: Communication integrations and reporting module
- Weeks 9-10: Admin console and tenant management
- Weeks 11-12: Integration testing and documentation
- Weeks 13-16: Performance optimization and security hardening

Phase 3: SaaS Hardening & Launch Preparation

Duration: 2-3 months
Target Completion: September 2026

- Weeks 1-4: Operations procedures, SLA documentation, support model finalization
- Weeks 5-8: Marketing collateral, onboarding automation, documentation completion
- Weeks 9-10: Beta testing with select clients, feedback incorporation
- Weeks 11-12: Final security audit, penetration testing, compliance certification

5.2 Key Milestones

Milestone	Target Date	Deliverables
Architecture Approved	Dec 2025	Technical design document, team kickoff
MVP Launch (Internal)	Feb 2026	Core features, Zoho integration working
Phase 1 Complete	Mar 2026	Full core system, Zoho integration, deployment ready
Multi-Integration Support	Jun 2026	Salesforce, ATS platforms, reporting
Beta Launch	Aug 2026	Feature complete, documentation, select client testing
General Availability (GA)	Sep 2026	Production-ready, SaaS tier available for sale

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6. Resource Requirements

6.1 Development Team

Responsibility of Trainees
System design, technology decisions, integration architecture
Backend system development, API design, integrations
Feature development, integration connectors, API endpoints
UI/UX implementation, responsive design, user experience
Component development, dashboard features, portal development
Infrastructure, CI/CD pipeline, monitoring, security
Test planning, test automation, quality standards
Manual testing, test case creation, bug tracking
Product roadmap, requirement gathering, stakeholder management
Process documentation, migration planning, user requirements

6.2 Infrastructure & Tools

- Cloud infrastructure (AWS/GCP/Azure) – to be provided during development, scaled based on traffic post-launch
- Development tools (IDE, version control, CI/CD) - GitHub, JetBrains licenses
- Communication and project management - Slack, Jira/Asana
- Security and compliance tools - SonarQube, Snyk for vulnerability scanning
- Monitoring and observability - DataDog, New Relic, or ELK stack

6.3 External Dependencies

- Third-party API access and sandbox accounts (Salesforce, Zoho, HubSpot, Workday, Lever, Greenhouse)
- Integration testing environments
- Security audit and penetration testing services
- Legal review for Terms of Service, Privacy Policy, SLA

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7. Technical Specifications Overview

7.1 System Architecture (High Level)

API Layer

- RESTful API providing all core functionality
- OpenAPI/Swagger specification for documentation
- Rate limiting and quota management per tenant

Application Layer

- Modern SPA (Single Page Application) frontend
- Server-side rendering for performance optimization
- Mobile-responsive design

Integration Layer

- Generic webhook receiver for external systems
- Scheduled sync jobs for batch integrations
- Event-driven architecture for real-time updates
- Transformation and validation engine

Data Layer

- Multi-tenant database with row-level security
- Data isolation and encryption
- Audit trail and compliance logging

Infrastructure Layer

- Containerized deployment (Docker)
- Orchestration (Kubernetes)
- Load balancing and auto-scaling
- CDN for static assets

7.2 Security Standards

- Data encryption: TLS 1.2+ for transport, AES-256 for storage
- Authentication: OAuth 2.0, SAML 2.0 for SSO, API keys for integrations
- Authorization: Role-based access control (RBAC) and attribute-based access control (ABAC)
- Compliance: GDPR, data residency requirements, audit logging
- Security testing: Annual penetration testing, vulnerability scanning, code review

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7.3 Performance Targets

- API response time: <200ms for 95th percentile
 - Page load time: <2 seconds for 95th percentile
 - System uptime: 99.5% SLA
 - Database query time: <100ms for 95th percentile
 - Concurrent user support: 5,000+ concurrent users with <5% degradation
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8. Assumptions & Constraints

8.1 Assumptions

- Stakeholder availability for requirements gathering and decision-making
- Stable requirements during Phase 1; minor iterations expected in Phases 2-3
- Access to all necessary third-party API documentation and sandbox environments
- Sufficient budget allocation for infrastructure, tools, and resources
- Acceptance of recommended technology stack or documented trade-offs for alternatives
- Client base will provide feedback and pilot participation for beta testing

8.2 Constraints

- Initial ATS integrations limited to modern API-based systems (legacy system support post-launch)
- SaaS launch requires production-grade infrastructure (estimated \$50,000-100,000 upfront investment)
- Multi-region deployment deferred to Phase 2 (single region for initial launch)
- Advanced AI/ML features require additional research and budget allocation
- Video interviewing initially via third-party integration rather than native feature
- Support model and pricing strategy require separate business review and approval

8.3 Dependencies

External:

- Third-party API availability and stability
- Cloud provider availability and performance
- Client data and business process documentation
- Regulatory compliance framework confirmation

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Internal:

- Approval of technology stack and architecture
- Allocation of development resources
- Access to existing Zoho Creator implementation
- Product vision and market positioning approval

9. Success Criteria & KPIs

9.1 Project Success Metrics

Metric	Target	Measurement
Scope Completion	100%	Deliverables checklist completion
Timeline Adherence	±2 weeks	Milestone achievement dates
Quality	<10 critical bugs at GA	Bug tracking and QA reports
Test Coverage	>80%	Code coverage reports
Performance	Meet targets	Load testing and monitoring data
Security	0 critical vulnerabilities	Security audit findings

9.2 Product Success Metrics (Post-Launch)

Metric	Target	Timeline
System Uptime	99.5%	Ongoing monitoring
Mean Time to Resolution (MTTR)	<2 hours for P1 issues	After first 3 months
Customer Satisfaction	>4.0/5.0	Quarterly reviews
Integration Success Rate	>98%	Monthly reporting
Platform Adoption	5+ customer tenants	First 6 months post-launch

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10. Risk Management

10.1 Identified Risks

Risk	Probability	Impact	Mitigation
Integration complexity with multiple CRM/ATS platforms	Medium	High	Create integration reference architecture early; use standardized data models
Multi-tenancy data isolation issues	Medium	Critical	Comprehensive security design review; early security audits; penetration testing
Resource availability/team scaling	Medium	High	Phased hiring; cross-training; documentation focus
Third-party API changes or deprecation	Low	Medium	API abstraction layer; integration deprecation monitoring
Performance issues at scale	Medium	High	Load testing early and often; performance optimization sprints; capacity planning
Scope creep and feature requests	High	Medium	Strict change management; feature prioritization for roadmap; clear scope boundaries

10.2 Risk Mitigation Strategies

- Weekly risk review in project standups
- Architecture review gates before each phase
- Early security and performance testing
- Vendor relationship management for third-party APIs
- Clear change management process and feature prioritization
- Regular stakeholder communication on status and constraints

11. Commercialization Strategy

11.1 Product Positioning

Target Market: Mid-market and enterprise organizations with 50-5,000 employees requiring bulk interview management with CRM/ATS integration.

Key Value Propositions:

- Unified interview management across any CRM or ATS
- Significant time savings through bulk operations and automation
- Eliminates data silos between recruitment and sales teams
- Enterprise-grade security and compliance
- Flexible integration ecosystem

11.2 Pricing Model (to be finalized)

Proposed Structure:

- Seat-based pricing (per recruiter/hiring manager)
- Usage-based pricing (per interview scheduled)
- Tiered feature set (Standard, Professional, Enterprise)
- Integration fee structure (if applicable)
- Setup and data migration fees

11.3 Go-to-Market Plan (to be developed separately)

- Target customer profile definition
 - Sales process and customer acquisition strategy
 - Marketing and positioning campaign
 - Partner integration strategy and marketing
 - Customer success and retention program
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12. Future Roadmap (Beyond Phase 3)

12.1 Phase 4: Advanced Features

- AI-powered candidate insights and recommendations
- Video interviewing platform integration and recording
- Advanced scheduling and calendar management
- Candidate communication chatbot
- Predictive hiring analytics

12.2 Phase 5: Ecosystem Expansion

- White-label offering for consulting partners
- Mobile native applications (iOS/Android)
- Additional CRM platforms (Oracle, Microsoft Dynamics)
- Advanced HR integrations (payroll, benefits, HRIS)
- Marketplace for third-party extensions

12.3 Phase 6: Enterprise Features

- SOC 2 Type II certification
- Multi-region deployment and data residency
- Advanced compliance (HIPAA, FINRA, industry-specific)
- Custom SLA and enterprise support tiers
- Dedicated infrastructure options

13. Governance & Decision-Making

13.1 Project Steering Committee

- Mintskill Leadership (Executive Sponsor)
- Product Owner
- Technical Architect
- Finance and Business Lead

Cadence: Bi-weekly steering committee meetings

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13.2 Change Management

All scope changes must go through formal change request process:

1. Submit change request with business justification
2. Review by Product Owner and Technical Architect
3. Impact assessment (timeline, resources, budget)
4. Steering committee approval
5. Implementation scheduling

13.3 Communication Plan

- Daily: Development team standups
 - Weekly: Steering committee update
 - Bi-weekly: Stakeholder demos and feedback
 - Monthly: Executive status report
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