**A black and red logo

Description automatically generatedTTEC DIGITAL STATEMENT OF WORK**

This Statement of Work (“SOW”), by and between (“TTEC”) and W. L. Gore & Associates (“Client”) is entered into as of the date of the last signature below, the “SOW Effective Date”, pursuant to and governed by the terms of a certain Choose an item. (the Agreement) dated effective . In the event of a conflict between SOW and the Agreement, this SOW shall govern and control to the extent of such conflict. Terms not otherwise defined herein shall have the meaning given to them in the Agreement.

# Project Description

W. L. Gore is currently on Salesforce CDP and want to move to Microsoft Customer Insights. Gore is also looking to move away from Salesforce for marketing and into the Dynamics 365 Marketing system.

# Scope

## Initiate and Define

TTEC is responsible for the following:

|  |
| --- |
| **Project Setup**  Project Manager project initiation and setup |
| **Internal Kickoff**  Internal handover from sales to delivery |
| **Client Kickoff**  Project kickoff with client.  Remote session with all participants. |
| **Marketing Discovery and Design**  Requirements gathering to review priority use cases identified by the customer for discovery. TTEC resources will review necessary requirements and documents provided by Customer to develop implementation tasks (use cases).  Sessions to focus on requirements for the following focus areas:   * + Segmentation   + Customer Journey Requirements   + Marketing Email Templates   + Subscription Management   + Landing Page / Marketing Pages   + Lead Scoring / Lead Pipeline Requirements   Facilitate up to 6 (2 hour) Sessions with 2 TTEC Consultants for each focus area. Includes time for preparation. Sessions to be conducted remotely and to be used to review internal documentation and create use cases for implementation task user stories. |
| **Marketing Functional Requirements Documentation**  Documentation of use cases identified and functional business requirements document based on requirements session prioritized use cases   * This documentation will include as is and to be documentation of the current and future state. Timeboxed at 8 hours. |
| **Marketing Technical Requirements Review**  Sessions dedicated to reviewing data set, existing legacy technology and determining approach for:   * + Data migration   + System architecture design   Timeboxed to 3 (2 hour) sessions with 2 Consultants. |
| **Marketing Technical Requirements Documentation**  Documentation of proposed data migration plan and system architecture design overview (diagram) |
| **Marketing Technical Requirements Document Internal Review**  The Solution Architect will review the documentation prior to delivery to the client.  Timeboxed to 4 hours. |
| **Marketing Functional and Technical Document Client Review**  The functional and technical documentation will be reviewed with the client and make any final changes before they are signed-off by the Client.  Timeboxed to 8 hours with 2 TTEC Digital consultants. |
| **Customer Insights Discovery and Design**  Requirements gathering to review priority use cases identified by the customer for discovery. A review necessary requirements and documents provided by the client to develop implementation tasks (use cases). Sessions to focus on requirements for the following focus areas:   * + Definitions of business rules, technical use cases   + Define logic for all sources of data to be ingested by Customer Insights including API and Data Mapping for each source   + Define technical design, lifecycles, samples for sandbox, and go-live release plan   + Identify and test connectivity methods, system accounts, data flow security requirements   + Timeboxed to 5 hours per meeting for four (4) discovery and design sessions for each of the lead personnel.   The Client will ensure the appropriate subject matter experts are available to participate in all meetings. |
| **Customer Insights Design Documented**   * Documented outcome of the Customer Insights Discovery and Design session including; * Definitions of business rules, technical use cases * Document logic for all sources of data to be ingested by Customer Insights including API and Data Mapping for each source. * Document technical design, lifecycles, samples for sandbox, and go-live release plan. * Document an Entity Relationship Diagram (ERD) of relationships between entities, and the architecture of the environment * Document map, match and merge logic used for profile unification * This documentation will include as is and to be documentation of the current and future state   Timeboxed to 6 hours per subject for 6 documents. |
| **Customer Insights Design Document Internal Review**  The Solution Architect will review the documentation prior to deliver to the client  Timeboxed to 4 hours. |
| **Customer Insights Design Document Client Review**  The functional and technical documentation will be reviewed with the client and make any final changes before they are signed-off by the Client.  Timeboxed to 8 hours with 2 TTEC Digital consultants. |
| **Transition for GDC Resource(s)**  The Senior Consultants will meet with the GDC Resources prior to begin the Build phase.  Timeboxed to 4 hours for each assigned person. |
| Build TTEC is responsible for the following: |
| **Unit Testing and Bi-Weekly Demos**  TTEC will Unit Test the solution during the implementation  As part of this Unit testing, TTEC will demo progress every two weeks to the Gore team |
| **Consultant onboarding and environment access**  Consultant onboarding and environment access validation.  Timeboxed to 4 hours for each assigned person. |
| **Marketing Solution Architect Oversight**  Principal Solutions Architect Oversight during Build.  Timeboxed to 8 hours per week for 8 weeks. |
| **Marketing Content Blocks for Header and Footer**  Configuration of Content Blocks for Header and Footer.  Timeboxed to 8 hours. |
| **Marketing Email Templates**  Configuration of up to 20 Email Templates based on current Salesforce templates. These templates will be exact copies of what exists in Salesforce, and the templates are ready to be moved.  Timeboxed to 48 hours for each of the 20 templates. |
| **Marketing Emails**  Configuration of up to 18 Marketing Emails (3 for each Business Unit) based on current Salesforce Marketing Emails.  Timeboxed to 2 hours for each of the 18 templates. |
| **Marketing Landing Pages**  Build out of 3 landing pages.  Configuration of Landing Pages will utilize native templates and content blocks.  Timeboxed to 4 hours for each of the 3 landing pages. |
| **Marketing Journeys (Salesforce)**  Configuration of up to 12 Marketing Journeys based on existing journeys from Salesforce.  No Custom activities will be used for Segment Based Journeys.  Timeboxed to 4 hours for each of the 12 Marketing Journeys. |
| **Marketing Segment based Journeys**  Configuration of up to 1 new Marketing Journey with the Gore team based on segments for Gore training purposes.  No Custom activities will be used for Segment Based Journeys.  Timeboxed to 8 hours. |
| **Marketing Trigger based Journeys**  Configuration of a single Trigger-Based Journey.  Timeboxed to 12 hours for the single Trigger Based Journey. |
| **Marketing Subscription Management**  Configuration of native subscription management from D365 Marketing.  Timeboxed to 8 hours. |
| **Marketing Lead Scoring**  Configuration of lead scoring engagement.  Timeboxed to 18 hours. |
| **Marketing Consent Management**  Configure Consent Management Feature Configuration, and Configuration of 1 Subscription List.  Timeboxed to 16 hours. |
| **Marketing Data Migration**  TTEC resources will work with the customer team to migrate Accounts, Leads and Contacts into the new Dynamics Marketing system  The migration will use native Power Platform import functionality using CSV files  Each table of data is timeboxed to 40 hours |
| **Marketing Security Roles and Access Control**  Creation of two tiers of security access for each team.  Configuration of 6 Business Units  General user (1) and admin role (1) for Marketing Model Driven App.  General user role limited to specific forms and fields, with admin role having complete access.  Timeboxed to 80 hours. |
| **Marketing Reporting**  Creation of a single Native D365 reporting dashboard for Marketing Campaigns using out-of-the-box analytics.  No custom reports or dashboards.  This is for operational purposes, not for metric related data for campaign performance.  Timeboxed to 12 hours. |
| **Marketing Trigger Configuration**  Creation of 1 trigger for the trigger Journey  Timeboxed to 8 hours |
| **Marketing Suppression Lists**  Creation of up to 4 suppression lists  Timeboxed to 8 hours |
| **Customer Insights Solution Architect Oversight**  A Customer Insights Solution Architect will provide oversight for the "Build" phase of the project.  Timeboxed to 8 hours per week for 8 weeks. |
| **Customer Insights environments Provisioned**  Work with the Clients IT Team to follow the Microsoft Prescriptive Guidance for provisioning the Dynamics 365 Customer Insights.  Provide the instructions document from Microsoft.  Setup a TEAMS call and walk through the steps (if required)  Once the tenant is provisioned, we will validate that it is provisioned correctly.  Customer Insights is a Batch ingestion system. Connections can be scheduled to refresh as frequently as every 4 hours  Timeboxed to 8 hours. |
| **Customer Insights Customer data ingested**  5 Source/Entities of Customer data   * + Salesforce CRM Contacts, Accounts, Leads, Users, Account Technology (Timeboxed 8 hours for each table for 40 hours)   + Dynamics Marketing Contacts (Timeboxed 40 hours)   + Ping Profiles (Timeboxed 40 hours)   + Oracle Data quality incidents (40 hours)   + CSV file of Strategic Marketing dataset (40 hours)   Customer Insights is a Batch ingestion system. Connections can be scheduled to refresh as frequently as every 4 hours TTEC Digital is not responsible for handling GDPR, CCPA or any compliance activities for the customer data.  Less than 1 Million rows of data ingested from each source.  Account data will be added to the Contact during ingestion.  A "Customer Type" field will be created during ingestion to identify if the customer profiles is related to an "Account" or a "Contact". |
| **Customer Insights Customer Activity data ingested**  Less than 1 Million rows of data ingested from each source.  2 Sources/Entities of Customer Activity data   * + Marketing Activity data from Dynamics Marketing   + Ping Consents   Timeboxed to 40 hours per source. |
| **Customer Insights Customer Profiles Created**  Work with the client's subject matter experts to choose which fields to 'Map', and 'Merge' into a single unified Customer profile.  Time boxed to 12 hours (2 hours to Map, 8 hours to Match, 2 hours to Merge)  for each source entity of Customer data:  4 Sources of Customer data |
| **Customer Insights Activities Configured**  Define and configure the activity sources within customer insights to create a unified activity entity.  Timeboxed to 8 hours for each source of Customer activity data:  3 Sources of Customer Activity data |
| **Customer Insights Measures and Segments Workshop**  Meeting to review the data in the Customer Insights and  determine refinements to segments & measures definitions.  Timeboxed to one 4 hour meeting. |
| **Customer Insights Measures created**  Configure the measures defined during initiate and define phase.  This excludes any AI measures as they will automatically be included in those tasks.  Timeboxed to 4 hours per measure for up to 10 measures. |
| **Customer Insights Segments created**  Configure the segments defined during initiate and define phase.  Timeboxed to 4 hours per segment for up to 10 segments. |
| **Customer Insights PowerBI Configured**  Configure PowerBI connection to Customer Insights and provide a simple page view of Customer data.  Timeboxed to 12 hours. |
| **Customer Insights Export to Salesforce CRM**  Work collaboratively with the Clients subject matter experts to configure the native connector to Salesforce CRM and the use of rest APIs to push Account, Contact, email data back into Salesforce  There will be 3 specific use cases of unified customer data into Salesforce:   * Unified Profile (Native Salesforce Connector) * Expose Email Engagement (Native Salesforce Connector) * Global Search (Rest API)   Timeboxed at 60 hours |
| **Customer Insights API connection between KNIME/DBeaver and CI SQL database**  Work collaboratively with the Clients subject matter experts to configure the API connection between KNIME/DBeaver and the Customer Insights SQL database.  This connection to the CI SQL database will be read only.  Timeboxed at 60 hours |
| **Test and Train**  TTEC is responsible for the following: |
| **Marketing Train the Trainer**  Conduct Train the Trainer sessions to prepare the team to conduct end user training.  Timeboxed to 2 (2 hour) training session to support the client for Marketing Application use. |
| **Marketing Train the Administrators**  Conduct Admin Train the Trainer sessions to prepare the team to conduct end user training.  Timeboxed to 2 (2 hour) training session to support the client for  Admin Marketing Application use. |
| **Marketing Testing Plan Development**  TTEC resources will develop a testing plan for UAT to include test use cases and timelines around UAT  Regular scheduled activity: Morning touchpoint to review state of system and use cases to be tested and end of business day touchpoint to review results of the use cases testing and definition of action items.  Timeboxed to 40 hours over a 1 week period |
| **Marketing User Acceptance Testing Kickoff**  UAT Kickoff, presentation of functionality ahead of testing for focus area.  Timeboxed to a 2 hour presentation for each area to review use cases and demonstrate end-to-end functionality ahead of UAT. |
| **Marketing User Acceptance Testing**  Setup: A support line “UAT Room” TEAMS meeting will be opened every day and for the duration agreed upon by the parties.  Tasks & activities: Address assigned tickets assigned to Service Provider resources and training support for any employee that needs it. |
| **Customer Insights Testing Plan Development**  TTEC resources will develop a testing plan for UAT to include test use cases and timelines around UAT |
| **Customer Insights User Acceptance Testing (UAT) Kickoff**  UAT Kickoff, presentation of functionality ahead of testing for focus area.  Timeboxed to one 2 hour meeting |
| **Customer Insights User Acceptance Testing (UAT) execution**  Setup: A support line “UAT Room” TEAMS meeting will be opened every day and for the duration agreed upon by the parties.  Tasks & activities: Address assigned tickets assigned to Service Provider resources and training support for any employee that needs it.  Regular scheduled activity: Morning touchpoint to review state of system and use cases to be tested and end of business day touchpoint to review results of the use cases testing and definition of action items.  Timeboxed to 40 hours over a 1 week period |
| Deploy TTEC is responsible for the following: |
| **Customer Insights Sandbox environment validation**  Review and validate Sandbox environment against use cases. Includes time for remediation efforts.  Timeboxed to 8 hours. |
| **Customer Insights Demo Videos and Help Guides**  TTEC resources will develop demo videos and help guides that the customer can consume during training and post go live |
| **Marketing Demo Videos and Help Guides**  TTEC resources will develop demo videos and help guides that the customer can consume during training and post go live |
| **Customer Insights copied from Sandbox to Production**  During this activity we will create the Production environment and copy it from the Sandbox Environment.  Update the data connection authentication and point it to the production data sources.  Activate/update the refresh schedule.  We will work with the client during the validation of the Production Environment.  Timeboxed to 16 hours. |
| **Customer Insights Production environment validation**  Work in a time-boxed effort with the client during the validation of the Production Environment to remediate any necessary issues.  Timeboxed to 16 hours. |
| **Marketing Go Live Planning and Deployment**  Prep for Go - Live including checklist review and planning  Timeboxed to 8 hours. |
| Transition and Accept TTEC is responsible for the following: |
| **Marketing Post Go-Live Hypercare Support**  Setup: A “Hypercare Room” Microsoft "Teams" meeting will be opened every day and for the duration agreed upon by the parties. Service Provider resources will be available and connected for the duration. Main activity for Hypercare is to address all assigned tickets (entered in the agreed upon tracking system/tool) assigned to Service Provider Resources.   * + Monitoring of relevant system jobs, automation logs, and integrations processes.   + Validation of input data   + Touch points with Client project leads.   + Training reinforcements for any employee that wants to join.   + Updating all records and automations are owned by Client users   + Final updates to documentation and repositories.   + Updating password managers.   + Ensure latest code is checked in.   + Create documentation for transfer of project to appropriate application and maintenance plan.   Timeboxed to 80 hours to be delivered over a 3 week period. |
| **Customer Insights Post Go-Live Hypercare Support**  Setup: A “Hypercare Room” Microsoft "Teams" meeting will be opened every day and for the duration agreed upon by the parties. Service Provider resources will be available and connected for the duration. Main activity for Hypercare is to address all assigned tickets (entered in the agreed upon tracking system/tool) assigned to Service Provider Resources.   * + Monitoring of relevant system jobs, automation logs, and integrations processes.   + Validation of input data   + Touch points with Client project leads.   + Training reinforcements for any employee that wants to join.   + Updating all records and automations are owned by Client users   + Final updates to documentation and repositories.   + Updating password managers.   + Ensure latest code is checked in.   + Create documentation for transfer of project to appropriate application and maintenance plan.   Timeboxed to 80 hours to be delivered over a 3 week period. |

# Out of Scope

* **Marketing related out of scope items:**
* All Marketing Segments will be supplied by Customer Insights
* No Dynamics Marketing Event Management
* No Custom Data Schema

Compliance with laws, regulations, and requirements for legal notices and/or disclaimers related to the functionalities of the services identified herein, which includes but is not limited to chat and/or recording functionality.  TTEC recommends that Client consult their attorney about any legal requirements in their jurisdiction related to software functionalities including those related to chat, and recording, including privacy and recording notices.

In addition to the above, any item not explicitly identified as “in-scope” is out-of-scope of the Services under this SOW.

# Assumptions and Dependencies

* TTEC’s timeline, costs, and deliverables set forth in this SOW are subject to Client’s timely performance of the following obligations and conditions:
* Dates and timelines noted in this SOW are **estimates only** and are provided for initial planning purposes.
* TTEC and Client will jointly manage the project defined under this SOW. Client will designate a Project Manager to act as a primary point of contact for the TTEC project team. The Client Project Manager will have access to the project stakeholders and be responsible for the follow-up and timely completion of Client tasks. Client recognizes that delays in making its decisions and completing its tasks may extend the targeted completion dates and impact the costs associated with the project.
* Client changes to key project stakeholders, including project managers, may impact the project schedule and costs.
* TTEC will develop the project document deliverables using existing TTEC templates. The inclusion of additional information per Client request will be accommodated through a change request.
* TTEC Delivery team will use Jira as the ALM tool using GOREs existing rules around story/Epic completeness and definitions of 'Done'
* Requests for services outside of the scope of this SOW will be handled through the TTEC change request process.  Upon notification of request, TTEC will confirm the scope and the requirements needed to assess cost and/or schedule impact.  Once requirements are confirmed, TTEC will deliver a Change Order (“CO”) for Client approval within 7 - 10 business days.
* Client will notify the TTEC Project Manager of any project scheduling changes no less than 72 hours prior to such published event as indicated by the project timeline or milestone chart specified in the project plan.  A Change Order may be required for modifications to the original project timeline.
* TTEC will perform configurations remotely.
* Cutover support may be performed on-site.

**Customer Insights related assumptions:**

* Customer Insights is a Batch ingestion system. Connections can be scheduled to refresh as frequently as every 4 hours
* TTEC Digital is not responsible for handling GDPR, CCPA or any compliance activities for the customer data.
* All TTEC Digital assigned personnel will be;
  + Granted administrator permissions to the Customer Insights environments.
  + Granted owner role of the resource group and resources where the Azure infrastructure will be deployed.
* Customer data must contain:
  + One field that uniquely identifies each record
  + Fields other than Strings will be strongly typed, any values that are strings will be treated as such.
* All Activity related data must contain:
  + A foreign key value to an entity that is unified during Map, Match, Merge steps
  + At least 1 date field
  + A unique identifier for each record
  + Fields that are formatted correctly, consistently and use exact types.

**Marketing related assumptions:**

* “To-be” business processes will not be significantly changed and are mostly understood and documented.
* All configuration will be completed in production.

Services under and pursuant to this SOW will be provided during regular business hours of Monday through Friday, 8:00 am - 5:00 pm, local time based on Client location where the Services are provided or received, excluding TTEC company holidays (“Regular Business Hours”). Excepting any emergency circumstances resulting in a need for work outside of Regular Business Hours, if any Services under this SOW are required to be provided outside of Regular Business Hours, the parties shall use commercially reasonable efforts to agree in writing, at least ten (10) days in advance, upon the provision and scope of Services to be provided outside of Regular Business Hours.  Client will be invoiced and agrees to pay for any and all Services provided outside of Regular Business on any day other than a holiday (whether or not agreed upon in advance), at 150% the hourly rate for the applicable resources. TTEC’s observed holidays, to include the Friday and Monday of the holiday weekend, are out-of-scope.

# Microsoft Support Plan

|  |  |  |  |
| --- | --- | --- | --- |
| Phase | Description | Deliverable | Cost |
| **Dynamics 365 Customer Insights Support** | Microsoft D365 Silver Medal Plan | * Customer Success Management * Incident Management   -Core Hours Support (8-5 local time)  -8-hour response SLA   * Extended Support   -Eight (8) hours per month, 96 annually   * Release Management   -New wave updates, guidance, and testing - Scheduled and billable | Annual Support Plan  $18,700  Overage rate $239/hr. |
| **Role** | | | **Hours** |
| Silver Support Hours – Dynamics 365 Consultant | | | 96 |

# Services Pricing

|  |  |  |
| --- | --- | --- |
| **Project Phase** | **Hours** | **Extended Price** |
| 1 - Initiate and Define | 315.50 | $64,565.00 |
| 2 - Build | 1,576.75 | $217,692.50 |
| 3 - Test and Train | 137.50 | $21,705.00 |
| 4 - Deploy | 124.25 | $23,217.50 |
| 5 - Transition and Accept | 176.00 | $26,400.00 |
| PM Oversight | 492.25 | $113,217.50 |
| **Implementation Estimate**  $239/hr onshore $75/hr Global Delivery T&M | | $487,639.75 |
| **Silver Support Medal Plan Package**  Annual Fee | | $18,700.00 |
| **\*TTEC Investment** | | ($20,842.25) |
| **Total Estimate** | | **$485,497.50** |

\*TTEC investment discounted rate applies exclusively to the first scope of work. Subsequent Statements of Work (SOWs) will be billed at the standard rate, which is $239 per hour for onshore and $75 per hour for global delivery.

This quote ID QUO-03129-J3S6Y5 expires on 10/1/2023.

|  |  |  |
| --- | --- | --- |
| **Role** | **\*Hourly Rate** | **Hours** |
| BI - Senior Consultant/Data Analyst/Data Engineer | $230 | 484.50 |
| BI - Solution Architect | $230 | 131.50 |
| Dyn365 - Principal Solution Architect/Business Analyst | $230 | 129.50 |
| Dyn365 - Senior Consultant | $230 | 442.75 |
| GDC - BI Consultant | $70 | 655.25 |
| GDC - Dyn365 Consultant | $70 | 484.25 |
| PM - Project Manager | $230 | 494.50 |

# Invoicing and Payment

**Fees**

* Time and Materials (T&M) Professional Services
* This SOW is T&M based. Fees for professional services will be invoiced at the end of each month at Avtex standard hourly rate of $230/hr on-shore, $70/hr Global Delivery, unless defined otherwise under this SOW.
* Fees for any hardware, software, third-party / Manufacturer services, and/or applicable maintenance will be invoiced 100% upon signature and payment is due before work commences.

## Invoicing and Payment

· Note: Any travel and applicable taxes are not included in the pricing summary above.

· Travel time will be invoiced at 50% of regular hourly rates. Client will be charged for automobile mileage at the current allowable federal rate (i.e., the rate allowed for tax purposes). Travel time and mileage within the local area will not be invoiced.

· Failure of Client to make payments on time as due hereunder may result in suspension of Services or the Subscription(s) at TTEC’s discretion and without prejudice to any other rights or remedies available to TTEC at law or in equity. Any suspension shall not relieve Client of its payment obligations hereunder.

Billing Profile Information:

|  |  |
| --- | --- |
| Billing Address: |  |
| Billing Contact Name: |  |
| Contact Phone: |  |
| Contact Email: |  |
|  | o No change to current billing information |