

# **Automation:**

# **Essentials Implementation**

# **Scope of Work**

**OBJECTIVES/PURPOSE**

The **Bullhorn Automation** service is an automation platform that integrates with the Bullhorn and Bullhorn for Salesforce (BH4SF)\*\* ATS and CRM systems. It provides the ability to build ad-hoc automations to send communications to some of the records and users held in the ATS and CRM system, collect feedback from them and update some of the data held in the ATS and CRM system.

**PREREQUISITES**Client is implementing or is live on Bullhorn ATS & CRM system.

**SCOPE OF IMPLEMENTATION**

* Complete the Bullhorn Automation technical setup steps including data sync, email domain setup\*, SMS provisioning\*, a custom tab, and a custom field in the Bullhorn ATS & CRM.
  + \*Note: Depending on the specific Bullhorn Automation package you purchased, you may not have access to these features.
* Provide Client with access to self-paced eLearning modules to facilitate a full understanding of the Bullhorn Automation service allowing for quick use and adoption.
* Provide Client with workshop sessions to answer questions, share best practices and help Client build their first series of standard, recommended and custom automations.

**SCOPE EXCLUSIONS**Scope Exclusions Any services not explicitly defined as in-scope within this document shall be considered out of scope and subject to change control as described below.

**ASSUMPTIONS**  
The client must have all of the following:

* Client is live on Bullhorn ATS & CRM at least two weeks before implementing Bullhorn Automation.
* All configuration, settings, and relevant data in Client’s ATS & CRM system are correct and complete prior to enabling the service described in this document.
* All meetings will be conducted via online meetings.
* Bullhorn will provide all communication and deliverables in the English language.
* Client will provide an English speaking resource.

**CLIENT RESPONSIBILITIES AND ENGAGEMENT EXPECTATIONS**The following is a list of Client obligations associated with this service. If any of the obligations are not upheld, additional costs may be incurred and project activities and access to the Bullhorn Automation solution may be delayed.

* Client is expected to designate a single Project Lead who is familiar with the Bullhorn ATS & CRM and the Client’s unique configuration AND has authority to make necessary decisions on its behalf and who will participate in all project meetings. The Project Lead will be deemed the Bullhorn Automation Subject Matter Expert (SME) and will be expected to collect and disseminate project related information internally throughout the Client. The Project Lead’s decisions will be deemed final on behalf of the Client.
* Client is responsible for providing any information as required by Bullhorn and communicated via the Bullhorn Strategic Consultant.
* Timely Performance: In order to complete the implementation process within the “Estimated Project Timeline” section, the Client commits to the following: o Completing the self-paced eLearning modules within the first 3 days. o Completing the technology setup steps within one week of project kickoff. o Creating the content required for any communications (email or SMS) in a timely manner
  + NOTE: The Client forfeits the included workshop calls if, as a result of the departure of the SME mid-project, or Client’s action or inaction, the implementation process is delayed beyond the allocated Implementation period. If this happens, the Client will need to work with the Account Manager for a change order.

**ESTIMATED TIMELINE**

No onsite work will be performed under this Statement of Work. The Services described in this Statement of Work will be performed remotely over a series of web conference calls. The outline below lists estimated milestones for the Bullhorn Automation implementation. The timing of these milestones may change depending on other Bullhorn services purchased along with this implementation service. Absent other services implemented in tandem, this service is estimated to take 20 hours and to be completed within **8-10 weeks** from kick-off. To the extent that hours and/or duration exceed the estimates outlined in this document, Bullhorn will estimate hours needed to complete the project and provide a change order.

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| **Timeline** | **Milestone** | **Activities** |
| Week 1 | Project Kick Off | Overview of project plan, Review “Setting up for  Success: The Fundamentals of Bullhorn  Automation” and definition of goals. This will be  a 60 minute online meeting. |
| Technical Setup - Bullhorn  Automation | Data sync, email domain\*, SMS provisioning\*, a  custom tab and a custom field in the Bullhorn  ATS & CRM. |
| Client Technical Setup | Email domain\*, SMS settings\* and Website  update. |
| Client eLearning | Client will complete a subset of the self-paced  eLearning modules within 3 days of kickoff. |
| “Build 1” workshop | Automation Training / General Knowledge.  Client and the Bullhorn Strategic Consultant will  work through 4 of the top standard use cases to  implement using pre-existing Blueprints (BP).  This will be a 90 min online meeting |
| Client completion | Client will complete any content or other outstanding tasks from the initial workshop prior to Build 2 workshop. |
| Week 2 | “Build 2” workshop | Client hands-on experiences with Bullhorn Strategic Consultant support to create 3 additional standard automations using pre-existing Blueprints (BP). This will be a 90 min online meeting |
| Client completion | Client will complete 2 standard automations from Blueprints, and complete outstanding tasks from the initial workshops prior to Build 3 workshop |
| Week 3 | “Build 3” workshop | Client hands-on experiences with Bullhorn Strategic Consultant support to create 3 additional standard automations using pre-existing Blueprints. Client will “activate” automations created in previous Build workshops. This will be a 90 min online meeting. |
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| Client completion | Client will create one automation and determine use cases for custom automations |
| Week4 | “Review” Workshop | Client and the Strategic Consultant will review and finalize initial automations. Additional automations will be reviewed as well. This will be a 60 min online meeting |
| Client completion | Client will complete outstanding tasks from previous workshops prior to Build 4 workshop. |
| Week 5 | “Build 4” workshop | Client Specific Use Cases / Identify Custom Automations (non BP) and Integrations. Hands on build of Custom (non BP) automation - 2 Automations. Client will “activate” automations created in previous Build workshops. This will be a 90 min online meeting. |
| Client completion | Client will complete 2 more custom automations. |
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| Week 6 | “Analyze” Workshop | Analyze results from the activated automations. Make any suggestions and discuss questions or problems. Additional automations and questions will be reviewed as well. This will be a 60 min online meeting. |
| Client Completion | Client will complete a Knowledge based Quiz and Hands on Assessment to verify readiness for Graduation to Support |
| Activation | Client will “activate” automations created in previous Build workshops. |
| Week 7 | Adoptions Metrics Review | This will be a 30 min online meeting. |
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| Week 8 | Client Support transition | The main contact for questions and issues will now be Bullhorn Automation Support. This will be a 30 min online meeting. |
| Ongoing | Client Success Review | A Client Success Representative will conduct 1 account review within the first 6 months of service which will consist of analyzing usage and automations. The findings will be presented over the course of a 60 minute online meeting. |
| Help Resources | Self-Serve Help Center with help articles, video tutorials, and best practices advice. Downloadable white papers detailing best practices, common automations, engagement strategy, building content tips, and more. |

**PROJECT COMPLETION**Once the service has gone live the Client will report all issues to Bullhorn Automation Support. Every effort will be made to resolve issues reported during implementation prior to transition to support. Critical issues, defined as having a major impact to business processing, will be considered as blockers to project close.

Note: For Bullhorn Automation Implementations that are included as part of a larger new client ATS/CRM implementation, Client should not expect the automations to completely sync until go live week 2. This does not apply for Clients that are already live, and adding on Bullhorn Automation as a new feature.

**CHANGE CONTROL**

The hours required for tasks and deliverables in the Timeline section above are estimates based on Bullhorn's experience with past projects. If additional hours in excess of the estimate are required, the Parties will follow the change order process described below, and such additional hours will be billed at the standard Bullhorn Professional Services T&M hourly rate, unless otherwise agreed by the Parties in writing. Bullhorn does not make adjustments to any Billing Start Dates (BSD) should a billing start date be associated with this work. The client is responsible for notifying Bullhorn a minimum of 5 business days in advance of missing any agreed-upon dates in the project plan. Failure to notify your Bullhorn Strategic Consultant in writing of such a delay may result in delays and potential additional charges. Common activities that can lead to projects exceeding the estimates include additional or prolonged meetings, delayed approvals, multiple review cycles, scope creep, canceled / rescheduled meetings, project plan revisions due to missing due dates for key tasks, lack of stakeholder prioritization, delayed decision making, request for analysis on out of scope items, changes post spec or configuration sign-off, etc.

The change order process consists of the following steps:

* The project team identifies that a change order is needed.
* Bullhorn creates an official project change request with the scope of the change and the estimate
* Bullhorn and the client review the change request
* Client approves or declines the change request
* If the Change Request is approved, the appropriate project artifacts are updated NOTE: Declining a change request for items that are required to complete a project could result in the project being canceled

**KEY ASSUMPTIONS**

Tonic HQ, Inc. assumes the following:

* This service must be included as an additional scope item for Clients implementing or already live on Bullhorn ATS & CRM with the Novo release or Bullhorn One.
* Client has dedicated resources available to assist Tonic HQ in the discovery, design and testing processes.
* All forms must be delivered from Clients to Tonic HQ in PDF format.
* Client is implementing or is live on Bullhorn ATS & CRM system.
* All configuration, settings, and relevant data in Client’s ATS & CRM system are correct and complete prior to enabling the service described in this document.
* Tonic HQ will provide all communication and deliverables in the English language.
* Client will provide an English-speaking resource.

**ACCEPTANCE**

Once the service has gone live, the Client will report all issues to Bullhorn Support.

Once the service has gone live the Client will have up to 1 week to report any issues to Tonic HQ. Issues found during post go-live will be triaged by the project team and prioritized. Not all issues reported will be fixed prior to transition to support - Critical issues, defined as having a major impact to business processing will be considered as blockers to project close.

Tonic HQ and Client will consider this project complete upon completion of Go Live, testing and validation processes, and client sign-off and acceptance.

**PRICING**

Tonic HQ will perform the activities listed in this scope of work and completion of this project for the flat fee of **$19,000 USD** made in payments:

* 50% upon contract signing
* 50% at project completion and Client sign-offs and acceptance

**CONTRACT**

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| **clientCompany** |

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| --- |
| **dateSigned** |

This Agreement, dated effective is made and entered into by and among (“Client”) and Tonic HQ, Inc. (“Tonic HQ”).

**SERVICES**

The Client has engaged Tonic HQ to provide services as described in the Scope of Work outlined in the preceding pages. Tonic HQ will provide these services as outlined.

**CONFIDENTIALITY**

In order for Tonic HQ to perform the services outlined, it may be necessary for the Client to provide Tonic HQ with Confidential Information regarding the Client's business and products. The Client will rely heavily upon Tonic HQ’s integrity and prudent judgment to use this information only in the best interests of the Client. Tonic HQ may be exposed to and will be required to use certain "Confidential Information" of the Client. Tonic HQ agrees that it will not use, directly or indirectly, such Confidential Information for the benefit of any person, entity, or organization other than the Client, or disclose such Confidential Information without the written authorization of the President of the Client, either during or after the term of this Agreement, for as long as such information retains the characteristics of Confidential Information.

**STANDARD OF CONDUCT**

In rendering services under this Agreement, Tonic HQ shall conform to high professional standards of work and business ethics. Tonic HQ shall not use time, materials, or equipment of the Client without the prior written consent of the Client. In no event shall Tonic HQ take any action or accept any assistance or engage in any activity that would result in any university, governmental body, research institute or other person, entity, or organization acquiring any rights of any nature in the results of work performed by or for the Client.

**SIGNATURE**

1. Please read the contract on the previous pages to make sure you understand all the details involved. It's important to us that everything is transparent and understood from the beginning so that we lay a solid foundation for a great working relationship.
2. If you have any questions at all, please let us know. We are happy to clarify any points and there may be some items that we can sort out together. We're committed to finding the best way to work together.
3. Once you feel confident about everything and are ready to move forward, sign the document either physically or electronically (if you’ve been provided with a link to sign electronically).
4. Once we receive notification of your acceptance, we'll contact you shortly after to sort out next steps and get the project rolling.
5. If you'd like to speak to us by phone, don't hesitate to call us at (559) 412-5240.

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| Client |  | Tonic HQ, Inc. |
| clientSignature |  | thqSignature |
| clientName |  | thqName |
| clientTitle |  | thqTitle |