

# **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 n b b b Client build their first series of standard, recommended and custom automations.

**TIMELINE**

Assuming no scope changes, Tonic HQ estimates **15-16 weeks** from our Kick-Off Callto Go Live. Tonic HQ will provide regular status reports and project updates.

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| **Timeline** | **Milestone** | **Activities** |
| Week 1 | Project Kick Off | Overview of project timeline, integration inclusions, project teams, goals and action items. (30 min)    Review: Client will have already completed the Location / Blueprint worksheet and shared the company logo. |
| Review Setup - Able | New Staging Instance created prior to kick off. |
| Client completion | Client will deliver all Core and Client forms |
|  | Forms are provided by Client (150). |
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|  | Name of participants that will create forms for Admin user log in. |
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|  | Client will complete E-Verify. agreement and company profile. |
| Week 2 | Tonic HQ completion | Form Audit of 150 client forms (15 hours). |
| Week 3 | Form Building Best Practices and Consulting | Implementation Consultant review and give recommendations on how to update the PDFs. Utilizing Form Implementation Workbook. (90 min) |
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| Tonic HQ completion | Implementation Consultant will begin form build for ready Forms. |
| Client completion | Client will make recommended updates to forms. |
| Week4 | Form / Package Build | Client / Implementation Consultant will build Core and Client forms / packages. Implementation Consultant will enable all state and federal blueprints within the client’s Staging environment. (90 min) |
| Training |
| Client completion | Client / Implementation Consultant will build Core and Client forms / packages. |
| Week 5/6 | Q&A on form building | Questions, status - how forms built by client to date. (30 min) |
| Form / Package Build Activity | Client / Implementation Consultant will build Core and Client forms / packages. Implementation Consultant will enable all state and federal blueprints within the client’s Staging environment. |
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| Week 7 | Configuration Workshop 1 | Implementation Consultant will lead walkthrough of Staging environment, capturing client configuration and integration decisions. Implementation Consultant will demo onboarding workflow utilizing a subset of blueprints and/or forms. IC will provide the Staging URL and set up the custom Bullhorn tab, System Settings, profile set up, I9/ E Verify (90 min) |
| Week 8 | Configuration Workshop 2 | Intro to BH field mapping to forms (90 min) |
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| Client completion | Client Client update/complete the Mapping Document. will complete outstanding tasks from previous workshops. |
| Week 9 | Admin Training | Full system overview of Able system settings, Admin configurations permissions. (60 min) |
| Week 10 | System Review Workshop | Review of config, settings, forms, and prep for UAT (60 min). |
| Week 11/12 | UAT | 2 weeks initial UAT: Client will create test account(s) in BH and initiate the onboarding process through the Able tab. Create onboarding workflow(s) based on testing scripts provided by Implementation Consultant. UAT log created by IC. Receive Customer UAT sign-off. |
| Week 13 | UAT Fixes | Client / BH updating forms, bug triage, etc. |
| Week 14 | End to End UAT | Final review |
| Week 15 | User Training | Navigation of BH and Able systems workflow, package review and initiating onboarding workflow. (45 min) |
| MTP | IC promotes Staging to Prod, update BH custom tab, provide client prod URL. (60 min) |
| Client Support | Support intro meeting (30 min) |
| Transition |  |
| Ongoing | Client Success Review | A Client Success Representative will conduct 1 account review within the first 3 months of service which will consist of analyzing usage. (30 min) |
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| 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. |
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**CHANGE CONTROL**

The estimated hours described in the Timeline section above are estimates based on 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 Tonic HQ 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.

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.
* Tonic HQ creates an official project change request with the scope of the change and the estimate.
* Tonic HQ 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 |