

# **Talent Platform:**

# **Intermediate**

# **Scope of Work**

**OBJECTIVES/PURPOSE**

* The goal of this project is to assist Client in their implementation of Bullhorn’s **Talent Platform Essentials** service includes the **Automation**, **Onboarding** and **Talent Portal** Essentials packages which integrate with the Bullhorn ATS & CRM systems. Support and Implementation services will be provided for the technical aspects, as well as operational and training support.

**SCOPE OF IMPLEMENTATION**

* Complete the Onboarding Connect setup steps including Staging instance creation, customer branding, location information and user creation.
* Host Configuration Workshop sessions to answer questions, share best practices and capture client decisions pertaining to system configurations and integrations.
* Build (1) Staging instance and (1) Production instance.
* Configure up to (4) Brands, and/or up to 40 locations.
  + Any Client that needs 4+ Brands or 40+ locations will require a Discovery Package and custom Delivery SOW.
* Assist Client in building up to 150 Core and Client forms.
* Conduct three remote conference training sessions: Admin, Form Building, User.
* Deliver and execute Move to Production (MTP) plan.
* Functional Features Included:
  + **Talent Portal**
    - Application - Generic and job specific (link) Sign Up and Profile creation (Job preferences, Education history, Work history, WOTC, Pre-screening)
    - Pre-hire Automation
    - Self-Service Documents - DD + Withholdings
    - Employee Resources and Healthcare Information- basic content hosting
    - Submit a Referral
  + **Onboarding Talent Edition**
    - US tax and Employment law, Canada tax, placement sync, form/package delivery tasks, form/package completion tasks, quizzes / tests
    - Credential File Uploads - Up to 10, does not include automation
    - Translation(s): System settings, Forms require delivery in preferred language
    - Integrations Included:
      * E-Verify
      * Background Screening
      * WOTC
  + **Automation**: Tonic HQ will assign a resource to complete the following tasks as part of the project:
    - 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.
    - Includes 30+ Automations

**TIMELINE**

Assuming no scope changes, Tonic HQ estimates **22 - 23 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 - 2 | Project Kick Off | **Onboarding**: Overview of project timeline, integration inclusions, project teams, goals and action items.  **Automaton**: “Setting up for Success: The Fundamentals of Bullhorn Automation”.  (30 min) |
| Technical Set up | **Onboarding**: new Staging instance created prior to kickoff  **Automaton**: Data sync, email domain\*, SMS provisioning\*, a custom tab and a custom field in the Bullhorn ATS & CRM. |
| Client completion | **Onboarding**:   * Client will deliver all Core and Client forms. Forms are provided by Client (150). * Name of participants that will create forms for Admin user log in. * Client will complete E-Verify. Agreement and company profile.   **Automaton**: Client will complete a subset of the self-paced eLearning modules within 3 days of kickoff. |
| Tonic HQ completion | **Onboarding**: Form Audit of 150 client forms (15 hours) |
| Week 3 - 6 | Form / Package Build  Training | **Onboarding**: Client / Implementation Consultant will build Core and Client forms / packages. Implementation Consultant will enOnboarding all state and federal blueprints within the client’s Staging environment. (90 min) |
| Client completion | Client / Implementation Consultant will build Core and Client forms / packages. |
| Automation “Build 1”  workshop | **Automaton**: Training / General Knowledge. Client and the Implementation Consultant will work through 4 of the top standard use cases to implement using pre-existing Blueprints (BP). (90 min) |
| Week 7 | 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 enOnboarding all state and federal blueprints within the client’s Staging environment. |
| Week 8 - 9 | Configuration  workshop 1 | **Onboarding**: 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. SC will provide the Staging URL and set up the custom Bullhorn tab, System Settings, profile set up, I9/ E Verify (90 min) |
| Configuration  workshop 2 | **Onboarding**: Intro to BH field mapping to forms This will be a 90 min online meeting. |
| Client completion | **Onboarding**: Client update/complete the Mapping Document. will complete outstanding tasks from previous workshops.  **Automation**: Client will complete any content or other outstanding tasks from the initial workshop prior to Build 2 workshop. |
| Week 10 - 11 | Admin Training | **Onboarding**: Full system overview of Onboarding system settings, Admin configurations permissions. (60 min) |
| Automation “Build 2” workshop | **Automation**: Client hands-on experiences with Implementation Consultant to create 3 additional standard automations using pre-existing Blueprints (BP). (90 min) |
| Client completion | **Automation**: Client will complete 2 standard automations from Blueprints, and complete outstanding tasks from the initial workshops prior to Build 3 workshop. |
| Week 12 - 13 | Automation “Build 3” workshop | **Automation**: Client hands-on experiences with Implementation Consultant to create 3 additional standard automations using pre-existing Blueprints. Client will “activate” automations created in previous Build workshops. (90 min) |
| Onboarding: Configuration workshop 3 | **Onboarding**: Review Pre-hire category-based configurations and placement automation. (90 min) |
| Client completion | **Onboarding**: Client will complete outstanding tasks from previous workshops.  **Automation**: Client will create one automation and determine use cases for custom automations. |
| Week 14 - 15 | “Review” workshop | **Automation**: Client and the Implementation Consultant will review and finalize initial automations. Additional automations will be reviewed as well. (60 min) |
| System Review workshop | **Onboarding**: Review of config, settings, forms, and prep  for UAT (60 min). |
| Client completion | **Onboarding**: Client will update/complete the Mapping Document.  **Automation**: Client will complete outstanding tasks from previous workshops prior to Build 4 workshop. |
| Week 16 - 17 | “Build 4” workshop | **Automation**: Client Specific Use Cases / Identify Custom Automations (non BP) and Integrations. Hands on build of Custom (non BP) automation.  **Automations**. Client will “activate” automations created in previous Build workshops.  (90 min) |
| Client completion | **Onboarding**: Client will update/complete the Mapping Document.  **Automation**: Client will complete 2 more custom automations. |
| “Analyze” workshop | **Automation**: Analyze results from the activated automations. Make any suggestions and discuss questions or problems. Additional automations and questions will be reviewed as well. (60 min) |
| Client Completion | **Automation**: Client will complete a knowledge-based Quiz and Hands on Assessment to verify readiness for Graduation to Support. |
| Activation | **Automation**: Client will “activate” automations created in previous Build workshops. |
| Week 18 - 19 | UAT | **Onboarding**: Two-week initial UAT: Client will create a test account(s) in BH and initiate the onboarding process through the Onboarding tab. Create onboarding workflow(s) based on testing scripts provided by Implementation Consultant. UAT log created by SC. Receive Customer UAT sign-off. |
| UAT Fixes | **Onboarding**: Client / THQ updating forms, bug triage, etc. |
| End to End UAT | **Onboarding**: Final review |
| Week 20 | UAT Fixes | **Onboarding:** Client / THQ updating forms, bug triage, etc. |
| Week 21 | End to End UAT | **Onboarding:** Final review |
| Week 22 | User Training | **Onboarding**: Navigation of BH and Onboarding systems workflow, package review and initiating onboarding workflow. (45 min) |
| Client Support transition | The main contact for questions and issues will now be Bullhorn Support. (60 min) |
| MTP | **Onboarding**: SC promotes Staging to Prod, update BH custom tab, provide client prod URL. (60 min) |
| Ongoing | Client Success Review | A Client Success Representative will conduct one account review within the first 3 months of service which will consist of analyzing usage. (30 min) |
| Help Resources | Self-Serve Help Center with help articles, video tutorials, and best practices advice.  Download Onboarding white papers detailing best practices, common automations, engagement strategy, building content tips, and more. |

**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 included as part of the overall Digital Transformation Package Project. Pricing for this project is included in that package pricing.

**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 |