

# **Bullhorn Implementation**

# **Proposal**

# **Scope of Work**

**OBJECTIVES/PURPOSE**

* The goal of this project is to assist Client in their move to and implementation of Bullhorn{#existingSystem} from **{existingSystem}**{/existingSystem}. Support and Implementation services will be provided for both the data and technical aspects, as well as operational and training support.

**SCOPE OF IMPLEMENTATION**

* Discovery and workflow analysis of Client’s existing processes.
* Assist Client with the process of acquiring a complete data export from current software provider.
* Recommend process and technical improvement recommendations based on discovery and Bullhorn workflow.
* Configuration of Client’s Bullhorn instance based on client specific requirements
  + Configuration of the following Bullhorn products:{#products}
    - **{.}**{/products}
  + Includes **{plCount}** private label(s)
* Process and normalize data to assist with the migration of existing data into Client’s Bullhorn instance. Data migration includes the following entities if they are available in Client’s existing software:
  + Leads
  + Opportunities
  + Contacts
  + Companies
  + Candidates
    - Certifications
    - Education
    - References
    - Work History
  + Job Orders
    - Submissions
    - Client Submissions
  + Placements
  + Appointments
  + Notes
  + Tasks
  + Tearsheets
* Perform a test migration into Client’s Bullhorn instance.
* Assist Client with the process of user acceptance testing of configuration and data migration.
* Perform changes to data and/or configuration based on user acceptance testing.
* Assist Client with Bullhorn Marketplace Vendor implementations
  + Assist with Vendor implementations by providing the necessary Bullhorn expertise and knowledge of the Client’s processes and Bullhorn configuration.
  + Participate in Vendor calls to assist in the implementation of the Vendor’s product.
* Training Services
  + Provide guidance on utilization of existing Bullhorn training resources. Existing Bullhorn content is used as pre-work. Tonic HQ training is customized to the client's environment and provided remotely, via webinar.
  + Document processes and configuration that deviates from standard Bullhorn product.
  + Provide live training focused on changes customized to Client’s implementation. Cover key aspects of the system and specific user roles (Admin, Back Office, Onboarding, etc.).
  + Bullhorn Enterprise ATS Implementations include four sessions, which equal approximately 5.5 hours.
  + An outline of training topics can be found on our Training Offerings page: (<https://tonichq.com/training-offerings>).
* Post Go Live Support:
  + Testing and validation of final data migration and Go Live functionality.
  + Support during week of Go Live.
  + Assist Client with transition to Bullhorn Support.
  + Follow-up meeting(s) post Go Live to identify areas of concern and devise a plan to address those areas.
    - In the event remediation requires work outside this scope of work, Tonic HQ will work with Client to provide a scope of work that will address those items.{#paidAdditions}
* Additional included services:{#newHireExport}
  + New Hire export{/newHireExport}{#qbIntegration}
  + Quickbooks integration{/qbIntegration}{#InvoiceExport}
  + Invoice export{/InvoiceExport}{#PayDataExport}
  + Paydata export{/PayDataExport}{#emailsAsNotes}
  + Importing email as notes{/emailsAsNotes}{#histSubmissions}
  + Loading historical submissions{/histSubmissions}{#npeCount}
  + Creation and configuration of **{npeCount}** non-production environments.{/npeCount}{#oscpCount}
  + Creation and/or customization of **{oscpCount}** Open Source Career Portals.{/oscpCount}{/paidAdditions}

**SCHEDULE**

Assuming no scope changes, Tonic HQ is estimating the following timeframe for implementation. Note, the given timeframes are for each task (or group of tasks), with some items running concurrently.{#timelineNoDM}

|  |  |
| --- | --- |
| Project Phase | Timeframe |
| Discovery and Workflow Analysis | 3-4 weeks |
| Bullhorn Configuration | 1-2 weeks |
| Configuration Testing | 1-2 weeks |
| Configuration Signoff | **Milestone** |
| Training Customization and Delivery | 1-2 weeks |
| Client Signoff for Go Live | **Milestone** |
| Go Live | **Milestone** |
| Post Go Live Support | 1 week |
| Post Go Live Follow-Up Meeting | 1-month Post Go Live (approx.) |

{/timelineNoDM}{#timelineSMB}

|  |  |
| --- | --- |
| Project Phase | Timeframe |
| Discovery and Workflow Analysis | 1 week |
| Bullhorn Configuration | 1-2 weeks |
| Configuration Testing | 1-2 weeks |
| Configuration Signoff | **Milestone** |
| Data Process | 1-2 weeks |
| Data Migration and Testing | 1-2 weeks |
| Training Customization and Delivery | 1 week |
| Client Migration Validation | 1 week |
| Changes based on Migration Review | 2-3 days |
| Client Signoff for Go Live | **Milestone** |
| Final Data Migration and Go Live | **Milestone** |
| Post Go Live Support | 1 week |
| Post Go Live Follow-Up Meeting | 1-month Post Go Live (approx.) |

{/timelineSMB}{#timelineField}

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| --- | --- |
| Project Phase | Timeframe |
| Discovery and Workflow Analysis | 4-5 weeks |
| Bullhorn Configuration | 4-5 weeks |
| Configuration Testing | 1-2 weeks |
| Configuration Signoff | **Milestone** |
| Data Process | 5-6 weeks |
| Data Migration and Testing | 3-4 weeks |
| Training Customization and Delivery | 4-5 weeks |
| Client Migration Validation | 2 weeks |
| Changes based on Migration Review | 2 weeks |
| Client Signoff for Go Live | **Milestone** |
| Final Data Migration and Go Live | **Milestone** |
| Post Go Live Support | 1 week |
| Post Go Live Follow-Up Meeting | 1-month Post Go Live (approx.) |

{/timelineField}{#timelineBH1}

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| --- | --- |
| Project Phase | Timeframe |
| Discovery and Workflow Analysis | 4-6 weeks |
| Bullhorn Configuration | 4-5 weeks |
| Configuration Testing | 2-3 weeks |
| Configuration Signoff | **Milestone** |
| Data Process | 5-7 weeks |
| Data Migration and Testing | 5-7 weeks |
| Training Customization and Delivery | 4-5 weeks |
| Client Migration Validation | 2-4 weeks |
| Changes based on Migration Review | 2 weeks |
| Client Signoff for Go Live | **Milestone** |
| Final Data Migration and Go Live | **Milestone** |
| Post Go Live Support | 3-4 weeks |
| Post Go Live Follow-Up Meeting | 1-month Post Go Live (approx.) |

{/timelineBH1}

Based on the above timeframes and **{userCount}** users, Tonic HQ estimates **{timelineWeeks}** from our Kickoff Callto Go Live. Tonic HQ will provide regular status reports and project updates.

**KEY ASSUMPTIONS**

Tonic HQ, Inc. assumes the following:

* Client has dedicated resources available to assist Tonic HQ in the discovery, design and testing processes.
* Client does not require Tonic HQ to perform any custom integrations with vendors (Bullhorn Marketplace or otherwise) not outlined in this Scope of Work. {^noDataMigration}{#existingSystem}
* Datasource for the migration is **{existingSystem}**.{/existingSystem}{#addtlDatasources}
* Additional Datasource(s) for the migration are **{addtlDatasources}**.{/addtlDatasources}
* Client’s existing software vendor can provide Tonic HQ with a complete database export in SQL format. {/noDataMigration}

**ACCEPTANCE**

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 **{totalAmt}** made in payments:{#paymentsTwo}

* 50% upon contract signing
* 50% at project completion and Client sign-offs and acceptance{/paymentsTwo}{#paymentsThree}
* 35% upon contract signing
* 35% upon Go Live
* 30% at project completion and Client sign-offs and acceptance{/paymentsThree}

{#oscpOption} TODO **OPEN SOURCE CAREER PORTAL CREATION**

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| --- | --- |
| \T\ | Creation and customization of Bullhorn’s Open Source Career Portal. **{ocspAmt}** |

{/oscpOption}{#onSiteTraining}**ON-SITE TRAINING (OPTIONAL)**

|  |  |
| --- | --- |
| \T\ | Customized training based on client’s requirements delivered prior to Go Live. Includes two trainers on-site at client‘s desired location for a total of two days. Note: price does not include travel expenses. **{onSiteTrainingAmt}** |

{/onSiteTraining}{#afterCare}**WHITE GLOVE AFTER-CARE (OPTIONAL)**

|  |  |
| --- | --- |
| \WG\ | **90-day Post Go Live Tonic HQ Support {afterCareAmt}** |

Our standard engagement ends Post Go Live once the client has agreed that the project is complete and if applicable, any migration issues have been resolved. We've developed our optional White Glove After-care at the request of our clients who are looking for a higher level of support in the critical period after Go Live.

Under this plan, Tonic HQ will continue to be your single point of contact for all things Bullhorn. Throughout your implementation, we'll have gotten to know your business and how you do what you do. That, combined with decades of Bullhorn experience, puts us in a unique position to support your business during this phase.

For 90-days Post Go Live, Tonic HQ will be your single source of support. You, and your end users, can reach out to our support team via phone or email. All incoming requests will be converted to tickets and triaged accordingly. We'll work with a designated person in your organization to ensure that all issues are dealt with satisfactorily, as well as recommend opportunities for complementary additional training, minor configuration changes, or help you learn to navigate getting support from Bullhorn directly. Our goal is to spend this time ensuring that you and your team are getting off on the right foot; that your Bullhorn environment is working well and that your team(s) are comfortable using the system.

{/afterCare}**ADDITIONAL OPTIONAL SERVICES**

While outside the scope of this project, Tonic HQ can provide the following services at an additional cost. Should any of these services be required, Tonic HQ will perform discovery and provide a scope of work for those services. Some examples of additional, options servers may include:

* Custom Development including but not limited to:
  + Bullhorn Custom Functionality
    - Custom Tabs, Cards and Menu Actions
    - Field Interactions
    - Form Scripts
    - Scheduled Event Tasks
  + Custom Reports or exports not listed in scope of implementation section above
  + Datamirror setup and implementation
  + Integrations not specifically listed in this scope of work
* Data integrity validation, de-duplication or transformation other than what is necessary to map the Client’s existing data to Bullhorn entities{^qbIntegration}
* Quickbooks integration{/qbIntegration}{^emailsAsNotes}
* Importing email as notes{/emailsAsNotes}{^histSubmissions}
* Loading historical submissions{/histSubmissions}{^npeCount}
* Creation and configuration of non-production environment(s).{/npeCount}{^oscpCount}
* Creation and/or customization of Open Source Career Portal(s).{/oscpCount}
* Additional and/or customized training
* On-site training or support
* On-site go-live support
* Follow-on project work

**CONTRACT**

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

|  |
| --- |
| **clientCompany** |

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're 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 a link to sign electronically).
4. Once we receive notification of your acceptance, we'll contact you shortly 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.

ClientTonic HQ, Inc.

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| --- |
| clientSignature |
| clientName |
| clientTitle |

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| --- |
| thqSignature |
| thqName |
| thqTitle |