

# **Bullhorn** {#timelineBH1}**One** {/timelineBH1}**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. {^NoDataMigration}
* Assist Client with the process of acquiring a complete data export from current software provider. {/NoDataMigration}
* 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) {^NoDataMigration}
* 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. {/NoDataMigration}
* Assist Client with the process of user acceptance testing of configuration{^NoDataMigration} and data migration{/NoDataMigration}.
* Perform changes to {^NoDataMigration} data and/or {/NoDataMigration}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 when necessary, 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 the 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 6 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 {^NoDataMigration}final data migration and {/NoDataMigration}Go Live functionality.
  + Support during the 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 environment(s).{/npeCount}{#oscpCount}
  + Creation and configuration of **{oscpCount}** Open Source Career Portal(s).{/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 Wrap-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 Wrap-Up Meeting | 1-month Post Go Live (approx.) |

{/timelineSMB}{#timelineField}

|  |  |
| --- | --- |
| 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 Wrap-Up Meeting | 1-month Post Go Live (approx.) |

{/timelineField}{#timelineBH1}

|  |  |
| --- | --- |
| 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 | 4-8 weeks |
| Post Go Live Wrap-Up Meeting | 1-month Post Go Live (approx.) |

{/timelineBH1}

Based on the above timeframes and **{userCount}** users, Tonic HQ estimates **{timelineWeeks}** from our Kick-Off 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}**.
* Client is able to provide Tonic HQ with a user login to **{existingSystem}** with access to view all records.{/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 or a format that can be imported into SQL, such as CSV. {/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} USD** made in payments:{#payments\_two}

* 50% upon contract signing
* 50% at project completion and Client sign-offs and acceptance{/payments\_two}{#payments\_three}
* 35% upon contract signing
* 35% upon completion of Discovery and Configuration
* 30% at project completion and Client sign-offs and acceptance{/payments\_three}{#payments\_four}
* 30% - At contract signing
* 30% - 60 days after contract signing
* 30% - 120 days after contract signing
* 10% - At project completion and Client sign-offs and acceptance{/payments\_four}{#payments\_five}
* 20% - At contract signing
* 20% - 45 days after contract signing
* 20% - 90 days after contract signing
* 20% - 135 days after contract signing
* 20% - At substantial completion and client’s acceptance of the project, which such acceptance shall not be unreasonably withheld or delayed by client and in no event shall final payment shall be made later than 60 days of substantial completion of the project.{/payments\_five}{#bullhornSubsidy}

Provided that Bullhorn is providing a subsidy for this implementation, Client will be responsible for any remaining balance using the payment structure defined above. {/bullhornSubsidy}{#oscpOption}

**OPEN SOURCE CAREER PORTAL (OPTIONAL)**

|  |  |
| --- | --- |
| \O\ | Creation and customization of Bullhorn’s Open Source Career Portal. **{ocspAmt} USD** for the first instance. Additional instances billed at 50%. |

{/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} USD** |

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

|  |  |
| --- | --- |
| \WG\ | **30-day Post Go Live Tonic HQ Support** **{afterCareAmt} USD** |

Our standard engagement ends Post Go Live once the client has agreed that the project is complete{^NoDataMigration} and if applicable, any migration issues have been resolved{/NoDataMigration}. We have 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 will 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 30-days Post Wrap-Up, 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 optional services may include:

* Bullhorn Automation Implementation
  + Clients can choose the Bullhorn Automation Implementation package based on their needs during or after implementation.
* 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 the 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

{#onbTalentEss}



# **Onboarding Talent Edition:**

# **Essentials**

# **Scope of Work**

**OBJECTIVES/PURPOSE**

* The goal of this project is to assist Client in their implementation of Bullhorn’s **Onboarding Talent Edition**. Support and Implementation services will be provided for the and technical aspects, as well as operational and training support.

**SCOPE OF IMPLEMENTATION**

* Complete the Onboarding Talent Edition 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 25 locations.
  + Any Client that needs 4+ Brands or 25+ Locations will require a Discovery Package and custom Delivery SOW.
* Assist Client in building up to 50 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:
  + Basic Candidate portal - basic profile information, onboarding history
  + Onboarding - 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

**TIMELINE**

Assuming no scope changes, Tonic HQ estimates **12 - 14 weeks** from our Kick-Off Callto Go Live. Tonic HQ will provide regular status reports and project updates.

|  |  |  |
| --- | --- | --- |
| 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 (50).  Name of participants that will create forms for Admin user log in.  Client will complete E-Verify agreement and company profile. |
| Week 2 | Tonic HQ completion | Form Audit of 50 client forms (5 hours). |
| Form Building Best  Practices and  Consulting | Implementation Consultant review and give recommendations on how to update the PDFs.  Utilizing Form Implementation Workbook. (90 min) |
| Tonic HQ completion | Implementation Consultant will begin form build for ready Forms. |
| Client completion | Client will make recommended updates to forms. |
| Week 3 | Form / Package Build  Training | 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) |
| Client completion | Client / Implementation Consultant will build Core and Client forms / packages. |
| Week 4 | 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. |
| Week 5 | 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. SC will provide the Staging URL and set  up the custom Bullhorn tab, System Settings, profile set up, I9/ E Verify (90 min) |
| Week 6 | Configuration  workshop 2 | Intro to BH field mapping to forms (90 min) |
| Client completion | Client Client update/complete the Mapping Document. will complete outstanding tasks from previous workshops. |
| Week 7 | Admin Training | Full system overview of Able system settings, Admin configurations permissions. (60 min) |
| Week 8 | System Review  workshop | Review of config, settings, forms, and prep for UAT (60 min). |
| Week 9 | UAT | 1 week 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 SC. Receive Customer UAT sign-off. |
| Week 10 | UAT Fixes | Client / BH updating forms, bug triage, etc. |
| Week 11 | End to End UAT | Final review |
| Week 12 | User Training | Navigation of BH and Able systems workflow, package review and initiating onboarding workflow. This will be a 45 min online meeting. |
| MTP | SC promotes Staging to Prod, update BH custom tab, provide client prod URL. (60 min) |
| Client Support  Transition | Support intro meeting (30 min) |
| 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) |
| 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. |

**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.

{/onbTalentEss}

**CONTRACT**

|  |
| --- |
| **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 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.

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