

# **Bullhorn** {#timelineBH1}**One** {/timelineBH1}**Implementation**

# **Proposal**

**OBJECTIVES/PURPOSE**

* The objective of this project is to facilitate Client’s transition to Bullhorn{#existingSystem} from **{existingSystem}**{/existingSystem} providing both data and technical support, as well as operational guidance and training.

**CONTRACT**

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

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

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

**SERVICES**

Tonic HQ is engaged by the Client to provide the services delineated in the following Scope(s) of Work. The services include the configuration of the following Bullhorn products:{#products}

* **{.}**{/products}

**TIMELINE**In cognizance of the products involved and presuming optimal scheduling, the preliminary timeline for this implementation is set forth below. We will devise a more specific timeline and share it with you post-agreement finalization.

{%image}

**ACCEPTANCE**Tonic HQ and Client will consider this project complete upon successful Go Live, validation, testing processes and the Client’s official acceptance.

Payments shall be made by Client as outlined below with a full and final payment being due and payable upon 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.

**PRICING**

Tonic HQ will perform the activities listed for the flat fee of **{totalAmt}** made in payments:{#payments\_two}

* 50% upon contract signing
* 50% at substantial completion and client’s acceptance of the project.{/payments\_two}{#payments\_three}
* 35% upon contract signing
* 35% upon completion of Discovery and Configuration
* 30% at substantial completion and client’s acceptance of the project.{/payments\_three}{#payments\_four}
* 30% - At contract signing
* 30% - 60 days after contract signing
* 30% - 120 days after contract signing
* 10% - At substantial completion and client’s acceptance of the project.{/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.{/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}

**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**

* We request you to carefully review the contract details to ensure clarity and understanding. We prioritize transparency as the cornerstone of our partnership
* Upon comprehending all details and deciding to proceed, kindly sign the document either physically or electronically.

If there's anything unclear or if you want to discuss any points, please let us know. We're here to create the best working relationship possible. Once we receive your acceptance, we'll be in touch to discuss next steps and initiate the project. Please don't hesitate to call us at (559) 412-5240 if you prefer a phone conversation.

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

{#ats\_essentials}

**Front Office / Back Office:**

**Essentials Implementation**

**Scope of Work**

**SCOPE OF IMPLEMENTATION**

* Consulting
* Detailed documentation on Tonic HQ’s suggested configuration and data migration tailored for your product package to be provided for review.
* 1.5 hour session with Implementation Consultant to advise on configuration decisions.
* 1 hour session with Data Analyst to advise on data migration decisions.
* Assistance with understanding of all project workbook items to ensure accurate and timely delivery from Client.
* Configuration
* Customizations to the available fields and/or values to tailor the system to client’s needs as determined by client will be configured.
* Five (5) custom fields can be added per entity (Lead, Opportunity, Contact, Company, Candidate, Job, Placement)
* The values of any fields with listed values can be updated for existing fields.
* Includes **{plCount}** private label(s){^NoDataMigration}
* Data Migration
* Assist Client with the process of acquiring a complete data export from current software provider.
* 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 for all existing and client custom fields configured:
* 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}
* Testing
* 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.
* 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.
* Recorded trainings provided throughout the project to build Client’s Bullhorn knowledge.
* 2 live training sessions covering the daily practices your team will carry out within Bullhorn focusing on recruiting and sales roles.
* 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.{#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 completes all necessary project workbook items by determined due dates.
* 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}{#oscpOption}

**OPEN SOURCE CAREER PORTAL (OPTIONAL)**

|  |  |
| --- | --- |
| Shape\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)**

|  |  |
| --- | --- |
| Shape\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)**

|  |  |
| --- | --- |
| Shape\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{/ats\_essentials}{#ats}

# **Front Office / Back Office:**

# **Implementation**

# **Scope of Work**

**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.
* 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}{#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}{#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{/ats}{#autoEss}

# **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.

|  |  |  |
| --- | --- | --- |
| **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. |
|
|
| 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. |
|
| 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. |
|
| 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

{/autoEss}{#autoInt}

# **Automation:**

# **Intermediate 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 33 hours and to be completed within **11-13 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.

|  |  |  |
| --- | --- | --- |
| **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. |
|
|
| 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. |
|
| Week 6 | “Build 5” Workshop | Hands-on build of 2 new Automations. Client will  “activate” automations created in previous Build  workshops. 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 | “Build 6” Workshop | Hands-on build of 3 new Automations. Client will  “activate” automations created in previous Build  workshops. This will be a 60 min online meeting. |
| Client completion | Client will complete 3 more custom automations  and determine use cases for custom  automations. |
| Week 8 | “Build 7” Workshop | Hands-on build of Custom (non BP) automation -  2 Automations. Client will “activate” automations  created in previous Build workshops. This will be  a 60 min online meeting. |
| Client completion | Client will complete 2 more custom automations. |
| Week 9 | “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 10 | Adoptions Metrics Review | This will be a 30 min online meeting. |
| Week 11 | 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 2  account reviews 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 for  each review. |
| 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

{/autoInt}{#autoAdv}

# **Automation:**

# **Advanced 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 45 hours and to be completed within **14-17 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.

|  |  |  |
| --- | --- | --- |
| **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. |
|
|
| 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. |
|
| Week 6 | “Build 5” Workshop | Hands on build of 3 new Automations. Client will  “activate” automations created in previous Build  workshops. This will be a 60 min online meeting. |
| Client Completion | Client will complete 3 more custom  automations. |
| Week 7 | “Build 6” Workshop | Hands on build of 3 new Automations. Client will  “activate” automations created in previous Build  workshops. This will be a 60 min online meeting. |
| Client Completion | Client will complete 3 more custom  automations and determine use cases for  custom automations. |
| Week 8 | “Build 7” Workshop | Hands-on build of Custom (non BP) automation -  2 Automations. Client will “activate” automations  created in previous Build workshops. This will be  a 60 min online meeting. |
| Client Completion | Client will complete 2 more custom  automations. |
| Week 9 | “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 |
| Activation | Client will “activate” automations created in previous Build workshops. |
| Week 10 | “Build 8” Workshop | Hands on build of 3 new Automations. Client will  “activate” automations created in previous Build  workshops. This will be a 60 min online meeting. |
| Client Completion | Client will complete 3 more custom  automations. |
| Week 11 | “Build 9” Workshop | Hands on build of 2 new Automations. Client will  “activate” automations created in previous Build  workshops. This will be a 60 min online meeting. |
| Client Completion | Determine use cases for custom automations. |
| Week 12 | “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 13 | Adoptions Metrics Review | This will be a 30 min online meeting. |
| Week 14 | 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 4  account reviews throughout the first 12 months  of service and will consist of analyzing usage  and automations. The findings will be presented  over the course of a 1-hour call for each account  review. |
| 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

**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.{/autoAdv}{#autoTra}

# **Automation:**

# **Transformed 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 65 hours and to be completed within **18-21 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.

|  |  |  |
| --- | --- | --- |
| **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. |
|
|
| 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. |
|
| Week 6 | “Build 5” Workshop | Hands on build of 3 new Automations. Client will  “activate” automations created in previous Build  workshops. This will be a 60 min online meeting. |
| Client Completion | Client will complete 3 more custom  automations. |
| Week 7 | “Build 6” Workshop | Hands on build of 3 new Automations. Client will  “activate” automations created in previous Build  workshops. This will be a 60 min online meeting. |
| Client Completion | Client will complete 3 more custom  automations and determine use cases for  custom automations. |
| Week 8 | “Build 7” Workshop | Hands on build of Custom (non BP) automation  - 2 Automations. Client will “activate”  automations created in previous Build  workshops. This will be a 60 min online meeting. |
| Client Completion | Client will complete 2 more custom  automations. |
| Week 9 | “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 |
| Activation | Client will “activate” automations created in previous Build workshops. |
| Week 10 | “Build 8” Workshop | Hands on build of 3 new Automations. Client will  “activate” automations created in previous Build  workshops. This will be a 60 min online meeting. |
| Client Completion | Client will complete 3 more custom  automations. |
| Week 11 | “Build 9” Workshop | Hands on build of 2 new Automations. Client will  “activate” automations created in previous Build  workshops. This will be a 60 min online meeting. |
| Client Completion | Determine use cases for custom automations. |
| Week 12 | “Build 10” Workshop | Hands on build of 1 new Automations. Client will  “activate” automations created in previous Build  workshops. This will be a 60 min online meeting. |
| Client Completion | Client will complete 4 more custom  automations. |
| Week 13 | “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. |
| Activation | Client will “activate” automations created in  previous Build workshops. |
| Week 14 | “Build 11” Workshop | Hands on build of 1 new Automation. Client will  “activate” automations created in previous Build  workshops. This will be a 60 min online meeting. |
| Client Completion | Client will complete 5 more custom  automations. |
| Week 15 | “Build 12” Workshop | Hands on build of 1 new Automation. Client will  “activate” automations created in previous Build  workshops. This will be a 60 min online meeting. |
| Client Completion | Client will complete 5 more custom  automations. |
| Week 16 | “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. |
| Week 17 | Adoptions Metrics Review | This will be a 30 min online meeting. |
| Week 18 | 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 10  account reviews throughout the first 12 months  of service and will consist of analyzing usage  and automations. The findings will be presented  over the course of a 1-hour call for each account  review. |
| 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

**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.{/autoTra}{#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.{/onbTalentEss}{#onbTalentInt}

# **Onboarding Talent Edition:**

# **Intermediate**

# **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 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:
  + 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 **15-16 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 (150). |
|  |  |
|  | 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 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) |
|
|
| 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. |
|
| 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) |
|
| 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) |
|
| 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. {/onbTalentInt}{#talentPlatformEss}

# **Talent Platform:**

# **Essentials**

# **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 Able 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 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:
  + **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.

**TIMELINE**

Assuming no scope changes, Tonic HQ estimates **19 - 21 weeks** from our Kick-Off Callto Go Live. Tonic HQ will provide regular status reports and project updates.

|  |  |  |
| --- | --- | --- |
| Timeline | Milestone | Activities |
| Week 1 - 2 | Project Kick Off | **Able**: Overview of project timeline, integration inclusions, project teams, goals and action items.  **Automation**: “Setting up for Success: The Fundamentals of Bullhorn Automation”.  (30 min) |
| Technical Set up | **Able**: new Staging instance created prior to kickoff  **Automation**: Data sync, email domain\*, SMS provisioning\*, a custom tab and a custom field in the Bullhorn ATS & CRM. |
| Client completion | **Able**:   * 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.   **Automation**: Client will complete a subset of the self-paced eLearning modules within 3 days of kickoff. |
| Tonic HQ completion | **Able**: Form Audit of 50 client forms (5 hours) |
| Week 3 - 4 | Form / Package Build  Training | **Able**: 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. |
| Automation “Build 1”  workshop | **Automation**: 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 5 | 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 6 - 7 | Configuration  workshop 1 | **Able**: 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 | **Able**: Intro to BH field mapping to forms This will be a 90 min online meeting. |
| Client completion | **Able**: 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 8 - 9 | Admin Training | **Able**: Full system overview of Able 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 10 - 11 | 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) |
| Able: Configuration workshop 3 | **Able**: Review Pre-hire category-based configurations and placement automation. (90 min) |
| Client completion | **Able**: Client will complete outstanding tasks from previous workshops.  **Automation**: Client will create one automation and determine use cases for custom automations. |
| Week 12 - 13 | “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 | **Able**: Review of config, settings, forms, and prep  for UAT (60 min). |
| Client completion | **Able**: Client will update/complete the Mapping Document.  **Automation**: Client will complete outstanding tasks from previous workshops prior to Build 4 workshop. |
| Week 14 - 15 | “Build 4” workshop | **Automation**: 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.  (90 min) |
| Client completion | **Able**: 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 16 - 18 | UAT | **Able**: 1 week initial UAT: Client will create a 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. |
| UAT Fixes | **Able**: Client / BH updating forms, bug triage, etc. |
| End to End UAT | **Able**: Final review |
| Week 19 | User Training | **Able**: Navigation of BH and Able 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 | **Able**: 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.  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.{/talentPlatformEss}{#talentPlatformInt}

# **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.

|  |  |  |
| --- | --- | --- |
| 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. {/talentPlatformInt}