# 

# 

X

# **Implementation SoW - Conventus X SS**

Prepared By: Vino Geoffrey

## 

# **Index**

[1. Company Overview 2](#_fya9dy2mhgxi)

[2. Use Case Introduction 3](#_wchwiv486spy)

[3. Solution Requested 3](#_z0ewfjlfrhp)

[4. Implementation Scope Overview 3](#_9pyh6qykutbv)

[4.1. Deliverables / Implementation Scope Items 3](#_f9dowvbved58)

[4.2. Product Feature Scope 3](#_1a6twpmhexh3)

[5. Signoff 4](#_36gsa23imdfx)

# **Implementation Scope of Work - Document**

Prepared For: Conventus

Prepared By: Vino Geoffrey

## 

## **1. Company Overview**

| **Section** | **Details** |
| --- | --- |
| Client Name | Sarah Assalino |
| Date | 13/02/25 |
| Original Scope Ref | NA |

## **2. Use Case Introduction**

They aim to send an NPS survey to all existing customers, with the survey being triggered from Salesforce once the customer's lifecycle stage reaches "booked." Ideally, the survey should be sent five days after this status update. Customer contacts, along with relevant Salesforce fields, will be synced to SurveySparrow to facilitate reporting.

For survey creation, display logic should be implemented to present follow-up questions to respondents who provide low scores, helping to understand the reasons behind their feedback. Initially, the surveys will be deployed at specific touchpoints, with potential expansion over time. Additionally, there is a use case where tickets will be automatically created in Salesforce for low-score responses and assigned to relevant stakeholders for follow-up.

Survey responses should be synced back to Salesforce for reporting, and survey throttling should be implemented to prevent customers from receiving excessive surveys. Lastly, the platform should be white-labeled with their domain for a seamless brand experience. They would also be testing out SMS sharing method for which we have given them 10k free SMS.

## **3. Solution Requested**

Surveys should be designed according to customer preferences, incorporating display logic, white labeling, and custom branding. Additionally, integration with Salesforce will be initiated through SurveySparrow to seamlessly sync responses for reporting purposes. Reports will be generated based on various parameters such as demographics, loan details, and other relevant data. This approach ensures a personalized survey experience while enabling efficient data synchronization and analysis. By leveraging these features, organizations can enhance customer engagement, streamline data collection, and gain valuable insights for informed decision-making, ultimately improving overall survey effectiveness and reporting accuracy.

## **4. Implementation Scope Overview**

Surveys should be designed for customer convenience, ensuring a seamless experience. Integration between Salesforce and SurveySparrow will enable surveys to be triggered based on specific Salesforce events. Once responses are received, they will be automatically synced back to Salesforce for reporting and analysis. This integration enhances data accuracy, streamlines feedback collection, and provides valuable insights for decision-making. By aligning surveys with customer interactions and automating response synchronization, organizations can improve engagement, track key metrics, and optimize their feedback strategy effectively. This approach ensures efficient data management while leveraging Salesforce for comprehensive reporting and analysis.

## 

## **4.1. Deliverables / Implementation Scope Items**

| **Deliverable ID** | **Deliverable Description** | **Original Due Date** | **Revised Due Date** | **Status** |
| --- | --- | --- | --- | --- |
| Deliverable 1 | Survey Creation | [Original Date] | [Updated Date] | [Not Started/In Progress/Completed] |
| Deliverable 2 | Salesforce Integration | [Original Date] | [Updated Date] | [Not Started/In Progress/Completed] |
| Deliverable 3 | Report creation | [Original Date] | [Updated Date] | [Not Started/In Progress/Completed] |

## **4.2. Product Feature Scope**

| **Sr.No.** | **Feature Name** | **Description** | **Inscope or out-of-scope** | **Comments** |
| --- | --- | --- | --- | --- |
| 1 | Survey Creation | [Original Date] | In Scope |  |
| 2 | Salesforce Integration | [Original Date] | In Scope |  |
| 3 | Reports | [Original Date] | In Scope |  |

**4.3. Plan Details**

| **Sr.No.** | **Plan** | **Number of users** | **Pricings (in $)** | **Exclusions** |
| --- | --- | --- | --- | --- |
| 1 | Enterprise Advance | 5 | 14588 | NA |

## **5. Signoff**

| **Party** | **Name** | **Title/Role** | **Date** | **Sign Off** |
| --- | --- | --- | --- | --- |
| Sales Team | Vignesh Narasimhan | RSM | [Date of Agreement] | Approved |
| Solution Engineering(SS) | Vino Geoffrey | Solution Engineer | [Date of Agreement] | Approved |