Statement of Work
Salesforce Campaign Management Implementation

1. PROJECT OVERVIEW

No project description provided.

2. SCOPE OF WORK

This Statement of Work outlines the deliverables and services to be provided for the Salesforce Campaign Management Implementation project. It includes detailed requirements, implementation tasks, acceptance criteria, timeline, and costs.

3. REQUIREMENTS

Requirement 1: Campaign ROI Reporting and Analytics

The Salesforce implementation must provide robust reporting and analytics capabilities for measuring campaign ROI. This includes automatically calculating and displaying key metrics such as the number of opportunities associated with a campaign, pipeline generated, closed won/lost opportunities and their respective values, and overall ROI. These metrics should be available at both the individual campaign level and rolled up to the parent campaign level, providing a comprehensive view of performance across the entire hierarchy. The system should eliminate the need for manual data exports and calculations, providing real-time access to campaign performance data. Dashboards should be created to visualize key metrics, including campaign hierarchy performance comparison, opportunity conversion rates by campaign type, ROI by campaign channel, and trend analysis over time.

Requirement 2: Historical Campaign Data Migration

The Salesforce implementation must include the migration of historical campaign data from the client's legacy system. This data should include campaign details, hierarchies, campaign member data, associated opportunities and their outcomes, and any custom fields relevant to the client's business. The migration should cover at least the last 2-3 years of campaign data to ensure reporting continuity. The data mapping process should accurately translate the legacy system's structure to Salesforce's campaign objects, preserving the integrity of historical campaign performance data. This migrated data should be readily accessible within Salesforce for reporting and analysis.

Requirement 3: Campaign Hierarchy Support

The Salesforce implementation must support a hierarchical structure for campaigns, mirroring the existing "program tree" concept currently used. This hierarchy should allow for the organization and management of campaigns at different levels, enabling roll-up reporting and aggregation of performance metrics from individual campaigns up to higher-level programs. The system should allow for the creation, editing, and viewing of campaigns within this hierarchical structure, ensuring that relationships between parent and child campaigns are clearly defined and maintained. This structure should be flexible enough to accommodate future changes in the organization's campaign structure and should provide a clear and intuitive way to navigate and manage the relationships between different campaigns.

Requirement 4: Opportunity Reporting and Dashboarding

The system must provide robust reporting and dashboard capabilities for opportunity management. This includes standard pipeline reports and dashboards that can be customized to meet executive reporting needs. These reports should display key metrics such as total value of deals at each stage, forecasted close dates, and probability of closing. The system should support time-based pipeline views (e.g., monthly, quarterly) and trending reports to track pipeline growth and changes over time. Reports and dashboards should be automatically refreshed to ensure data accuracy and eliminate manual report generation. The system should allow filtering of opportunity data by various dimensions, including product line, region, account type, industry, deal size, and other relevant fields. Different report versions should be configurable for different stakeholders, allowing for tailored views based on role and responsibilities (e.g., CEO vs. Regional Sales Director).

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Requirement 5: Mobile Access to Reports and Dashboards

Sales managers and executives require access to opportunity reports and dashboards on mobile devices. The Salesforce implementation must provide a mobile-responsive interface for accessing these reports and dashboards, ensuring that key performance metrics are readily available regardless of location. This mobile access should provide the same level of functionality and data visibility as the desktop version, allowing users to view, filter, and interact with reports and dashboards on their mobile devices.

Requirement 6: Customizable Opportunity Stages

The Salesforce implementation must allow for full customization of opportunity stages to mirror the existing 5-stage sales pipeline. For each stage, the system must allow configuration of the following: Stage Name (e.g., Prospecting, Qualification, Proposal, Negotiation, Closed Won), Probability Percentage (reflecting the likelihood of closing the deal at that stage), Stage Status (Open, Closed Won, or Closed Lost), and any automated actions that should be triggered when an opportunity reaches that stage (e.g., sending notifications, updating other fields, creating tasks). This customization should be easily managed within Salesforce and should not require custom development. The system should also provide reporting and analysis capabilities based on these custom stages, allowing for accurate tracking of sales progress and performance.

Requirement 7: Robust Sales Forecasting Capabilities

The Salesforce implementation must provide robust sales forecasting functionality. This includes the ability for sales managers to view aggregated forecasts from their teams and adjust projections based on their judgment. The system should support multiple forecast categories (e.g., Pipeline, Best Case, Commit, Closed) and provide override capabilities for managers. Forecast history tracking is required to analyze how projections change over time. This historical data should be readily accessible for reporting and analysis. The forecasting functionality should integrate seamlessly with opportunity management and provide real-time updates as opportunities progress through the sales pipeline.

Requirement 8: Campaign-Opportunity Association and Automation

The Salesforce implementation must enable the association of opportunities with campaigns, automating this process as much as possible. The system should support multiple campaign influence models, including Primary Campaign Source, Campaign Influence (with customizable attribution percentages), and Customizable Campaign Influence. Automation rules should be implemented to automatically link campaigns to opportunities based on lead activity, such as webinar attendance or email opens. The system should also allow for manual association of campaigns to opportunities by sales representatives, providing flexibility for situations where automation is not feasible. The chosen approach should minimize manual effort for the sales team while maintaining accuracy in campaign attribution.

Requirement 9: Campaign Security and Access Control

The Salesforce implementation must enforce granular security and access control for campaigns. Different user profiles should have varying levels of access, aligned with their roles and responsibilities. Marketing managers should have permission to create and edit parent campaigns, while marketing coordinators should be restricted to creating and editing child campaigns within existing hierarchies. Sales teams and executives should have view-only access to campaign hierarchies and details. Salesforce's profile and permission set system should be leveraged to implement these access controls, ensuring data security and preventing unauthorized modifications to campaign data.

Requirement 10: Campaign Permissions Management

The system must provide granular control over user permissions related to campaign management. Different user roles should have varying levels of access, such as the ability to create and edit campaigns, or only view campaign data. This ensures data integrity and prevents unauthorized modifications. The permission structure should be configurable to align with the organization's existing roles and responsibilities. This includes the ability to restrict access to specific campaigns or branches within the campaign hierarchy based on user roles or other criteria. The system should also provide clear audit trails of campaign changes, indicating who made the changes and when.

Requirement 11: Restrict Opportunity Creation to Sales Team

The Salesforce implementation must restrict the creation of new opportunities to designated sales team members only. This is crucial to maintain data quality and prevent non-sales personnel from creating unqualified opportunities. Specifically, "Create" permission on the Opportunity object should be granted only to profiles associated with sales roles (e.g., Account Executives, Sales Managers). All other user profiles (e.g., Marketing, Support, Finance) should have "Read Only" access to opportunities, ensuring company-wide visibility while preventing unauthorized creation or modification. The system should not display the "New Opportunity" button to users without create permissions. This restriction should apply to all methods of opportunity creation, including manual entry through the user interface, data imports, and API integrations.

Requirement 12: Win Rate Reporting and Analysis

The Salesforce implementation must provide comprehensive win rate reporting and analysis capabilities. This includes calculating and displaying win rates at both the company level and for individual sales representatives. Reports should show the percentage of won opportunities compared to total closed opportunities (won and lost), including both the count and value of won/lost opportunities. The system should allow for analysis of win rate trends over time, including month-over-month and quarter-over-quarter changes, as well as historical comparisons. Visualizations, such as charts, should be available to highlight trends and identify areas for improvement. Multidimensional analysis of win rates should be supported, allowing segmentation by factors such as deal size, industry, lead source (e.g., marketing vs. sales generated), product line, and sales cycle length. This analysis should provide insights into factors influencing win rates and inform sales strategies.

Requirement 13: Required Fields for Opportunity Creation

To ensure data consistency and completeness, certain fields must be mandatory when creating new opportunities in Salesforce. These required fields should include, at minimum: Opportunity Name, Account, Amount, Close Date, Stage, and Product/Service Category. The system should enforce these requirements and prevent users from saving a new opportunity record unless all required fields are populated. The specific required fields may be adjusted based on further analysis and business needs, but these core fields are essential for basic opportunity tracking and reporting.

Requirement 14: Opportunity Ownership and Assignment

The Salesforce implementation must clearly define opportunity ownership and provide automated assignment capabilities. Each opportunity must have a designated owner, typically the sales representative responsible for the deal. Ownership should determine responsibility for updating the opportunity, whose sales forecast the opportunity contributes to, and how it factors into commission calculations. The system should support automated assignment rules based on criteria like territory, product line, or account ownership, ensuring opportunities are routed to the correct sales representative efficiently. Manual reassignment capabilities should also be provided for exceptional cases. Clear visibility of opportunity ownership should be available throughout the system, including reports and dashboards.

Requirement 15: Comprehensive Pipeline Reporting

The Salesforce implementation must provide comprehensive pipeline reporting with multiple dimensions and filters. This includes the ability to track win rates at both the company level and by individual sales representatives. Reports should be customizable to allow users to select relevant data points and timeframes. The system should also offer the ability to analyze performance trends over time and by various factors such as product, region, or sales team. These reports should be easily accessible and exportable to various formats (e.g., CSV, Excel) for further analysis.

Requirement 16: Scheduled Report Delivery

The Salesforce implementation must allow for automated scheduling and delivery of reports and dashboards. Users should be able to define the frequency (e.g., daily, weekly, monthly) and delivery method (e.g., email) for reports. The system should support distribution to multiple stakeholders, including sales managers, executives, and other relevant personnel. This automation will reduce the manual reporting burden on the sales team and ensure timely access to key performance indicators.

Requirement 17: Opportunity Access Control

The Salesforce implementation must restrict opportunity creation to sales team members while providing view access to all company employees. This ensures data integrity and prevents unauthorized modifications to opportunity records. The system should utilize Salesforce's built-in security and sharing model to manage these access controls. Different levels of view access may be implemented based on roles and responsibilities within the organization, while maintaining the restriction on record creation to the sales team.

Requirement 18: Campaign Hierarchy Management

The Salesforce implementation must support the creation and management of campaign hierarchies, mirroring the client's existing "program tree" structure. This includes the ability to create parent-child relationships between campaigns, allowing for multiple levels of nesting. The system should accurately reflect the relationships between overarching marketing initiatives (e.g., "Q1 Product Launch") and their constituent sub-campaigns (e.g., email blasts, webinars, social media campaigns). This hierarchical structure should be visible throughout the system, enabling users to understand the overall marketing strategy and the contribution of individual campaigns to larger initiatives. The system should also allow for the easy navigation and exploration of these hierarchies by users with appropriate permissions.

Implementation Tasks:

- Create Campaign object hierarchy (4 hours)

- Implement Campaign hierarchy validation (6 hours)

- Build Campaign hierarchy UI (24 hours)

- Test Campaign hierarchy functionality (12 hours)

- Set up Campaign hierarchy reporting (8 hours)

Acceptance Criteria:

- Given a user with appropriate permissions
When the user creates a new campaign
And the user specifies a parent campaign
Then the new campaign is created as a child of the specified parent
And the camp...

• Given an existing campaign hierarchy with parent and child campaigns
When the user updates the parent campaign of a child campaign
Then the campaign hierarchy is updated accordingly
And the new parent...

• Given a user with appropriate permissions
When the user navigates to the campaign hierarchy view
Then the user can see all parent-child campaign relationships
And the user can easily explore and navig...

• Given a user with appropriate permissions
When the user attempts to create a new campaign with a non-existent parent campaign
Then the system should display an error message
And the new campaign shoul...

• Given an existing campaign hierarchy
When the user attempts to set a child campaign as the parent of an existing parent campaign
Then the system should display an error message
And the parent-child re...

Requirement 19: Campaign Performance Metrics Roll-up

The Salesforce implementation must automatically roll up key performance metrics through the campaign hierarchy. This allows for a consolidated view of campaign performance at different levels, from individual campaigns to overall programs. The roll-up should include metrics such as the number of leads generated, opportunities created, and revenue generated. This aggregated data should be readily available through dashboards and reports, providing a comprehensive overview of campaign effectiveness across the entire organization. The system should also allow for drill-down functionality, enabling users to view detailed performance data for individual campaigns within the hierarchy.

Acceptance Criteria:

• Given the campaign hierarchy has been set up correctly
When I view the campaign performance dashboard
Then I should see the aggregated metrics for the entire campaign program, including the number of ...

• Given I am viewing the campaign performance dashboard
When I click on a specific campaign in the hierarchy
Then I should see the detailed performance data for that individual campaign

• Given a new campaign has been created
When the campaign is added to the hierarchy
Then the campaign performance dashboard should reflect the updated metrics, including the new campaign's contribution ...

• Given a campaign has been deleted from the hierarchy
When I view the campaign performance dashboard
Then the aggregated metrics should no longer include the deleted campaign's data

• Given a campaign is missing required performance data
When I view the campaign performance dashboard
Then I should see an error message indicating the missing data and the affected campaign

4. TIMELINE AND MILESTONES

Project Start: 4/15/2025
Estimated Completion: 7/14/2025

Key Milestones:
• Requirements Finalization: 4/29/2025
• Development Phase: 5/30/2025
• Testing and QA: 6/29/2025
• Final Delivery: 7/14/2025

5. COSTS AND PAYMENT

Item	Amount
Total Estimated Hours	54 hours
Hourly Rate	$150/hour
Total Estimated Cost	**$8,100**