Statement of Work
Mike's Project

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 Mike's Project project. It includes detailed requirements, implementation tasks, acceptance criteria, timeline, and costs.

3. REQUIREMENTS

Requirement 1: 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 reflect the client's current organizational structure, allowing marketing managers to create parent campaigns (major initiatives like "Q1 Product Launch") and marketing coordinators to create child campaigns (specific marketing activities like email blasts or webinars) within those established hierarchies. The hierarchy should accurately reflect the relationships between overarching marketing initiatives and their constituent activities, enabling clear tracking and reporting on performance at both the individual campaign and overall initiative levels. This functionality should be intuitive and easy to use, improving upon the client's current clunky system.

Requirement 2: Historical Campaign Data Migration

The Salesforce implementation must include the migration of historical campaign data from the client's legacy system. This migration should encompass at least the last 2-3 years of data to maintain reporting continuity and preserve historical ROI metrics. The data migration should include campaign details, hierarchies, campaign member data (participants), associated opportunities and their outcomes, and any custom fields relevant to the client's business needs. The implementation team must develop a mapping strategy to ensure accurate transfer of data between the legacy system's structure and Salesforce's campaign objects. This migration will allow the client to retain valuable historical insights and maintain a consistent view of campaign performance over time.

Requirement 3: Campaign Visibility and Security

The system must provide granular control over campaign visibility and access permissions. Marketing managers should have full access to create and manage parent campaigns, while marketing coordinators should have permission to create child campaigns within existing hierarchies. Sales teams and executives should have view-only access to campaign structures and data, enabling them to understand marketing strategy without the ability to create or modify campaigns. This access control should be implemented using Salesforce's profile and permission set system, ensuring that data is protected and users only have access to the information relevant to their roles. This granular control aligns with the client's existing security requirements and prevents unauthorized modifications to campaign data.

Requirement 4: Campaign-Opportunity Association and Automation

The system must enable the association of opportunities with campaigns, automating this process as much as possible to reduce manual effort and improve data accuracy. This includes supporting multiple campaign influence models, including Primary Campaign Source (single campaign attribution), Campaign Influence (multiple campaigns with customizable attribution percentages), and Customizable Campaign Influence (multiple simultaneous attribution models). The system should automate the linking of campaigns to opportunities based on lead activity, such as automatically associating a webinar campaign with an opportunity if the prospect attended that webinar. The automation should be flexible enough to handle scenarios where prospects engage with multiple campaigns before converting to an opportunity, accurately attributing influence based on the chosen model. This automation will significantly improve the client's current process, where sales reps manually tag opportunities with campaigns, often leading to inaccuracies and omissions.

Requirement 5: 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 analysis. Each level within the hierarchy should be clearly defined and easily navigable within the system. The system should allow for campaigns to be nested within parent campaigns, reflecting the relationships between broader marketing programs and their constituent campaigns. This structure should facilitate the tracking of overall program performance as well as the effectiveness of individual campaigns within those programs. The migration process should ensure that the existing program tree structure is accurately mapped and transferred into the Salesforce hierarchy, preserving the relationships between campaigns.

Requirement 6: Campaign Permission 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 creating, editing, and viewing campaigns. This ensures data integrity and restricts unauthorized modifications. The system should allow administrators to define specific permissions for different user groups or individual users. For example, sales representatives might have view-only access to campaign details, while marketing managers would have full create, edit, and delete permissions. This granular control over permissions should be configurable and easily managed within the Salesforce administration interface. The implementation should also consider the existing user roles and permissions within the current system and map them appropriately to the Salesforce roles and permission structure.

Requirement 7: Automated Campaign Influence Tracking

Salesforce must automatically track prospect interactions with campaigns and attribute them appropriately. This includes tracking multiple touchpoints across different campaigns and attributing credit based on configurable attribution models. The system should support various attribution models, such as first-touch, last-touch, and other custom models, allowing the business to define how credit is assigned for conversions. The automation should minimize manual effort required by the sales team to track campaign influence and ensure accurate attribution of opportunities to the appropriate campaigns. This automated tracking should be seamlessly integrated with opportunity management within Salesforce, providing a clear view of which campaigns are contributing to successful conversions. The system should also provide detailed reporting on campaign influence, showing the contribution of each campaign to the sales pipeline.

Requirement 8: Campaign Performance Metrics Roll-up

The system must automatically roll up campaign performance metrics through the defined hierarchy. This allows for aggregated reporting and analysis at different levels, providing a comprehensive view of campaign effectiveness. Metrics such as cost, revenue, ROI, and conversion rates should be aggregated and displayed at each level of the hierarchy. This roll-up functionality should provide a clear picture of the performance of individual campaigns as well as the overall performance of parent campaigns and programs. The system should allow users to drill down from higher levels of the hierarchy to view detailed performance metrics for individual campaigns. This hierarchical reporting should be easily accessible and customizable to meet the specific reporting needs of the marketing team and executive management.

Requirement 9: 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 opportunity creation methods, including manual creation through the user interface, API integrations, and data imports. A formal lead assignment process should be implemented for marketing or other departments to hand off qualified leads to the sales team for opportunity conversion.

Requirement 10: Comprehensive Opportunity Reporting and Dashboards

The Salesforce implementation must provide robust reporting and dashboard capabilities for opportunity management. These reports should offer real-time insights into the sales pipeline, including the total value of deals at each stage, forecasted close dates, and probability of closing. The system should support customizable dashboards that can be tailored to the specific needs of different stakeholders, such as the executive team, sales managers, and individual sales representatives. Standard pipeline reports and dashboards should be configured to align with the client's existing reporting requirements. The system should enable filtering and segmentation of opportunity data by various criteria, including product line, region, account type, industry, deal size, and other relevant dimensions. Automated report generation and refresh functionality should be implemented to ensure data accuracy and eliminate manual reporting processes. The reports and dashboards should be accessible from both desktop and mobile devices.

Requirement 11: Required Fields for Opportunity Creation

The Salesforce implementation must enforce required fields during opportunity creation to ensure data consistency and completeness. At a minimum, the following fields should be mandatory when creating a new opportunity: Opportunity Name, Account, Amount, Close Date, Stage, and Product/Service Category. The system should prevent users from saving a new opportunity record if any of these required fields are missing. The specific required fields may be adjusted based on further analysis and client feedback, but these core fields are essential for basic opportunity tracking and reporting. The system should provide clear error messages to users if required fields are not populated, guiding them to complete the necessary information before saving the opportunity record. This requirement aims to improve data quality and enable accurate reporting and analysis.

Requirement 12: Detailed Win Rate Reporting and Analysis

The Salesforce implementation must provide comprehensive win rate reporting and analysis capabilities. The system should calculate and display win rates at both the company level and for individual sales representatives. Win rate calculations should be based on the ratio of won opportunities to total closed opportunities (won and lost). Reports should include both the count and value of won and lost opportunities. The system should enable filtering and segmentation of win rate data by various factors, such as deal size, industry, lead source (e.g., marketing-generated, sales-generated), product line, and sales cycle length. Historical trend analysis should be available to track win rate changes over time, including month-over-month, quarter-over-quarter, and year-over-year comparisons. Visualizations, such as charts and graphs, should be used to highlight trends and performance insights. These reports should be accessible to sales management and executives to monitor performance and identify areas for improvement.

Requirement 13: Customizable Opportunity Stages

The system 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: 1. Stage Name (e.g., Prospecting, Qualification, Proposal, Negotiation, Closed Won), 2. Probability Percentage (representing the likelihood of closing the opportunity at that stage), 3. Status (Open, Closed Won, or Closed Lost), and 4. Automation Triggers (actions to be automatically performed when an opportunity reaches that stage). This customization ensures the system aligns with the specific sales process and allows for accurate tracking and forecasting.

Requirement 14: Opportunity Ownership and Assignment

The system must assign a designated owner to each opportunity, typically the responsible sales representative. Ownership should determine: 1. Responsibility for updating the opportunity record, 2. Inclusion in the owner's sales forecast, and 3. Impact on commission calculations (if applicable). The system should also support automated assignment rules based on criteria like territory, product line, or account ownership, ensuring efficient and accurate opportunity allocation.

Requirement 15: Robust Sales Forecasting Capabilities

The system must provide robust sales forecasting functionality, enabling sales managers to view aggregated team forecasts and adjust projections based on their judgment. The system should support: 1. Multiple forecast categories (e.g., Pipeline, Best Case, Commit, Closed), 2. Override capabilities for managers to modify forecasts, and 3. Forecast history tracking to monitor changes over time. This provides sales leadership with accurate revenue projections and insights into pipeline health.

Requirement 16: Comprehensive Pipeline Reporting

The system 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, analyze performance trends over time, and segment data by various factors such as product/service category, territory, or account. The system should also support scheduled report generation and automated email distribution to stakeholders, reducing manual reporting efforts.

Requirement 17: Opportunity Access Control

The system must restrict opportunity creation to members of the sales team while providing view access to all company employees. This ensures data integrity and allows for broader visibility into sales activities and pipeline status across the organization.

Requirement 18: Mobile Access to Reports and Dashboards

The system must provide access to reports and dashboards on mobile devices, enabling sales managers and executives to monitor performance metrics and pipeline health on the go. This mobile access should provide the same level of functionality and data visibility as the desktop version, ensuring real-time access to critical information.

Requirement 19: Scheduled Report Refresh and Distribution

The system must allow for scheduling automated refreshes of reports and dashboards and their subsequent distribution via email to designated stakeholders. This automation reduces manual reporting efforts and ensures stakeholders have access to the latest data on a regular basis. The scheduling should be flexible, allowing for daily, weekly, or monthly distribution as needed.

Requirement 20: Campaign ROI Reporting and Analytics

The system must provide robust reporting and analytics capabilities for measuring campaign ROI. This includes automatically calculating and displaying key metrics within each campaign record, such as the number of associated opportunities, pipeline generated, closed won/lost opportunities and their associated values, and overall ROI. These metrics should automatically roll up through the campaign hierarchy, providing aggregated performance data at both the individual campaign and parent initiative levels. The system should eliminate the client's current manual process of exporting data to spreadsheets, providing real-time access to campaign performance data. Furthermore, the system should support the creation of customizable dashboards to visualize key performance indicators, including campaign hierarchy performance comparison, opportunity conversion rates by campaign type, ROI by campaign channel (email, event, webinar, etc.), and trend analysis over time. This will enable the marketing team to quickly assess campaign effectiveness and make data-driven decisions.

Implementation Tasks:

- Create custom campaign metrics fields (8 hours)
- Implement campaign hierarchy rollup summary fields (6 hours)
- Develop real-time metrics refresh (16 hours)
- Build campaign performance dashboard (12 hours)
- Customize campaign record page (2 hours)

Acceptance Criteria:

- Given a campaign record exists in the system
When I view the campaign details
Then I should see the following metrics automatically calculated and displayed:
- Number of associated opportunities
- Pip...

- Given a campaign hierarchy exists with parent initiatives and child campaigns
When I view the details of a parent initiative
Then I should see the aggregated performance metrics for all child campaign...

- Given a user is viewing campaign performance data
When changes are made to a campaign (e.g. new opportunities are added, deals are closed)
Then the performance metrics should update in real-time to re...

- Given a user has the necessary permissions
When the user creates a new dashboard
Then they should be able to select from a variety of pre-defined widgets to visualize key campaign performance indicato...

- Given a campaign record is missing required data (e.g. no associated opportunities, no closed won/lost information)
When the user views the campaign details
Then the system should display appropriate ...

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	44 hours
Hourly Rate	$150/hour
Total Estimated Cost	**$6,600**