Statement of Work
Stuart's Project

1. PROJECT OVERVIEW

Move a customer from Blackbaud to Salesforce

2. SCOPE OF WORK

This Statement of Work outlines the deliverables and services to be provided for the Stuart's Project project. It includes detailed requirements, implementation tasks, acceptance criteria, timeline, and costs.

3. REQUIREMENTS

Requirement 1: Opportunity View Access Control

The system must allow all company users to have view access to opportunities, while restricting opportunity creation to sales team members only. This ensures transparency and visibility across the organization while maintaining control over data entry and modification. The access control mechanism should be role-based and easily configurable by administrators.

Requirement 2: Campaign Hierarchy Management

The Salesforce implementation must support a hierarchical campaign structure, mirroring the client's existing "program tree" model. 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 for reporting and analysis purposes, enabling users to understand the contribution of individual campaigns to larger initiatives. The system must also allow for the roll-up of key metrics, such as opportunity counts, pipeline value, and ROI, from child campaigns to their parent campaigns, providing a consolidated view of performance at each level of the hierarchy.

Requirement 3: Campaign Data Migration from Legacy System

The Salesforce implementation must include the migration of historical campaign data from the client's legacy system. This data should include campaign details, hierarchies, member data, associated opportunities and their outcomes, and any custom fields relevant to the client's business. The migration should encompass at least the last 2-3 years of data to ensure continuity in reporting and analysis. A mapping process will be required to ensure accurate transfer of data between the legacy system and the Salesforce Campaign object. The migrated data should maintain the integrity of the campaign hierarchies and accurately reflect historical performance metrics.

Requirement 4: Campaign Security and Access Control

The Salesforce implementation must provide granular control over access to campaign data and functionality. Different user profiles should have varying levels of permission, aligned with their roles and responsibilities. For example, marketing managers should have full access to create and edit parent campaigns, while marketing coordinators should only be able to create and edit child campaigns within existing hierarchies. Sales teams and executives should have view-only access to campaign data and hierarchies. This access control should be implemented using Salesforce's profile and permission set system, ensuring data security and preventing unauthorized modifications to campaign records.

Requirement 5: Campaign Permission Control

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 and editing campaigns versus only viewing them. This ensures data integrity and prevents unauthorized modifications to campaign data. 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 audit trails to track changes made to campaigns and their associated permissions.

Requirement 6: Automated Campaign Tracking and Attribution

The Salesforce implementation must provide automated tracking of prospect interactions with marketing campaigns, including automatic attribution of opportunities to the appropriate campaigns. The system should support multiple attribution models, such as first-touch, last-touch, and custom models, to allow for flexible analysis of campaign effectiveness. This automation should minimize manual effort required by the sales team and provide accurate insights into which campaigns are driving conversions. The system should be able to handle scenarios where a prospect interacts with multiple campaigns before converting to an opportunity, accurately attributing credit based on the chosen model.

Requirement 7: Campaign Performance Metrics Roll-up

The system must automatically aggregate campaign performance metrics throughout the campaign hierarchy. This allows for a consolidated view of performance at different levels, from individual campaigns to parent programs and the overall marketing plan. The roll-up should include key metrics such as ROI, number of leads generated, number of opportunities created, and revenue generated. This functionality should provide a clear and concise overview of campaign effectiveness across the entire organization.

Requirement 8: Historical Campaign Data Migration

The Salesforce implementation must facilitate the migration of historical campaign data from the legacy system. This includes all relevant campaign information, such as campaign names, dates, costs, associated opportunities, and performance metrics. The migration process should ensure data integrity and accuracy, minimizing data loss or corruption. The migrated data should be seamlessly integrated into the Salesforce campaign hierarchy and reporting structure, allowing for continuity of historical analysis and reporting.

Requirement 9: Robust Sales Forecasting Capabilities

The system must provide robust sales forecasting functionality, allowing sales managers to view aggregated forecasts from their teams 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 adjust individual or team forecasts, and 3. Forecast history tracking to analyze changes in projections over time. This provides sales leadership with accurate revenue projections and insights into pipeline health.

Requirement 10: Campaign-Opportunity Association and Automation

The system must enable the association of opportunities with campaigns, including support for multiple attribution models (Primary Campaign Source, Campaign Influence, Customizable Campaign Influence). This functionality should allow for accurate tracking of which campaigns contribute to sales opportunities and their eventual outcomes. Automation capabilities are required to streamline this process, such as automatically linking campaigns associated with a lead to the resulting opportunity upon conversion. The system should also support manual association of campaigns to opportunities by sales representatives, providing flexibility for scenarios where automated linking is not sufficient. The chosen attribution model should accurately reflect the client's business processes and provide meaningful insights into the relative contribution of different campaigns to a single opportunity.

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 across all access methods, including desktop and mobile interfaces.

Requirement 12: Company-Wide Opportunity Visibility

While opportunity creation is restricted to the sales team, all employees within the company must have read access to opportunity records. This transparency is essential for cross-departmental collaboration and informed decision-making. This requirement ensures that all departments, including marketing, support, and finance, can view existing opportunities and stay informed about sales progress. This read access should include all relevant opportunity details, such as account information, opportunity amount, close date, stage, and product/service category. This visibility should be enforced consistently across all user profiles outside of the sales team, regardless of their access method (desktop or mobile).

Requirement 13: Comprehensive Pipeline Reporting and Dashboards

The system must provide robust reporting and dashboard capabilities for managing the sales pipeline. Executives require real-time visibility into the total value of deals at each stage, forecasted close dates, and the probability of closing. The system should offer standard pipeline reports and dashboards that can be customized to meet specific executive requirements. These reports should include pipeline summary dashboards showing total value by stage, time-based pipeline views displaying expected revenue by month or quarter, and trending reports illustrating pipeline growth or changes over time. Automatic report refresh functionality is essential to ensure data accuracy and eliminate manual report generation. The system should also support filtering by various criteria, such as product line, region, account type, industry, and deal size, to provide granular insights into pipeline performance.

Requirement 14: Detailed Win Rate Reporting and Analysis

The system must provide comprehensive win rate reporting at both the company level and individual sales representative level. This includes calculating the percentage of won opportunities versus lost opportunities. Reports should be able to group opportunities by owner (sales representative) and calculate win rate percentages using a formula field. Both the count and value of won and lost opportunities should be displayed. The system should also support historical trend analysis, showing month-over-month and quarter-over-quarter changes in win rates, as well as year-over-year trends by representative. Visualizations, such as charts, should be available to highlight these trends. Multidimensional analysis is required, enabling segmentation of win rates by factors like deal size, industry, lead source, product line, and sales cycle length.

Requirement 15: Required Fields for Opportunity Creation

To ensure data consistency and completeness, certain fields must be mandatory when creating new opportunities. These required fields should include, at a minimum, Opportunity Name, Account, Amount, Close Date, Stage, and Product/Service Category. Enforcing these required fields will improve data quality and facilitate accurate reporting and analysis. The system should prevent users from saving a new opportunity record unless all required fields are populated with valid data. Clear error messages should be displayed to guide users in completing the required fields. The system should also allow for customization of required fields based on evolving business needs.

Requirement 16: Mobile Access to Reports and Dashboards

Sales managers and executives require access to reports and dashboards from mobile devices. This mobile access should provide the same level of functionality and data visibility as the desktop interface. Users should be able to view pipeline summaries, win rate reports, and other key metrics on their mobile devices. The mobile interface should be optimized for different screen sizes and provide a user-friendly experience. Real-time data synchronization is essential to ensure that mobile users have access to the most up-to-date information.

Requirement 17: 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. Stage Status (Open, Closed Won, or Closed Lost), and 4. Automated Actions (any workflows or triggers that should be initiated when an opportunity reaches that stage). This customization ensures the system aligns with the specific sales process and allows for accurate tracking and reporting.

Requirement 18: Opportunity Ownership and Assignment

The system must support assigning ownership of each opportunity to a specific sales representative. Ownership should determine: 1. Primary 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 such as territory, product line, or account ownership. This ensures clear responsibility and accurate reporting of sales performance.

Requirement 19: Scheduled Report Delivery

The system should allow for scheduling and automated delivery of reports and dashboards to stakeholders via email. This automation reduces manual reporting efforts and ensures stakeholders have access to up-to-date information on a regular basis. The scheduling should be flexible, allowing for various frequencies (daily, weekly, monthly, etc.) and delivery times.

Requirement 20: Campaign ROI Reporting and Dashboards

The Salesforce implementation must provide robust reporting and dashboard capabilities for measuring campaign ROI. This includes automated calculation and display of key metrics such as number of opportunities, pipeline generated, closed won/lost opportunities and their associated values, and overall ROI. These metrics should be readily accessible within each campaign record and should automatically roll up through the campaign hierarchy. The system should also support the creation of customizable dashboards to visualize campaign performance data, including comparisons across campaigns, conversion rates by campaign type, ROI by channel, and trend analysis over time. This functionality aims to eliminate the client's current manual reporting processes, providing real-time insights into campaign effectiveness and enabling data-driven decision-making.

Implementation Tasks:

- Create custom fields on Campaign object (4 hours)
- Develop roll-up summary fields on Campaign object (6 hours)
- Build custom Lightning components for campaign metrics (16 hours)
- Implement validation rules on Campaign object (2 hours)
- Create campaign performance dashboards (12 hours)

Acceptance Criteria:

• Given a campaign is created in Salesforce
When the campaign is saved
Then the system should automatically calculate and display the following metrics:
- Number of opportunities
- Pipeline generated
- ...

• Given a parent campaign with child campaigns in Salesforce
When the child campaign metrics are updated
Then the parent campaign should automatically roll up and display the aggregated metrics

• Given a user has the necessary permissions
When the user creates a new dashboard
Then the system should allow the user to select and visualize the following campaign performance data:
- Comparisons ac...

• Given a campaign is missing required data (e.g., no opportunities, no closed won/lost values)
When the campaign is saved
Then the system should display an error message and prevent the user from savin...

• Given a campaign is updated in Salesforce
When the campaign is saved
Then the system should immediately update the campaign metrics without requiring a page refresh

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	40 hours
Hourly Rate	$150/hour
Total Estimated Cost	**$6,000**