



CU eComm program ACF Solutions Implementation Scope of Work

Preamble

- ACF serves as the “integrator” and main point of contact between CU and ACF, and the software providers - ExactTarget and Salesforce.
- CU eComm program’s requirements will be added to CU-Boulder’s already existing enterprise Salesforce org. This expansion will leverage pre-existing configurations, integrations and processes.

Objective:

The objective of this project is to implement a Salesforce-based solution that is highly scalable, usable and integrated with a suite of electronic communication tools that interface with various master CU data sources and that ultimately populates the core SFDC CRM system database with new and up-to-date data. This solution will serve the needs of communication professionals across the CU System who engage with CU’s broad and diverse audiences including alumni, donors, friends, faculty, staff, students, parents and corporations/business partners. The project scope includes, but is not limited to, the following:

- Salesforce Sales Cloud CRM
 - Provides integrated view of each constituent with the ability to update records based on permissions
 - Build upon the existing Salesforce org at CU-Boulder and leverage its integrations with CU’s student database.
 - Each constituent record will include all eComm-related information pulled from Advance (alumni, donor, corporations and friends), ISIS (students and parents), HRMS (faculty, staff and business partners) and Harris Connect (legacy eComm software with email preference and online community data) integrated with the new information generated by the rest of the Salesforce solution.
- Integrated Online Community and Directory
 - Online Community that will allow authenticated constituents (alumni, donors, students, parents and friends) to update their profile information, identify email preferences and search for other members of the CU community.
- Email marketing
 - Will provide CU communicators with cutting edge email communication tools that allow them to customize, drive, track and analyze constituent engagement.
- Integrated Event Management
 - Will allow CU communicators to create and launch dynamic event registration forms that support secure credit card transactions if required and that incorporates list generation and attendance tracking.

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NOTE: as the project proceeds, modifications may be made to this document.

PROJECT TASKS:

To complete this project, ACF Solutions will perform the following activities:

Plan and Kickoff

The ACF Solutions Delivery Manager will work with University Relations to complete up-front project planning and scheduling and will then conduct a kickoff meeting to introduce teams, review the overall implementation methodology, review roles and responsibilities for each team and outline immediate next steps. ACF will prepare a detailed project plan that will include tasks, milestones and deliverables.

Key Deliverables:

- Kickoff document
- Project plan

Analyze and Design

In this step, ACF will conduct 5 days of on-site meetings with CU staff to define and document CU's requirements and business processes while also discussing Salesforce functionality and industry best practices. The sessions will include the analyzing and design of the following for the eComm project:

- Salesforce Environment
- Email Marketing
- Event Management
- Online Community and Directory
- Data Integrations

ACF will also review and analyze CU's systems of record to understand current data structures and business processes. ACF will review the following systems:

- Harris Connect
- ISIS
- HRMS
- Advance

Once the requirements are signed off, ACF will create CU's Salesforce configuration design. This design shows how CU's requirements will be translated into a Salesforce configuration that will be user-friendly and meet CU's eComm needs. The configuration design document details the custom fields required to capture CU's data, the workflow rules needed to automate and streamline processes, the pick list values for existing Salesforce CRM fields, etc.

Key Deliverables:

- Requirements documented and signed off
- Salesforce solution design

Configure and Develop

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In this step, ACF Solutions will work with the CU eComm team, CU System's University Information System (UIS) team, CU-Boulder's Salesforce team and the campuses as applicable to expand, configure and customize Salesforce CRM, ExactTarget Marketing Cloud, roundCause Events and Online Community to meet CU's requirements as designed in the step above. ACF will make the initial eComm-specific configurations and develop the initial page layouts based on CU's requirements. CU's solution configuration will include:

Salesforce/roundCause Events

- Update Accounts and Contacts to support eComm-specific information for CU alumni, donors, friends, faculty, staff, students, parents and corporations/business partners.
- Add new custom objects and fields, update pick list values, create validation rules, update page layouts with fields/related lists/ buttons, create new record types, etc.
- Set up an overall Online Community leveraging Salesforce authentication
- Configure campaign management for mass email communications
- Implement roles and profiles for internal and user security
- Provide up to 10 customized reports and 2 dashboards
- Configure roundCause Events with 2-3 event templates
- Configure Qualtrics Survey and create 4-5 template forms to be re-used by all units

Salesforce ExactTarget Marketing Cloud

- Activate Enterprise 2.0
 - Setup of one Enterprise 2.0 Account (provision account)
 - Creation of three user roles
 - Configuration of one Sender Profile
 - Configuration of two Delivery Profiles
 - Configuration of standard reply mail management (RMM) (assume includes 2 IP setup and branding and sender authentication)
 - Test-send walkthrough. This includes:
 - Build of email from HTML provided by CU
 - Loading of a list into ExactTarget and Walkthrough of user Initiated email send process
- Creation of Campus/Business Units and User Accounts
 - Create and configure up to 10 Campus/Business Units
 - Create and configure up to 50 user accounts
- ExactTarget IP Warming – RightStart – Advanced
Strategic expert services to support delivery success including IP warm-up coupled with high-level monitoring to identify any hidden data, content, engagement, or reputation issues that could potentially keep CU from building a positive sender reputation
Activities Include:
 - Bounce monitoring
 - Identify/troubleshoot ISP blocks
 - SMTP log analysis
 - Blacklist/filter/ISP remediation (up to 3-time limit on Cloudmark blocks)
- Salesforce Integration Configuration
Integration of ExactTarget with Salesforce including the following activities:
 - Mapping of up to fifty Salesforce users to ExactTarget
 - Configuration mapping of up to thirty Salesforce Contact fields to ExactTarget fields
 - Configuration of sending ExactTarget email via the ExactTarget interface, using a Salesforce campaign or report as a Subscriber source
 - Mapping of unsubscribes to Salesforce - ExactTarget Opt-outs will correlate to a single email opt out field in the Salesforce record

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- Confirmation of reporting in ExactTarget. This validation will include a test case, including walking through the test send. This confirmation includes validation that the following fields are being received in Salesforce:
 - Opens
 - Click-throughs
 - Undeliverables

- Enterprise Profile Subscription Center

Development of one custom preference center. The preference center will include up to seven pages including the following:

 - Develop one preference center page with up to 230 fields, a field consists of a radio button, data capture or check box
 - Build one confirmation page & one error page
 - Profile page includes standard form field pre-population utilizing existing ExactTarget profile data
 - Subscription page includes standard check-box pre-population utilizing Status data from existing ExactTarget lists
 - Validation of: email address, date fields, required fields (null or value included), and phone number
 - Workflow to support preference updates based on status change.

- Journey Builder

Configure up to three interactions using the Journey Builder lifecycle marketing automation tool. Configure the contacts model to support the interactions setup as part of this activity including the following:

 - Configuration for up to 3 customer journeys with up to 20 steps in each journey
 - Configuration of contacts model for up to 3 customer journeys
 - Review of the campaign(s) to support journey
 - Provide recommendation for campaign optimization and interaction flow for journeys delivered

- Create Email Templates
 - Conceptualize, design and code up to four custom email templates with multiple content areas the customer can re-use. This includes:
 - One HTML email template shell (choose either static desktop or mobile responsive layout)
 - Up to 10 designed, coded, stored content boxes to be re-used in template
 - Sample email built from template and stored content
 - Documentation outlining template content area sizes and build tips

Salesforce Communities with Directory Custom Configuration

Create custom code via Salesforce's Visualforce toolset, which will enable alumni, donors, students, parents and friends to log into one systemwide, CU branded Online Community with credentials maintained within Salesforce to perform the following tasks:

- Edit profile
- Manage privacy settings
- Opt in or out of email communications, which will be stored within Salesforce
- Select areas of interest
- Search for other community members by a range of criteria (up to 25) with both a basic and advanced search
- Use Salesforce Chatter as an online social network to communicate with other Alumni, create groups, and share files

Key Deliverables:

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- One CU Online Community
- Configure roles and profiles for Online community users and internal CU users
- Develop, test and deploy custom code for Directory within Communities portal
- Configured Salesforce and roundCause Events
- Configured ExactTarget Marketing Cloud
- Configured Qualtrics Survey Forms and 4-5 template forms
- 10 reports and 2 Dashboards
- Configuration review sessions (4 sessions)
- Updated configuration

Data Migration

ACF proposes a joint data migration approach as described below:

Data Mapping

- CU will provide an initial extract of CU's data from Harris Connect.
- The ACF team will then review CU's data and map the fields to the Salesforce database structures in close consultation with CU's teams.
- The ACF team will then create two templates for the Contact and related email opt out and, if available, community data privacy setting information. The templates will define each field within Salesforce along with the relevant field values.

Data Transformation

- The CU team will create another extract of CU data in preparation for upload into Salesforce.
- The CU team will transform CU's data into the correct format as defined in the templates for upload into Salesforce. The CU team will also perform de-duplication such that the data is ready for load into Salesforce.

Data Load

- Once CU's data is transformed into the correct format, ACF will import it into Salesforce. For quality assurance purposes, ACF will first complete a mock conversion, followed by the final conversion.
- Once the data load is complete, ACF will work with the CU team to assure data quality by running key data metrics.

Deliverables:

- Data mapping
- 2 data templates
- 40 hours of support during data transformation including quality assurance
- Mock and final data load

Data Integration

After the requirements are complete, the CU team will provide ACF with eComm-required data points from Harris Connect, Advance, ISIS and HRMS. Using CU's Oracle Service Bus, ACF will support the load of the data into Salesforce to meet eComm data requirements. Specifically, the ACF team will complete the following tasks:

- Collaborate with CU to define Salesforce Data Mapping
- Support the CU UIS team in Testing and Deployment of the SFDC solution

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Key Deliverables

- Data maps for Salesforce to support ISIS, Advance and HRMS including Account, Contacts, Giving Summary, Biographic and Demographic information
- Support CU UIS up to 120 hours to complete integrations

Testing

ACF will fully test CU's implementation to ensure configuration and data integrations are accurate and complete. ACF will conduct thorough testing to ensure that the system performs with the full breadth of CU's requirements and that CU's solution is fully regression tested. ACF's methodology includes a configuration checklist, test planning and execution, and production validation.

ACF will also support CU in its User Acceptance Testing (UAT). ACF will make test materials available to CU that can be used for CU's testing. ACF will also support CU's testers by being available to answer questions, providing a short preparation training session to CU's user testers, and resolving issues found during user testing. All issues identified during the UAT phase shall be detailed in an open-issue log and regularly reviewed with University Relations to ensure open issues are resolved quickly and effectively.

Key Deliverables:

- Test plans
- Fully tested solution
- UAT support

Training and Change Management

In close partnership with University Relations, ACF Solutions will develop and deliver customized training on CU's CRM system. All training materials and curricula shall be submitted to University Relations for review and approval prior to execution of any training. ACF anticipates two types of training - user training and administrator training:

User Training

ACF Solutions will work with the CU team to design a focused course curriculum to best meet the needs of the eComm Super-user Staff. ACF will develop content to on-board this team to support the ~200 initial Phase I users of this solutions. Super-user training will include a mix of ACF and ExactTarget staff demonstrating tasks as well as hands-on training.

For estimating purposes, ACF assumes that it will develop up to 8 hours of training curriculum for CRM and up to 16 hours for email marketing and deliver that training one time to CU's approximately 30 campus program managers and super-users. ACF assumes that a sub-set (campus program managers) of these super users will then train the remaining end-users.

ACF Solutions will develop 15-20 end-user focused Quick Reference Sheets based on the CU configuration. Quick Reference Sheets are 1-2 page documents that concisely list the steps a user will perform to complete a specific set of tasks to support a business process. This allows users to quickly identify the best way to accomplish their jobs with efficiency and confidence. ACF will also develop 8-10, two-five minute videos to support the common activities of your user base.

Administrator Training

ACF will conduct an additional training for CU's eComm system administrator/s focused on reviewing the specifics of the CU configuration. This course will last approximately 4 hours. ACF assumes that the administrator/s will have taken the Salesforce Administrator training course (ADM 201) prior to this class

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to gain an understanding of the general Salesforce Administration concepts that are used when administering a Salesforce based system.

ACF recommends that training be conducted on-site at CU offices and have included travel expenses for 2 ACF staff members to travel to your offices for training.

Key Deliverables:

- 15-20 Quick Reference Guides
- 8-10, 2-5 minute videos
- 1 24-hour eComm super-user training
- 1 4-hour System Administration training

Deployment

During this step, we will work with the CU eComm team to deploy any custom components to production and perform production validation. We will also ensure that CU users are correctly set up and have the correct security profiles.

Key Deliverables:

- Deployed custom components

Project Management

This component of our approach is focused on the effective management of the overall project. It includes traditional project management activities such as scope/schedule management, risk/issue management, status reporting, cost management, change control and communication management. ACF agrees to conform to CU's existing project management (PMO) processes.

Key Deliverables:

- Updated project plan/schedule
- Weekly status report and status meeting

Post-Implementation Support

During the first three months post-implementation, ACF will provide post-implementation support to facilitate user acceptance by being available to answer questions, provide additional training sessions, create new reports, add new workflows or other configurations, to provide one-on-one training, etc. ACF has assumed 120 hours of post-implementation support. University Relations shall determine when User Acceptance Testing (UAT) has been satisfactorily completed. Once UAT is complete, post-implementation phase shall begin.

Key Deliverables:

- 120 hours for three months of post-implementation support

PROJECT TIMELINE:

Project completion is estimated to take approximately 16 weeks followed by post-implementation support following the schedule below:

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SCHEDULE

Activities for Week	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Kickoff and Project Initiation																
Analyze and Design																
Configure and Develop																
Configuration Review																
Data Migration Support																
Data Integration Support																
Testing																
Training																
Deployment																
Support/ Post Go-Live																
Project Management																

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