

Sales Goals

Description	Provider will provide services and training to implement Sales Goals.
Assumptions	Customer is fully onboarded in Provider's Enterprise platform. Customer environment already contains configuration to support the evaluation of the Customer's desired goal subject: Activities, Contracts, Opportunities, Event Opportunities, Events, Exhibitors, Service Orders, Service Order Items. Provider will configure up to two (2) Sales Goals. Customer will be responsible for configuring additional Sales Goals following provided training.
Limitations	Not Applicable
Kick Off	Provider responsibility: Internal handover and preparation Customer responsibility: Ensure key project resources and stakeholders can attend kick off meeting Ensure project scope is accurate and fully aligns to all business requirements Raise any risks, black out periods for software release, resourcing plan
Discovery	Provider responsibility: Up to one (1) 90-minute remote requirements gathering meetings with preparation and write up Customer responsibility: Ensure key resources can attend all discovery sessions Provide an understanding of business processes, data and requirements
Design	Not Applicable
Build	Provider responsibility: Define Sales Goal Types Configure up to two (2) Sales Goals Basic reporting views Customer responsibility: Configure additional Sales Goals
Training	Provider responsibility: Up to one (1) 90-minute remote training sessions, sessions will be recorded Training is scheduled to be completed in one (1) week Customer responsibility: Ensure appropriate users are selected and attend all training sessions All users will be expected to complete the designed curriculum in the Provider's Learning Center Training is scheduled to be completed in one (1) week
Testing	Provider responsibility: Up to one (1) 30-minute remote User Testing meetings to review and resolve any issues, with follow up Provider will maintain their own internal issue log to track status and progress of issues raised. User Testing is scheduled to be completed in one (1) week Customer responsibility: Customer is responsible for preparing for and executing user testing, including creation of test plans, test cases, and test scripts. Ensure key resources attend all testing meetings Raise any issues found (that are within the scope of the Statement of Work) via the issue log The testing phase will be no more than one (1) week in duration
Launch & Post Launch	Provider responsibility: Internal handover as needed Project Closure Post Launch activities will be completed in one (1) week Customer responsibility: Ensure key resources attend all post launch support review meetings Complete customer satisfaction survey Post Launch activities will be completed in one (1) week
Project Management	Provider responsibility: Coordination of resources, activities, meetings in alignment with timelines and milestones Customer responsibility: Nominated project lead Coordination of activity and resources on customer side to align to project plan and schedule
Exclusions	Once the build phase begins, any further requirements are considered to be out of scope. Custom development Services Integration

Length of project: 4 weeks from kick off to project closure

Note: This is an estimate and is dependent on Customer cooperation, timely responses and availability of necessary resources.