GSD

Statement of Work & Master Services Agreement
CityWorth

Statement of Work

Summary

Phase 1: Sales Cloud
This phase of project will encompass the implementation of Salesforce Sales Cloud Enterprise Edition for City Worth for roughly 100 users. GSD will run a full discovery session along with full documentation of project requirements and milestones which will be signed off by the client. This estimated scope of work has been built based on the initial discovery sessions and calls between GSD and the client. The primary objectives of this phase of the project will be to build and configure the sales process for City Worth from lead or application, all the way through approved and funded loan. Loans and applications per client will be memorialized by a custom object inside of Salesforce.

Phase 2: Loan Applicant Portal
This phase of the project will encompass the customization and implementation of Salesforce Customer Communities to provide an applicant portal for applicants to track the status of their loan from submitted to funded. New applicants should be able to sign up for a username and password to begin the application process. GSD will leverage custom visualforce pages and fields to create the application interface. The applicant will be guided through the application process through to submission. At various stages of this process, the client will be asked for certain documentation and be given an area to upload this information. City Worth will receive this information on the back-end of Sales Cloud to continue with the approval of the loan. As a result of this work, there will also need to be workflows built into Salesforce to automatically change the status of the loan by fields on the lending opportunity in Salesforce.

Phase 3: Marketing Cloud Configuration
This phase of the project will encompass the implementation and configuration of Marketing Cloud Email Corporate, Marketing Cloud Super Messages and Marketing Cloud Journey Builder including up to 5 email templates, 5 SMS alerts via automation, 3 mobile alerts configured in Journey Builder and 2 basic Journeys to support existing (active) loan applicants and potential (non-active) loans.

GSD will also configure Advertising Studio to manage and track ROI inside of Salesforce, tying value to campaigns by associating with Sales Cloud leads and opportunities through the funnel.

Goals
1. Create an enforcable lead process to handle uploading of multiple lead records and calling into those people, logging activities along the way.
2. Embody City Worth's sales process using the Opportunities object inside Salesforce.
3. Manage Applications and Loans inside of Sales Cloud, related to the actual contact or applicant record.
4. Allow for simple and easy upload and sorting of internal documents as they relate to applicants.
5. Integrate Calyxpoint and Sales Cloud to sync loan and contact level data back and fourth.
6. Create reports and Dashboards to show activities, pipeline, leads and marketing metrics.
7. Configure and deploy Marketing Cloud Journey Builder to follow potential and current applicants through the loan process and create more potential loan.