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This Proposal is part of the Professional Services Agreement executed between Allium IT, LLC ("Allium") and ████████████████████ executed on ████████.

NAME: Implementation Services: Service Cloud and Communities

OVERVIEW:

████ is a service leader in digital asset management (DAM) with cloud-based DAM solutions that help marketers plan, manage, review, publish, and analyze their marketing files so they can deliver the right content, to the right people, in the right format, at the right time.

Widen is looking to convert to Salesforce Sales Cloud Lightning in the near future, and wants to achieve a 360 degree view of their customers. Today disparate systems track aspects of ████ customer interactions. By implementing Service Cloud, ████ will move to one platform for integration and reporting. Additionally the implementation of Live Agent and Communities will improve the customer experience and improve reporting.

GOAL: Create one platform with the goal of guiding customers to become advocates. This will be done by improving integration, reporting, and customer experience for logging support tickets, sharing knowledge, and participating in a community.

OBJECTIVES:

- Implement Service Cloud for 10 support agents and approx. 20 non-agents.
- Implement Community Cloud for approximately 5000 members.
- Load 12 months of service tickets (approx. 15,000) into Salesforce (currently housed in ████████).
- Load up to 400 knowledge articles into Salesforce Knowledge.
- Provide capability to send information related to Cases to ██ to create visibility for the development support team.
- Provide capability to send updated ██ ticket information from ██ to Salesforce.

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SCOPE:

Description of Services:

Service Cloud Implementation:

- Customizing Fields, Page layouts, Standard Templates
- Defining Assignment Rules
- Setting Up Auto-Response Rules, Case Escalation Rules, Entitlements and Milestones
- Capturing Cases from website, emails, customizing the case sharing model
- Setting up Case Team
- Upload ████ data
- Create Case to ██ automations (integration)
- Upload Knowledge articles
- Implement Basic live agent

Customer Community Implementation:

- Enable Salesforce Communities. Choose a unique URL that works for your business, cannot be changed after it's been set. Define Assignment Rules.
- Enable Service Cloud features you plan to use in the community, such as Salesforce Knowledge and Idea Submissions.
- Review profiles, permission sets, data categories, feed tracking settings and add community members.
- Enable Salesforce Communities Management standard Dashboards.
- Set up: navigational topics, create permissions for Case Object, Salesforce Knowledge, Reputation, moderation criteria and rules, internal chatter group for feedback, etc.
- Security Settings

Stakeholder Training and Hand-Off

- Train Client stakeholders on the solution, as needed, during the Testing process.
- Provide Hand-Off of the solution.

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Estimated Fees: $ ███ - $ ████ Allium will invoice ██% of the low end estimate at the start of the project and invoice additional progress billings monthly. Invoices are due upon terms agreed to within the Professional Services Agreement.

Duration: 3-4 months

Start Date: ████████████*

Estimated Completion Date: ████████████*
  *Subject to change based on client timeline

Assumptions:

- Widen will assign a primary contact person to serve as Client Project Manager. This person will coordinate Allium's access to necessary systems and subject matter experts, assist with scheduling meetings and client activities, and oversee the completion of tasks identified as client responsibility.

- The service duration and price identified herein are based on the assumption that Allium will have access to appropriate subject matter experts as required. Should client resources become unavailable, Allium Project / Engagement Management will continue as necessary to preserve project momentum and manage risk caused by the unavailability.

- Change(s) in the scope of services and deliverables as defined herein (including issues that were not apparent at the time this proposal was entered) may result in change in expected service duration and/or fees. Such changes will be documented in writing and approved through Allium's Change Management process.

- For ████████ data to be loaded into Salesforce, a unique identifier exists in both systems and will be used for matching. ██████ will update the data for any exceptions where a direct match does not exist. Cleansing of Data before the 'one load' into Salesforce is the responsibility of Widen.

- Widen will prepare the 400 existing Articles for Import to Salesforce Knowledge (i.e. identify article type, naming, description, etc.) for 'one data load'. Additional data loads may result in a change request. ██████ will identify representative sample articles to be included in testing.

- Widen has existing definitions of Case (ticket) severity levels which will be mirrored in Service Cloud. Automation will be developed to create a Jira ticket when a Case created in Salesforce is at the severity level requiring developer review of the issue. A semi-automated process will be developed to send updates back to the Salesforce Case from ██.

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- ████ will provide branding assets for setup which may include: High-resolution image of your company logo, Color scheme (or an image to upload to automatically generate one), Image to use as a header, Thumbnail images (385x385 pixels).
- ████ is responsible for updates to their websites with web to case functionality
- Allium will create a basic Live Agent implementation. Widen is responsible for updates to their websites to link to this functionality (buttons to link to chat, functionality on website etc.)
- Widen will identify new users (Service Cloud & Community), roles and profiles needing access to Salesforce information for the one time set up of users.
- Setup and configuration of Entitlements and Milestones performed during the timeframe of this project will be ████ responsibility.
- Allium will conduct regular weekly service updates (status reports) with ████.

Other Terms:

Either party may end this Service Order prior to expiration with two weeks' minimum written notice.

Work Location(s):

Services will be performed remotely. If needed, resources can attend meetings or work on-site as requested by Client
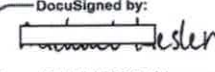

Bill to Address: ████████████████████████████

Bill to Email address: ████████████████

This Service Order is entered into on ████████████████

ALLIUM: CLIENT:

DocuSigned by: DocuSigned by:

andy McIntyre   ████████ lesler

By: _____   By: _____
    E971B77F7CF144B   12B1AB8E3D7E481
    Name: Andy McIntyre   Name: ████████
    Title: Managing Partner   Title: ██

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About Allium:

Allium was formed in 2011 by two co-founders who have over 40 years of IT Consulting -- software development, software lifecycle, and deployment experience. Headquartered in Milwaukee (Brookfield), WI Allium provides technology services in the following specialty areas: Salesforce, Microsoft, Technology Consulting and Strategy Management.

Services provided are categorized as 3i's: Implementations, Integrations and Improvements. The solutions are delivered in the manner requested by our clients whether it is project-based, managed services or onsite services. We are located in Wisconsin and can easily be on site when needed.

Our proactive, collaborative, and candid approach to design, development, configuration, integration, testing, training, documentation, support, and other consulting services is a direct result of our experience. It's the reason our clients continue to engage us for new projects and services.

Our clients deserve and require more than cookie cutter answers. Allium follows a consultative approach to unearth insights and develop a strategy for your specific needs. We propose options and present alternatives to deliver results every time. The foundation of Allium's project approach is our TRANSIT Methodology; a tested, flexible project framework developed by Allium's Strategy and Management practice. Through project management driven by clear, well-defined processes incorporating standard project artifacts and deliverables, Allium has developed a proven and repeatable method to successfully deliver solutions to meet ████ requirements as planned and budgeted.

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Discovery	Design	Implement	Manage/Support
Kickoff	Requirements	Build	Consult
Process Analysis	Options/Recommendations	Configure	Maximize Capabilities
Review	Solution Selection	Validate	Administration
Formalize	Formal Sign Off	Implement	Support
Findings		Training	

TRANSIT was developed by Allium in practice through working with our clients in project-based engagements. *TRANSIT* is a right-sized, iterative engagement and delivery methodology that consists of four stages:

- Discovery – Understand and formalize the requirements of client initiatives
- Design – Design/identify the most optimal solutions available
- Implementation – Iteratively implement the selected solution(s)
- Manage & Support – Provide support after implementation is completed

Allium applies the *TRANSIT Methodology* across our focus on three practice specializations:

- Strategy and Management
- Salesforce Consulting Services (Implementation, Integration, Improvement)
- Technology Consulting