



**ENGAGING SOLUTIONS**  
*we answer to business™*



## QUALIFICATIONS

# Product to Cash (P2C)

*created for*

**Salesforce**

prepared by **ENGAGING SOLUTIONS**



**ENGAGING SOLUTIONS**  
*we answer to business™*

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June 29, 2022

Sarah Middaugh  
Corporate Professional Services,  
Sourcing Category Manager  
Salesforce  
317-605-5530  
[smiddaugh@salesforce.com](mailto:smiddaugh@salesforce.com)

Dear Ms. Middaugh,  
Engaging Solutions, LLC (ES) is delighted to submit a proposal to Salesforce to provide Product to Cash (P2C) outcomes. ES is a business partner you can trust to help you prepare to solve complex issues.

We appreciate you trusting us during the pre-planning process and hope to continue working with your team. We understand this is new and vital work for each of your organizations and are grateful to have the opportunity to partner with your organizations. In this submission, you will find that we have included our plan, staff and cost to support your organization's needs. This proposal is based on the information you provided in our discussion.

We hope you will agree we are the team you need. I can be reached at 513-254-4270 (mobile) or [vfreemankarmo@engagingsolutions.net](mailto:vfreemankarmo@engagingsolutions.net). We appreciate your consideration of Engaging Solutions for this engagement and are available to start when you need us.

Sincerely,

*Valda Freeman Karmo*

Valda Freeman-Karmo  
Director, Office of Innovation

***Our promise.***

*listen to your needs  
apply innovative solutions  
provide quality work in a timely fashion  
commit strict attention to detail  
work within your budget  
provide a sustainable product*

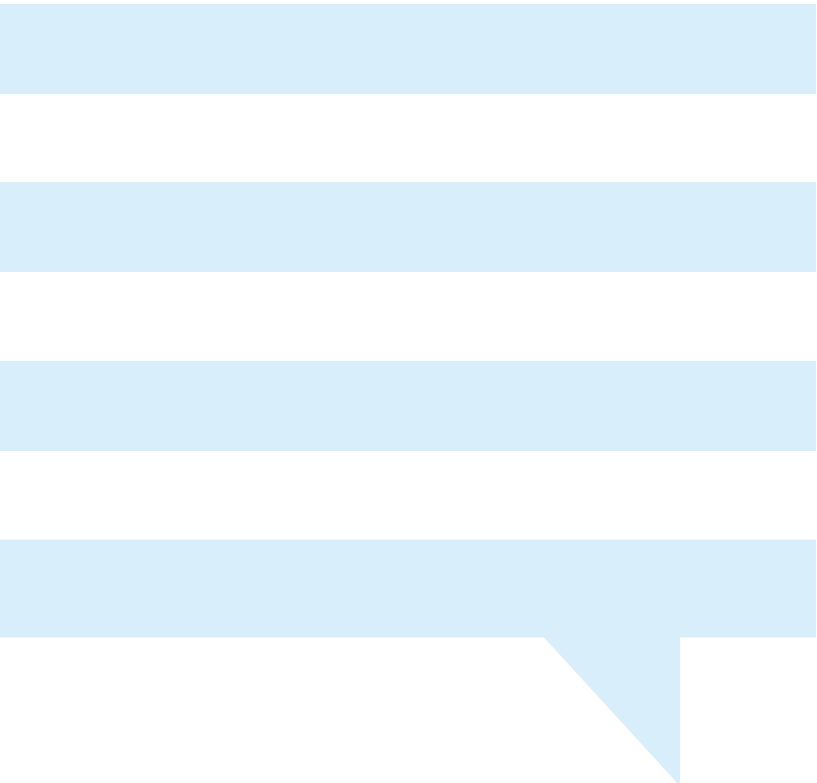
***Our philosophy.***

*listen  
understand  
think  
create  
evaluate*

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# Corporate Overview

## MANAGEMENT

Our executive team has a wealth of experience in both the public and private sectors. They have previously served in the following capacities:

- Fiscal Analyst for the Indiana General Assembly Ways and Means Committee, responsible for drafting important legislation including the Healthy Indiana Plan (HIP), property tax reform and school funding formula
- SVP of Consulting for The Kaleidoscope Group, a full-service diversity, equity, and inclusion consulting firm
- Director of the Office of Audit and Performance (OAP) for the City of Indianapolis and Marion County, Indiana
- Ball State University Assistant Teaching Professor, College of Architecture and Planning
- Senior Director of information Technology for CARESOURCE

## MANAGEMENT PHILOSOPHY

Leadership has set clear expectations for our organization, operating in transparency and leading by example. We work to create an environment that is flexible, encourages open communication, prizes fairness, recognizes strong work performance and respects the differences and rights of all individuals.

## OUR TEAM

Engaging Solutions has a servant leadership culture in which we try to cultivate individuals with exceptional service attitudes and behaviors, superior communications skills, and high professionalism. We have more than 130 professionals with advanced degrees in urban and regional planning, transportation planning, urban design, accounting, compliance, financial management, data analytics, cultural competency, informatics, project management, public engagement, economic development, and qualitative and quantitative research. We train employees to succeed in their current positions and encourage them to continue improving their skills and capabilities for the future. It seems to be working: The Indianapolis Star ranked Engaging Solutions as one of the city's Top Workplaces in 2016, 2017, 2018 & 2020.

## DATA

Business Intelligence and Data Analytics at Engaging Solutions empowers our partners with the right information at the right time. We do this by integrating technology solutions and robust analytics into practical, relevant results that make a difference for our clients and the communities we serve. We are thought leaders in the technology and data space, applying ingenuity and innovation, as we guide our partners to impactful outcomes. We measure our success by your success.



**ENGAGING SOLUTIONS**

*we answer to business™*

Our mission is to create superior value for clients, employees, associates and partners by providing tailored solutions for evolving business needs.

Engaging Solutions, LLC was established in 2005 as a management consulting firm with six core service areas

1

**BUSINESS INFORMATION & DATA ANALYTICS**

2

**CONTACT CENTER SERVICES**

3

**DIVERSITY, EQUITY & INCLUSION SERVICES**

4

**FISCAL & COMPLIANCE MONITORING**

5

**HEALTH OUTREACH**

6

**PLANNING & COMMUNITY DEVELOPMENT**

## Our company has received local, regional, and state recognition:

**2020, 2018, 2017, 2016**

Indianapolis Star –  
*Top Workplaces*

**2019**

Great Lakes Women's Business  
Council –  
*Indiana WBE Role Model of the Year*

**2017**

Initiative for a Competitive Inner  
City –  
*Inner City Top 100 List*

**2017**

Mid-States Minority Supplier  
Development Council –  
*MBE to MBE Spend (Class 2)*

**2016**

Fifteenth Annual Mayor's  
Celebration of Diversity –  
*Community Relations Award*

**2013**

Midwest Women's Empowerment –  
*Summit Award*

**2012**

Indianapolis Minority Supplier  
Development Council –  
*Supplier of the Year Award*

**2011**

Indianapolis Public Schools –  
*Office of Supplier Diversity Partner  
of Excellence*

## DIVERSITY & INCLUSION

Creating an inclusive and diverse workplace is a core value at Engaging Solutions. We recognize that our employees and the Indianapolis community are our greatest assets. Diversity is our power: We build teams with highly skilled individuals who are representative of the communities we serve and bring a diversity of thought that is created by divergent life experiences. Equity & Inclusion is our expectation: We intentionally cultivate and maintain an inclusive culture where everyone feels welcomed, heard, valued, has an opportunity to contribute and is committed to live our company values and is motivated to achieve equitable outcomes.

Over 87.5% of our employees are racial/ethnic minorities, of which 60% hold mid- to upper-level positions. We also developed a partnership with Tangram, Inc. to launch a Workplace Innovation Network to match qualified individuals with disabilities and other barriers to employment. ES team members have completed Disability and Awareness Training and are working to develop a Disability Inclusion Plan. Currently, we have two employees through the program.

## PARTNERSHIPS

Engaging Solutions has partnerships with a variety of small businesses, churches, civic organizations, and nonprofits located across Indianapolis and Marion County. They are vital in the engagement work we do, because they are some of the greatest resources for the communities they serve. Our relationships within the community allow us to connect with our target audiences so that we can bring their voices, ideas and concerns to the table.

## PHILANTHROPY

We will honor the communities in which we operate by giving back to improve the quality of life. Engaging Solutions is equally committed to supporting the Indianapolis community. Ten percent (10%) of our net profit is donated back to the community through in-kind and financial donations. Additionally, we donate hundreds of volunteer hours to organizations throughout the state of Indiana, giving employees paid time off to volunteer for organizations in their neighborhoods that help the most vulnerable.

# Past Experience



## **SHELL GLOBAL – LEAN SIX SIGMA, KAIZEN EVENT**

Shell Global was experiencing numerous payroll errors for employees that moved in and out of international assignments. To solve the problem, a Kaizen Blitz was facilitated for a global process team to define the root causes of the errors and to determine/develop action plans to eliminate future errors. As a result, the event successfully led to the development of 73 detailed action plans with responsibility charts that eliminated the root causes and mitigated effects.

## **SHELL CAR CARE – PROGRAM MANAGEMENT PROCESS**

Shell Car Care lacked a robust strategy development and deployment system that ensured its other brands aligned and delivered on business objectives. Prior to the program management process, critical work needed to achieve business objectives was not successfully initiated. To solve the problem, a metrics tracking system for objectives, goals, strategies, and measures was created. The Program Manager was coached to develop business objectives, goals, strategies, and measures into a comprehensive plan, and the initial launch process was evaluated to recommend improvements. The work led to successful education on structured strategy development, strategy deployment, and program management which reduced the amount of future work and eliminated non-value activities. It also resulted in significantly reducing the total project portfolio due to the more rigorous application of “gate” technology. Following the process, Shell Car Care had the ability to reduce its staff, as the program manager successfully transitioned parts of program management to the brand managers.

## **PROCTOR & GAMBLE (P&G) – PERFORMANCE IMPROVEMENT**

The packaging division of Proctor & Gamble (P&G) faced significant quality outages and high costs which put the company at risk of losing its business. The client demanded immediate improvements while having an alternate supplier on board as performance improvement was an urgent need. As a result, the team trained and coached the site resources on Continuous Process Improvement philosophies and tools. The progress was monitored and the leadership team was coached to increase line efficiencies and rates, meeting customer requirements, and meeting financial objectives. The team led the development and management of an action plan that implemented the customer’s Quality Assurance Key Element system. After the performance improvement, the packaging company maintained its current business and was awarded new business after meeting customer expectations while improving financial results. Since the customer expected just-in-time secondary packaging and provided most of the handling equipment and inventory management systems, a process was created for weekly two-way feedback for the supplier and customer to work on issues and potential issues to minimize disruption to the business. Additionally, the production systems were improved through better placement of people, minor equipment changes, utilizing rapid changeover techniques, and cross-training resources for more flexibility.

# References

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## **SHELL OIL**

### **Michael Washington, Ph.D.**

Former Vice President of North America Logistics Operations

Email: m.a.washington8385@hotmail.com

Mobile: 713-213-5456

## **PROCTOR & GAMBLE**

### **Henry Brown**

Former Director of Engineering for North America

Email: brownhe68@gmail.com

Mobile: 513-226-8724

## **Qualifications of Key Staff**

**We have a talented team of experts who collaborate with government agencies, nonprofits, small businesses, and Fortune 500 Companies to resolve complex issues with in-depth research, collaborative planning, and effective implementation. We pride ourselves on customizing a team to best address the needs of our clients. Our team has a proven history of exceeding our clients' needs and performance goals. Furthermore, our past projects demonstrate our abilities and show we know what it takes to implement effectively.**



# ALEXIS HICKS

Business Development Specialist  
Engaging Solutions

## EDUCATION

*LIM College*

- Master of Arts in Fashion Marketing

*University of Kentucky*

- Bachelor of Arts in Integrated Strategic Communications with a focus on Public Relations and a minor in Psychology

## CORPORATE RESPONSIBILITY

- College Mentor for Kids, Volunteer, Mentor
- Public Relations Society of America (PRSSA), Member
- Red Shoe Crew, Member
- LoveLex146, Member

## EXPERTISE

Alexis is an expert in all things creative, she has years of experience in marketing, communications, editing, and design. Alexis uses her wealth of experience to offer a unique way to deliver and produce content. She planned an event for the IU Simon Cancer Center to inform low-income individuals in the Indianapolis community about HPV vaccinations. Additionally, Alexis has planned events for Athleta to market the brand to the local community.

Throughout her career, Alexis has learned the value of communication and building relationships with clientele. She uses her interpersonal communication skills combined with her creativity to present authentic solutions to problems. During her time at Zipie Advertising Agency, Alexis took it upon herself to become Google Ad and Google Analytics certified to better understand the analytical aspect of her position. With that said, her work extends beyond the workplace as well as Alexis strives to give back to the youth in the Indianapolis community in her free time.

# DEMETRIUS GLOVER, PH.D.

Account Director, Diversity, Equity & Inclusion  
Engaging Solutions



## EDUCATION

*Purdue University*

- Doctor of Philosophy, History
- Master of Arts, History

*University of Southern California*

- Bachelor of Arts, History

## CORPORATE RESPONSIBILITY

- IU Kelley School of Business, Tobias Fellows Leadership Program
- Central Indiana Education Alliance, Data Management Team, Co-Chair
- Academy of Information Technology Board, Chair
- Early Learning Advisory Committee, Gubernatorial Appointee for Data Coordination
- Mayor Hogsett Non-Profit Transition Team, Member

## EXPERTISE

Demetrius is a trusted advisor and data-informed leader, who provides vision and strategy to lead organizations to profitability and growth; easily interfaces with internal and external stakeholders to build consensus

With over 25 years of experience, Dr. Glover utilizes his wealth of knowledge to design and create data-driven strategies and smart solutions for organizations. He utilizes his interpersonal communication skills to strengthen relationships with internal and external stakeholders by providing vision and strategy to lead organizations towards inclusivity and profitability. His unique approach has successfully improved population resource distribution for a variety of organizations.

While serving as the Executive Director of Indiana Construction Roundtable (ICR), Demetrius advocated for many issues important to A/E/C industry and led the ICR Diversity and Inclusion Task Force which developed the 2021 ICR Diversity, Equity, and Inclusion plan for the A/E/C industry. Additionally, Dr. Glover has presented at numerous conferences to share his abundant knowledge with others on a variety of topics ranging from strategic planning, data analysis, and maximizing assets. Outside of his professional work experience, Demetrius has raised over \$8 million in hurricane recovery grants to help hurricane impacted individuals in southern Louisiana which brought relief to thousands of people since hurricane Katrina.

## RELEVANT PROJECTS

- **IU Health Adult Academic Health Campus**– Indianapolis, IN
- **IU Health Bloomington Hospital IU Reginal Academic Health Center** – Bloomington, IN
- **ICR Mentor–Protégé Program for Diverse–Owned Construction Firms** – Indianapolis, IN
- **City of Indianapolis Community Justice Campus** – Indianapolis, IN
- **Bottleworks District** – Indianapolis, IN
- **16–Tech Indianapolis Innovation District** – Indianapolis, IN



## **KELLI LESTER**

Chief Strategy Officer  
Engaging Solutions

### **EDUCATION**

*Ball State University*

- Bachelor of Science, Speech Communication/Telecommunications

### **CORPORATE RESPONSIBILITY**

- Sigma Gamma Rho Sorority, Inc., Member
- Stepping Stones, Former Board Member

### **EXPERTISE**

Kelli is a dynamic senior-level professional with progressive experience in strategic consulting and is an expert in defining vision, developing strategy, and executing action plans with sustainable results. Through strategic planning, leadership development, revitalization, and market analysis, Kelli has become instrumental in developing Diversity Equity and Inclusion (DEI) initiatives for consumer-packaged goods and multi-media companies. Her strong skill set, which includes collaborative, analytical, negotiation, project management, career coaching, marketing, decision making, and public speaking skills, have proven invaluable to Engaging Solutions.

During her 20 years of experience in DEI, Kelli has assisted several multimillion-dollar companies and provided them with strategic direction, analysis, and design curriculum to create the most optimal performance. In addition, she has advised clients on creating transformative and sustainable changes within their workplaces, workforces, marketplaces, communities, and with their suppliers. Kelli coaches DEI Practitioners, senior management, and leaders from multiple organizational cultures to become champions of DEI.

### **RELEVANT PROJECTS**

- **Planned Parenthood Federation America DEI Resource Guide and Webinar** – United States
- **IU Health AHC Strategic Consulting** – Indianapolis, IN
- **Division of Mental Health and Addiction Cultural Competency Conference Consulting** – Indiana
- **Rich Products Corporation** – Global
  - Strategic Consulting, Education, Assessment, Program Development, and D&I Talent Management Integration



## **MARK GIBLIN, MA, CLSSB**

Director of Business Intelligence & Data Analytics  
Engaging Solutions

### **EDUCATION**

*Indiana University–Purdue University Indianapolis*

- Master of Economics, Specialization in Econometrics
- Bachelor of Arts in Quantitative Economics

*John Hopkins University Center for Government Excellence*

- Data Management: Quality and Standards
- Data Sharing: Concepts and Practice
- Foundations of Data Governance Structures
- Foundations of Open Data
- Foundations of Performance Analytics

*Purdue University Manufacturing Extension Partnership*

- Six Sigma Black Belt

### **EXPERTISE**

Mark is a data analytics and continuous improvement strategist with a proven track record of leading cross-functional teams in developing integrated solutions focused on delivering measurable results. As the Director of Data Analytics, Mark ensures resources are maximized across the enterprise to meet and exceed client expectations. He delivers high-quality client services by developing strategies for the use and management of data, creating and monitoring performance and productivity metrics, and conducting advanced analysis for the Contact Center and business operations.

Mark has experience managing comprehensive programs designed to improve outcomes and ensure compliance in the fields of education, health care, local government, and diversity, equity, and inclusion. He has established data analytics, data management, and data governance programs which leveraged data for advanced analysis, performance dashboards, and organizational transparency and accountability. As a Lean Six Sigma Black Belt, Mark uses continuous improvement techniques to develop and implement solutions for complex problems. He employs these methods to detect operational inefficiencies, influence dynamic growth, and identify cost savings. With his extensive knowledge of innovation, continuous improvement, and data analytics, Mark advances an organization's data culture by managing data as an asset, improving data access and literacy, enhancing operational performance, and fostering data-driven decision making. He is passionate about helping clients and partners solve problems, improve performance, and achieve better outcomes.



# SYDNEY JOHNSON

Director of Business Development  
Engaging Solutions

## EDUCATION

*University of West Georgia*

- Bachelor of Arts, Communications

*Burke Institute*

- Trained Focus Group Facilitator

*Gwinnett Technical College*

- Certified Meeting and Event Planner

## CORPORATE RESPONSIBILITY

- Civic Theatre, Board Member

## EXPERTISE

Sydney is a trained focus group moderator as well as a certified meeting and event planner. She has planned and conducted focus groups for Family and Social Services Administration (FSSA), Indiana Black Expo (IBE), and Ford Mobility. In addition to FSSA and IBE, Sydney has led key informant interviews for the Indianapolis Urban League African American Quality of Life Initiative.

Her extensive experience in planning and education includes leading events, workshops, and training across diverse markets. By effectively identifying project goals and potential difficulties, Sydney has been able to plan and reach the desired outcome of clientele. Sydney has organized and executed training programs, event marketing campaigns, community and private events, data collection, health initiatives, and educational presentations for clients. Her work includes the facilitation of two 9-week training programs, organizing free HIV testing for the University of West Georgia, team-building retreats, weddings, and creating educational material for the Fight for Life Foundation.

## RELEVANT PROJECTS

- **Cummins Health Equity Initiative** – Rocky Mount, NC, Charleston, SC; Columbus, IN
- **Far Eastside Economic Inclusion Agenda** – Far Eastside of Indianapolis, IN
- **Indiana Black Expo Landscape Assessment** – Indiana
- **Healthy Opportunities** – Indiana



## **VALDA FREEMAN-KARMO**

Director, Office of Innovation  
Engaging Solutions

### **EDUCATION**

*University of Cincinnati*

- Master's in Business Administration
- Concentration in International Business

*Purdue University*

- Bachelor of Science in Electrical Engineering
- Concentration in Controls and Computer

*American Society for Quality*

- Certified Six Sigma Black Belt

### **CORPORATE RESPONSIBILITY**

- Alliance for Leadership Interconnection (ALI), Board President

### **EXPERTISE**

Valda is a uniquely qualified innovation leader and coach with more than 20 years of Strategic Performance Improvement consulting experience. For many years she has delivered superior business results that benefit an organization and the stakeholders it serves. Valda's experience and drive allowed her to create, analyze, and improve an entire business or organization by utilizing synergy and delivering breakthrough performance in product or service innovation, purchasing, engineering, manufacturing, distribution, logistics, and customer service. In addition to her advanced skillset, Valda is also the President and Founder of KAR.MO, LLC, a firm that provides aid to its clients through three focus areas: Holistic Health Coaching, Academic Achievement Programs, and Management Consulting.

While serving as a Principal Consultant at KAR.MO, LLC, Valda gained vast experience with Strategy Development and Deployment, Integration Project Management, Program Management, and Diversity Services. In her previous role, she led a thorough RASCI (Responsible, Accountable, Support, Consult, Inform) and Effort Utilization matrix for a major petroleum company which estimated that 9 functional leaders would need to spend 15% to 66% of their time on the project. Additionally, while at Procter & Gamble, she led the execution of three new global businesses in Fabric & Home Care New Business Development. Although Valda has a unique skillset, it is her drive and dedication that yields exceptional results that solve and improve a variety of business needs.



# WARREN CULPEPPER

Chief Technology Officer

Engaging Solutions

## EDUCATION

*University of Indianapolis*

- Master of Business Administration, Information Technology
- Bachelor of Science in Business Management Science

## Certifications

- American Health Insurance Plan (AHIP) Leadership Development
- Sarbanes Oxley / 404 and SAS 70 Audit Methodology
- QAI Certified Software Test Engineer and Quality Assurance Trainer (CSTE/CQA)
- Total Quality Management (TQM) Disciplines and Practices
- ISO9000 Maturity Project Management Disciplines and Practices
- Certified Rational Unified Process (RUP) Project Manager

## CORPORATE RESPONSIBILITY

- Lakeview Church, Board Elder
- St. Andrews Catholic Church, Youth Coach and Athletic Director
- Eagle Creek Community Church, Youth Minister
- Mount Pleasant Baptist Church, Youth Minister

## EXPERTISE

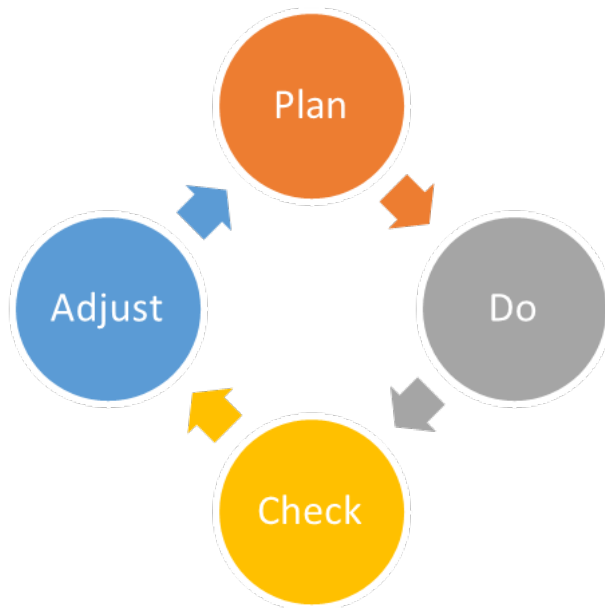
Warren is a transformational and innovative business partner known for delivering sustainable and cost-effective results because of his extensive strategic planning, implementation, and software integration experience. He is recognized for identifying, developing, and retaining top talent due to his ability to effectively coach, mentor, and train. Warren is highly capable of developing creative solutions to short- and long-term plans, and has built relationships with key stakeholders, executives, vendors, and cross-functional teams. With nearly 20 years of experience, he has successfully built and enhanced capabilities across all data disciplines and has overseen all aspects of strategy planning, design, and execution delivery of technology program initiatives.

Warren has a passion for helping clients become data-driven organizations by providing data literacy to help understand and interpret data. In his previous role at Onebridge, he used strategy to bridge the gap between healthcare policy makers, providers, payers, producers, and consumers in the healthcare value chain. With his knowledge and expertise, Warren successfully managed a \$35-\$40 million operating budget and \$25 million capital investment project portfolio budget while simultaneously serving as a leader to technology and consultant professionals.

# Description of Services

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**THIS SOW IS SUPPORTING SALESFORCE'S CONTINUOUS IMPROVEMENT CYCLE (PLAN-DO-CHECK-ADJUST) OF THE REVENUE CLOUD BEST PRACTICES ROLL-OUT.**



Salesforce has created a comprehensive Body of Knowledge regarding its Revenue Cloud identification of personas, customer journeys, and best practices that will aid both internal and external customers of Revenue Cloud services by leveraging the product features. Deep research has been conducted in the "Plan" phase of the work and extensive documentation of visual personas, customer journeys with pain points, and service blueprints of Best Practices have been created in the "Do" phase of the work. Now it is time to enter the "Check" phase of the work where Salesforce will first evaluate itself on applying the Best Practices and validate the Best Practices and models with a cohort of 8 customers. Engaging Solutions is delighted to assist in the "Check" phase of the work given our innovation stack of Assessments, Lean Six Sigma, Focus Groups, and Program Design in addition to our competitive advantage of Diversity, Equity, and Inclusion expertise. We are also well positioned to assist Salesforce in completing the Best Practices work by building in the new learnings from the "Check" phase and moving expeditiously through the "Adjust" phase by updating the Jobs To Be Done, Personas, and Customer Journey Maps in an engaging way using the Figma design tool.



# Description of Services

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The outcomes of this work will be a Salesforce-on-Salesforce example of best practice that creates a clear path for our teams to implement a customer centric, solution agnostic technology that is stable over time and has measurable outcomes.

## **KEY DELIVERABLES**

- 1. Work across several teams within Revenue Solutions and throughout the organization's cross-functional business units to:**
  - Identify and describe any missing personas
  - Detail the jobs to be done by those personas, and
  - Map out the journey of those personas by providing a visual map and an interactive service blueprint, with the first one being a Self Service customer journey
- 2. Work with a small subset (8) of external customers to:**
  - Validate the Salesforce Product to Cash Revenue Cloud Best Practices is complete
  - Expose the 8-customer cohort to Salesforce Best Practices for customer feedback
  - Map out the 8 customer cohort Customer Journeys and Best Practices and incorporate learnings into Salesforce Customer Journeys and Best Practices
- 3. Provide a Jr. Business Architect with a Quote to Cash background to support Best Practice and Salesforce Lead Business Architect, as needed.**

# Proposed Budget

Presented to: Salesforce

Date: 6.29.22

Key Milestones	Location	Hourly Rate	Estimated Hours	Estimated Total
Valda – Program Manager, Operations Excellence Director	Remote	\$300	580 hrs.	\$174,000
Mike W – Operations Excellence Sr. Consultant	Remote	\$300	423 hrs.	\$126,960
OEE – Operations Excellence Engineer	Remote	\$150	470 hrs.	\$70,500
Alexis – Designer	Remote	\$90	395 hrs	\$35,510
Mark – Business Intelligence - Data Analytics Director	Remote	\$300	158 hrs.	\$47,400
Warren – IT Executive Consultant	Hybrid	\$425	218 hrs.	\$92,480
JrBA – Jr. Business Architect	Remote	\$125	1,088 hrs.	\$136,000
Kelli – Chief Strategy Officer	Hybrid	\$425	164 hrs.	\$69,700
Sydney – Focus Group Leader	Hybrid	\$150	272 hrs.	\$40,800
Demetrius – Focus Group Designer	Remote	\$250	272 hrs.	\$68,000
			<b>Total Hours:</b> 4039 hrs.	<b>Total Cost:</b> \$861,350

\*Travel and lodging expenses will be invoiced separately based on actual costs (if applicable).

**Total Cost: \$861,350**

# Key Milestones, Deliverables, & Timeline

Key Milestones	Outcomes/Deliverables	Timeline
Identify all Job Performers and Stakeholder Personas	Documented Customer Journey Map that calls out and identifies personas and stakeholders. The document must list personas, job titles, key performance indicators, skills, pains and obstacles.	8/1/2022 – 9/30/2022
Conduct Workshops with Job Performers	Align the Job Performers to optimize the number of workshops with supplied internal resources. Documented Customer Journey Map that calls out and identifies personas and stakeholders. The document must list personas, job titles, key performance indicators, skills, pains and obstacles	10/1/2022 – 12/16/2022
Co-facilitate with Customer Cohorts	Updated Best Practices Guide entries.	1/16/2022 – 3/17/2023
JTBD Report with all JTBDs identified, prioritized, and supported by measures of success	Currently Salesforce JTBD segmentations are aligned to JobTitles. We would like recommendations on how to align JTBD segments according to job families/ outcomes. Vender can then create new Journey Maps along recommended group lines once approved by salesforce.	3/20/2023 – 4/28/2023
Journey Maps Created	Personas, Journey Stages/Phases, Tasks, persona quotes	5/1/2023 – 5/26/2023
Service Blueprint created	Configurable, extendable, using Figma or other similar design tool.	6/5/2023 – 6/30/2023
Jr. Business Architect	Jr. Business Architect with a Quote to Cash background with Flexible hours available to support Best Practice and SF Lead Business Architect	8/1/2022 – 6/30/2023

## ASSUMPTIONS

- Work across several teams within Revenue Solutions and throughout the organization's cross-functional business units.
- Develop Service Blueprint using Figma or similar design tools. Tool should allow for dynamic interactions, configurations, and extendable for use with other journeys.
- 80% of the Persona, Customer Journey Map, and Service Blueprint work has been completed.
- Work with a small subset (8) of external customers.
- Provide a Jr. Business Architect with a Quote to Cash background to support Best Practice and our Lead Business Architect, as needed.
- Understanding this is a research project, and timing is flexible.

# Key Milestones, Deliverables, & Timeline

## PERSONA DELIVERABLE



### Mikayla Solution Strategist

A leader who oversees the tech stack for revenue management

**Role Type** Hybrid | Leader

#### Job Titles

- Solution Architect
- Technical Architect
- CPQ Solution Arch.
- Snr. Director or Pricing

#### Related Personas

- Platform Conductor
- Data Systems Arch.
- Bus. Ops Interpreter

"We operationalize the product strategy...We make sure the data is approved, accurate, and auditable."

#### Jobs to be Done

- Optimize pricing strategy
- Organize what we sell
- Define how we sell
- Determine products to sell
- Agree to sale conditions
- Record transactions
- Track goods & services

#### Key Performance Indicators

- Time to Value for Solution Delivery
- Adoption Rate
- Case Resolution rate for team
- User satisfaction
- Compliance (SOCHS, SLA)
- Cost Saving

#### Tasks & Responsibilities

- Gather, list business requirements
- Strategic project planning
- Team management, project delegation
- Advise developers
- Advise and align other business units
- Monitor platform usage dashboards
- Design, review new solution strategy

#### Skills

- Communication
- Product Expertise
- Translate requirements into solutions
- Cross-functional stakeholder mgmt
- Clicks not code
- Problem-solving
- Coaching/Training

#### Pains and Obstacles

- Hiring new talent/limited staff
- Cross-functional decision-making
- Competeing priorities
- Duplicate data in ERP and Salesforce
- Data lost between systems

#### Service Blueprint

Mikayala has proactively created a potential Customer Service Blueprint for Salesforce *click within this space to view her current work.*

\*\*Appears best on the Figma website, please [click here](#) to be redirected

# Key Milestones, Deliverables, & Timeline

## SERVICE BLUEPRINT DELIVERABLE

### Service Blueprint

As is (Retrospective)  To be (Prospective)



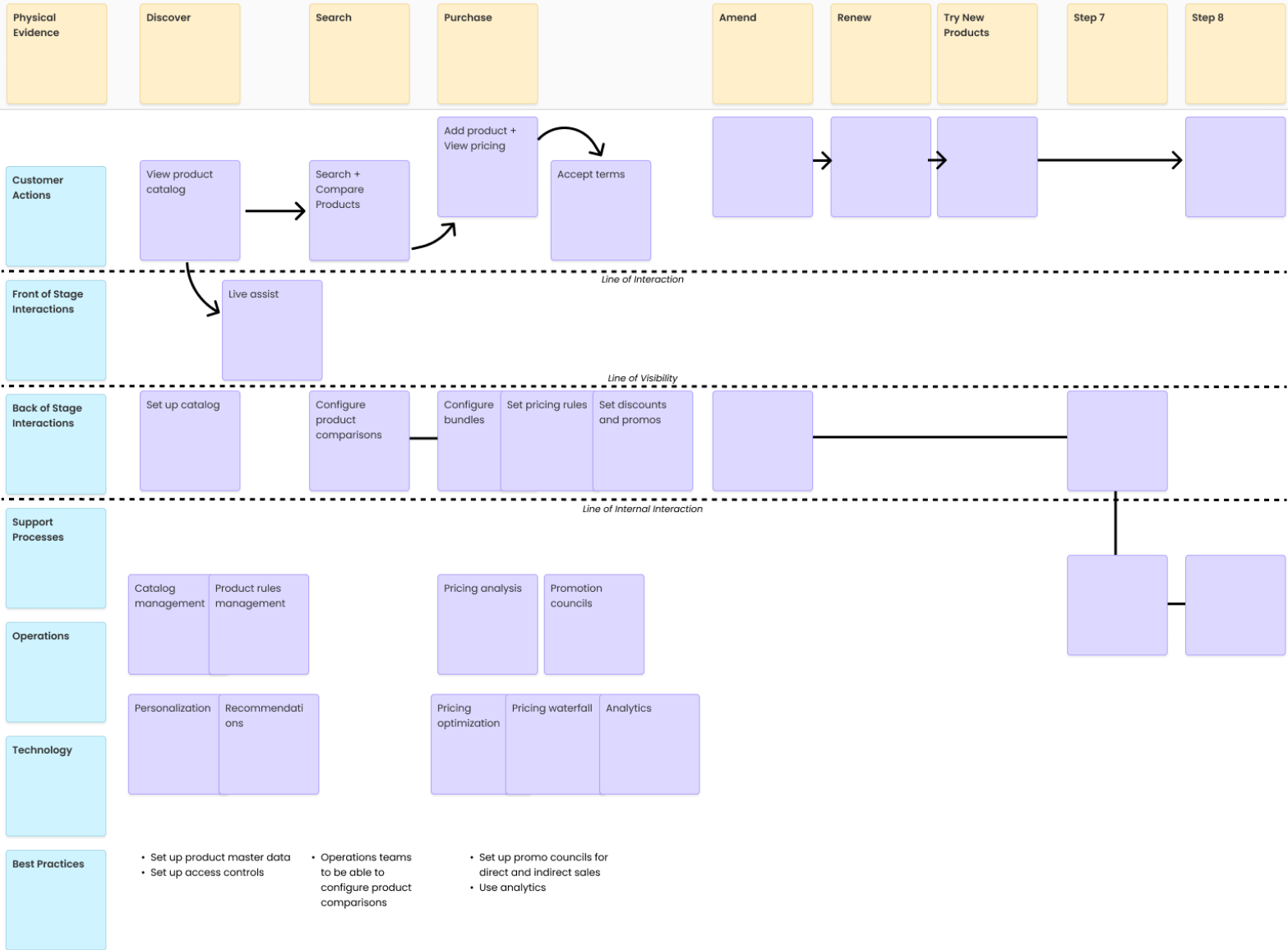
#### Mikayla - Solutions Strategist

A skilled cross-functional leader with the ability to design, and review new solution strategies leading to accurate and auditable data. *Click within this space to view her persona.*

#### Scenario & Goals

Mikayla is in the beginning stages of determining the customer journey stages for Salesforce, while also analyzing the underlying best practices for the company.

#### Customer Journey Stages



\*\*Appears best on the Figma website, please [click here](#) to be redirected