Single Source Addendum 1: Clarifications
Salesforce Implementation Services

Project consists of two implementations: Salesforce Enrollment Services and Salesforce Student Success Hub. As part of Minnesota State, Northland’s student information is stored in a homegrown information system, Integrated Statewide Records System (ISRS). Experience in working with this system is preferred. Implementation timelines are through May, 2022 for Enrollment Services, and through August, 2022 for Student Success Hub.

Enrollment Services Scope
- Salesforce CRM Setup
- Communication through Pardot
- Data Migration
- Salesforce Training
- Go-Live

Project Deliverables
- Requirements Gathering Sessions (2 Days – Two Hour Session Each Day)
- Create Project Plan and Task List utilizing Quip (Northland Community & Technical College will have access)
- 2 Hour Training Session
- Salesforce & Training Documentation Guide

Iteration 1 – Salesforce Setup
- Create Data Model
  - Lead
  - Account
  - Contact
  - Application
  - Campaign
  - Activity
- Lightning Page Layout Design
- Develop Account Hierarchy
• Define Security
• Reports and Dashboards
• 40 Hours of analytics development
• 30 Hours of Included Declarative Automation Development
• Test and Verify

Iteration 2 – Communication through Pardot
• Collaborate Marketing Strategy
• Technical Setup Guidance
• Map Fields to Contact Fields
• Engagement Studio Campaign Journey Training and Build in Pardot
• Training on Engagement Studio Components (Email Templates, Forms, etc.)
• Configure Landing Pages
• Configure Connector for Salesforce and Pardot
• Test and Verify

Iteration 3 – Mogli SMS Implementation
• Install Mogli SMS into the Salesforce Environment

Iteration 4 – Data Migration
• Data Mapping
• Data Transformation
• Data Migration into Sandbox Environment
• Data Migration into Production Environment

Innovate
• Conduct Training
  o End User Training – 2 Hours
• Test
  o Develop Test Plans
  o Run UAT
• Move to Production
• 7 days of Post Production Support
• Go-Live is defined as the deployment of functionality to production. The 7 days of post production support begin at this point.
Student Success Hub Scope

- Configuration of Education Data Architecture for the current student population
- Configuration of Student Success Hub
- Configuration of the Salesforce SSH Experience Site (Formerly Salesforce Community)
- Data Migration
- Salesforce Training
- Go-Live

Project Deliverables

- Requirements Gathering Sessions (Two – Two Hour Sessions)
- Creation of Solution Design Document
- Create Project Plan and Task List utilizing Quip (Northland Community & Technical College will have access)
- 2 – 2 Hour Training Session
  - End User Training
  - Admin Training related to this implementation
- Salesforce & Training Documentation Guide

Iteration 1 – EDA

- Data Model Creation
  - Account Contact
  - Affiliations Relationships
  - Up to 5 custom objects
- Lightning Page Layout Design
- Define Security
- 30 Hours of Included Declarative Automation Development
- Set up Single Sign-On
  - Gives access to users to both internal users and student users into the Experience Site
- Analytics
  - 40 Hours of Report and Dashboard Development

Iteration 2 – Student Success Hub

- Install and Setup of SSH
  - Success Teams (5 Customized Success Teams) Success Plans (3 Templates)
  - Alerts
- Appointment Scheduling
• 3 Custom Trigger Based Automations Through Process Builder in Addition to the Following:
  • Case Assigned to Advisee Contact Record
    ▪ Case Team Assigned to Advisee Case Record
  • Implement Einstein Activity Capture
    ▪ Email, Contact and Event integration

Iteration 3 –Salesforce Student Experience Site
• Develop Student Experience Site
• Enhanced Experience Template
  o Customizable Tile Menu Customizable Branding
• Experience Site to Include
  o Success Plans Tasks
  o Appointment Scheduling My Student Record

Iteration 4 –Pardot Implementation
• Install Pardot
• 10 Week Best Practices and Training for Configuration for Student Communications Collaborate
  • Marketing Strategy
    o Technical Setup Guidance Field
    o Engagement Studio Campaign Journey Training and Build in Pardot
    o Training on Engagement Studio Components (Email Templates, Forms, etc..) Configure Landing Pages (Up to 2)
    o Configure Connector for Salesforce and Pardot
• Test and Verify

Iteration 5 –Data Feed with ISRS
• Assist Northland in Data Mapping ISRS Data to Salesforce CRM
• Strategize Data to Come into the Environment
  o Provide API information for Data Model created inside Salesforce

Innovate
• Test
Develop Test Plans Run UAT

- Training Sessions
  - 2 Hours – End User Training
  - 2 Hours – Admin Training

- Admin training is based on functionality built within this implementation. This training is not meant to make client staff ready for admin certification
- Move to Production

Go-live

- 14 days of Post Production Support
- Go-Live is defined as the deployment of functionality to production. The 14 days of post production support begin at this point.