

STATEMENT OF WORK

—
Private and Confidential

WESTERN UNION CONSOLIDATION OF EU & US ORGS

Prepared for
Tim Keane

Proposal Issued
24/11/2020

Consleague Consulting Ltd.
No.1 Poultry, London EC2R 8EJ

London | Bangalore

TABLE OF CONTENTS

| | |
|--|----|
| Cover Page ----- | 1 |
| Contents ----- | 2 |
| Statement of Work ----- | 4 |
| Signature of Agreement ----- | 7 |
| Appendices ----- | 8 |
| Appendix 1 - Scope of Delivery ----- | 9 |
| Appendix 2 - Out of Scope Delivery ----- | 10 |
| Appendix 3 - Risk Statements ----- | 11 |
| Appendix 4 - Delivery Methodology ----- | 12 |
| Breakdown of Costs ----- | 14 |



Great companies are built
on great products.

Elon Musk



STATEMENT OF WORK

This Statement of Work of the date referred to below is between:

(1) **Consleague Consulting Ltd, incorporated in England and Wales with its registered office at No.1, Poultry, London EC2R 8EJ ("Supplier");**

and

(2) **Western Union Payments Services Ireland Limited UK Branch, 200 Hammersmith Road London, United Kingdom, ("Client").**

ENGAGEMENT PURPOSE

To collaboratively facilitate and deliver activity that results in the consolidation of two Salesforce Org's (namely US and EU) into a singular Salesforce Org (US). Including activities as described below and elaborated within the appendices of this document.

- Design and Analysis
- Configuration and Build
- Quality Assurance
- Demonstrations
- Migration of code and configuration between orgs
- Implementation of required third party tooling and components
- Project Management and Business Consultancy
- Engagement Management

Contained in full detail within the appendices of this document

- Scope for delivery
- Excluded Scope
- Scope at risk due to complexity and available time
- Recognised risks
- Delivery methodology statement

TIME TABLE

Engagement to commence 26th October 2020 and conclude billable activity on 31st January 2021.

RESOURCE MODEL

UK based engagement management, project management and business consultants paired with a dedicated offshore technical delivery team

ENGAGEMENT COST

The cost of engagement is based on time and material. The estimated cost of the project based on the scope derived from the Feasibility study is \$131,345 + VAT (Invoiced in GBP).

*The actual billable will be driven by time logs submitted.

Dan Gwalter
Director, Solutions

SUPPLIER MANAGER

Mohan Elango

CLIENT MANGER

Tim Keane

ADDRESS FOR NOTICES

Supplier

No.1, Poultry, London EC2R 8EJ

Client

Western Union Payments Services Ireland Limited
UK Branch
200 Hammersmith Road
London, UK.

PLACE OF PERFORMANCE

Primarily Consleague Offices with workshops at the client site if required or feasible.

CHARGES

Given the limited nature of this engagement charges will be calculated based on committed time logs and presented to the client monthly as part of the agreed project management report.

HOURS OF SERVICE

Flexible as required to accommodate an engagement that extends to globally disparate territories.

NOTICE PERIOD (FOR TERMINATION)

45 days.

It will be the responsibility of the Client Manager to inform the Supplier Manager in the event that the agreement is to be terminated such that the Supplier Manager may initiate the process for the closure of the engagement and carry out the required housekeeping activities.

TERMINATION CHARGES

Factoring in the resource assignment for the engagement with tight deadlines, the 45 days notice period covering the cost of the dedicated resources.

SCOPE OF SERVICES

No expenses have been agreed for this engagement and none are permitted as part of this statement of work without prior written consent from the Client Manager

SIGNATURE OF AGREEMENT

Agreed on behalf of

Western Union Payments
Services Ireland Limited

Date:
24/11/2020

Consleague
Consulting Ltd

Name: _____

Signature

Date: _____

Role: _____

Western Union
Payments Services
Ireland Limited

Name: _____

Signature

Date: _____

Role: _____

APPENDICES

APPENDIX 1 - SCOPE OF DELIVERY

NOTES

- Scope below to be reviewed and confirmed by Client SME
- Items marked in green below are understood to be either low in complexity or have an assured solution agreed and are therefore considered within scope
- Items marked in amber are either med or high in complexity ,or, have outstanding associated questions to address. At this point we believe that these items remain in scope, however risks are recorded against this items that must be managed in order to achieve 100% scope delivery. In the event that one of the identified risks crystalizes we have mitigation plans in place that will deliver the required functionality within the agreed time frame albeit at a lower functional level than desired if the solution is to be considered complete (MVP)

| SN | DETAILS |
|----|---|
| 1 | Web to Lead set up in US org for EU website |
| 2 | Field Cleanup from standard object - Lead, Account, Contact, Opp in EU Org |
| 3 | Remediation of Limits on standard object post org merge. |
| 4 | Field Cleanup from custom object in EU Org |
| 5 | Field history tracking optimisation for merging with US fields on Standard Object |
| 6 | Enhancement on Account object in US org to accomodate EU business process. |
| 7 | Security Module merge with US org for Standard objects |
| 8 | EU Profile Set up in US org |
| 9 | EU User, Roles and Hierarchy Set up in US org |
| 10 | Custom object, field and Page Layout creation in US org |
| 11 | Review and Merging Dynamic Dashboards to remediate limit issue. |
| 12 | Apex Class and trigger optimisation and merging for Standard object. |
| 13 | Migrating Apex class and trigger from EU to US org for custom objects |
| 14 | Review and Migrate Workflows, Approval Process, Email Alerts, Process Builder and |
| 15 | Review and Migrate Lead Assignment Rules, User Queues, Public Group |

APPENDIX 1 - SCOPE OF DELIVERY

| SN | DETAILS |
|----|--|
| 16 | Integration - Enhancement in Medallia survey to include EU data |
| 17 | Integration with DV - Enhancement in Staging tables on DV org to send EU data to |
| 18 | WUAMS to EU Talend Integration - Enhancement in Staging tables on WUAMS to send EU data to US org and updating End point in integration. |
| 19 | US to EU SF- SF integration |
| 20 | Third-Party Apps - Conga Composer and Xactly Incent |
| 21 | Third-Party App - SkyVisualEditor |
| 22 | Lightning Conversion of Components |
| 25 | Merge EU process to US Process - Independent Accounts - Digital Enrollment |
| 26 | Enhancement in US Org - Independent Accounts - Paper Enrollments |
| 27 | Enhancement in US Org - Independent Accounts - Re-enrollment request |
| 28 | Enhancement in US Org - Independent Accounts - WUPSIL Agent Enrollments |
| 29 | Enhancement in US Org - Return to Sales Process (R2S)Flows |
| 30 | Enhancement in US Org - Further Location |
| 31 | All EU Reports and Dashboards |

APPENDIX 2 - OUT OF SCOPE FOR DELIVERY

NOTES

- Items highlighted below are considered out of scope for this phase of delivery due to time constraints and complexity of the required effort.

| SN | DETAILS |
|----|---------------------------------------|
| 1 | Data Load for Performance Metrics |
| 2 | Data Migration from EU to US Org |
| 3 | DV org related complex design changes |

APPENDIX 3 - RISK STATEMENTS

NOTES

- Risks have been identified as part of the initial planning process and will be discussed in due course with WU SME's to ensure that appropriate mitigation is achieved throughout the project lifecycle.

| SN | Project Scope | Challenge | Mitigation |
|----|---|---|--|
| 1 | WUAMS integration update to receive and send data for Paper based enrolment to US org instead of EU Org | The WUAMs system is owned and managed by CTS team and their availability will have to be accounted for to achieve this scope. | SF to SF Integration can be established between EU and US org to use the existing EU to WUAMs integration on interim basis until WUAMs integration changes are done. Once integration is completed, SF-SF connection will have to be discontinued. |
| 2 | Object and fields review to determine the final list of objects and fields to be migrated. | The activity is dependent on Review by the WU team. | |
| 3 | Enhancement on DV to US org Integration | There might be few changes required on the DV org to accomodate the data flow change to US org for EU | |
| 4 | EU Data Migration to US Org | The storage on US org will have to purchased to accomodate all EU data. | |
| 5 | EU User migration to US Org | Additional user license will have to purchased in US org to accomodate all EU users. | The EU user licenses cost can be engaged in US org. |
| 6 | Dynamic Dashboard | All dynamic dashboard can not be configured due to unavailability of limits. | As immediate solution, dashboards can be configured as a static one and switched to dynamic when extra licenses are purchased. Dynamic Dashboard can be purchased from Salesforce in bundle o 5. |

APPENDIX 3 - RISK STATEMENTS

| SN | Project Scope | Challenge | Mitigation |
|----|---|--|--|
| 7 | Field History Tracking | As-Is field history tracking can not be achieved due to limits. | The core fields can be enabled for tracking initially and in Phase 2 of the project, custom solution can be done to enable tracking all required fields. Will be taken up once the code base and integration has been completed in US org |
| 8 | Optimisation of all Apex Classes and Triggers | Time constraint to optimise all classes and triggers, thus they will be migrated as it is. For Account object - optimisation and merging would be carried on. | |
| 9 | Non Availability of Key Stakeholders | Due to the upcoming holidays the non-availability of key stakeholders is a risk. | To have backfills during the absences and to keep all stakeholders informed in advance for planned leaves |
| 10 | Aggressive Timelines | Tight timelines will need close collaboration and quick sign off to proceed. | To have regular touchpoints and timely signoffs to be able to deliver on time. Any changes to scope to be considered as a CR. |
| 11 | Scope Creep | Constant changes to scope | To obtain requirement sign-offs on EU deliverable on a timely basis. |
| 12 | 3rd Party Dependency | Delays in sharing information from 3rd party Non responsive 3rd party | Keep all stakeholders informed in advance with respect to 3rd party dependency, so as to enable their availability in a timely manner. |
| 13 | Western Union Resources | The approved budget includes deliverable responsibilities from Western Union Resources. | Availability of resources for projects based on BAU activities will be reviewed on timely basis. Timelogs to reflect Consleague efforts, if cover needed. |

APPENDIX 4 - DELIVERY METHODOLOGY

Consleague operates a standard delivery methodology that provides both agile delivery of a solution through iterations, but, also at the same time delivers robust project governance that ensures the project remains within budget, that scope is delivered and that risks are carefully managed.

Within the planning process, a number of milestones have been identified where we feel it would be prudent to take a brief checkpoint to ensure that our understanding of scope and complexity has not materially changed. This checkpoint provides a mandated opportunity for us to escalate any challenges to the project sponsor ahead of those challenges becoming issues.

The project itself is documented and monitored utilising our Asana platform and associated project plan. The WU project team are to be onboarded within this platform to promote collaboration and the sharing of the following information

- Tasks, progress, questions and answers
- Minutes of workshops, meetings and other decision making forums
- Reference material in the form of designs and specifications
- Logs of Quality assurance and testing activity.

Project Governance

To ensure that the project is delivered in a controlled manner the following key disciplines are operated throughout the project lifecycle.

Project Progress Standup Meetings – anticipated as taking place twice per week the purpose of these meetings is to review progress over the last period and agree activity over the next. Any blockers or issues are raised here for discussion and agreement prior to escalation to the project sponsor if no solution of agreement can be reached.

Project Management Reporting (informal) – an informal project management meeting will be conducted at the sponsors discretion once per week to review overall progress, risks, threats to plan and budget consumption.

Project Management Reporting (formal) – at the end of each calendar month a formal project management report will be provided to the project sponsor outlining progress, support if required and budget performance. This report is considered an auditable asset and as such is presented as part of our own monthly billing cycle.

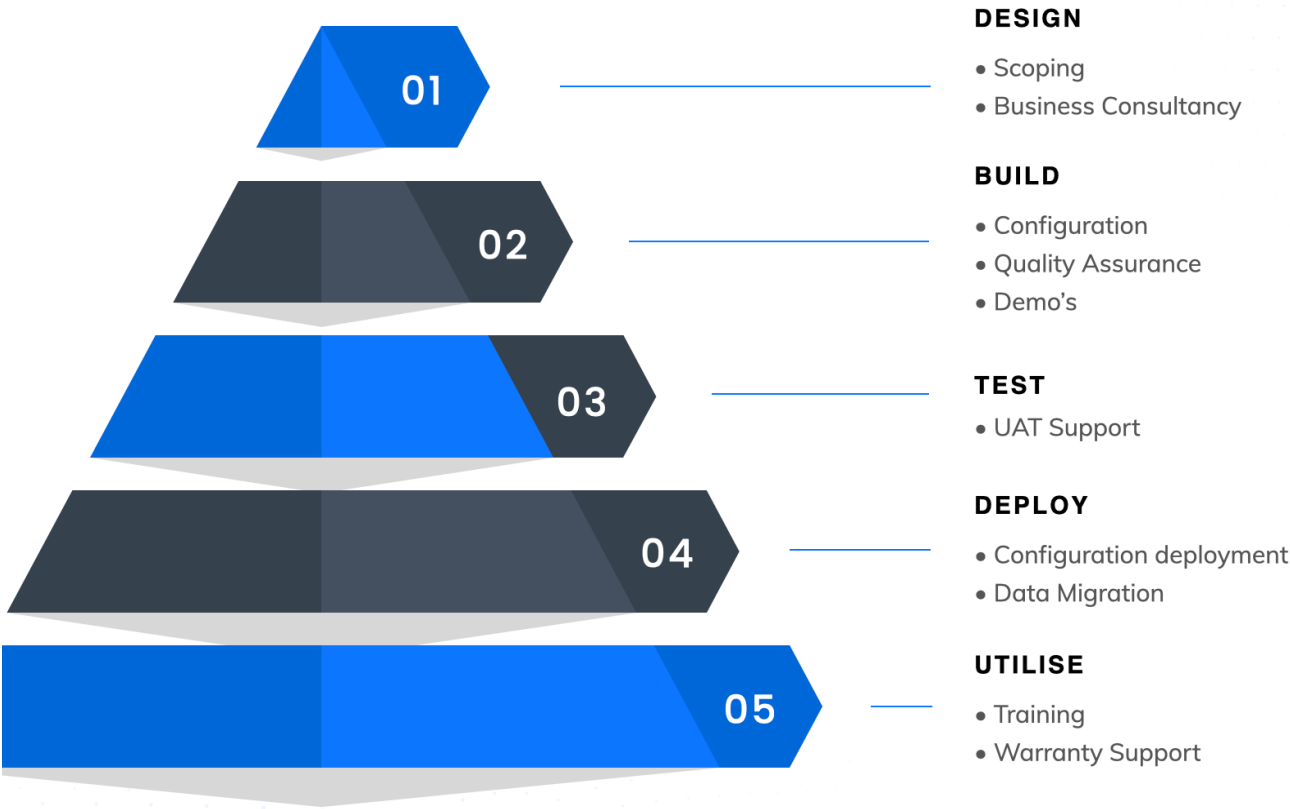
PROJECT LIFECYCLE

Throughout the project governance is applied to keep the project in good health, the following areas of interest are captured within the Governance activity

- Project Management
- Engagement Management

The warranty period commences at the beginning of the Utilise phase and once concluded the engagement is considered complete.

At this point the supplier manager shall issue the final project closure report and discuss with the client manager any follow-on activity, support or parked scope





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