

Integrated Marketing Solutions Ltd



Client XXX Europe

Solution Assessment and
Requirements Definition

June 2024

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Section 1: Approach and Deliverables

Overview

Client XXX Europe have been on a journey to implement Adobe Campaign across the various divisions within the business over the last 12 months to drive improved customer engagement and overall marketing effectiveness.

Having experienced some frustration with the current implementation, Client XXX have approached Integrated Marketing Solutions (IMS) to provide consultancy support to help them deliver an optimised solution for the B2B reseller solution as well as the future B2B and B2C configurations.

The immediate focus of this SOW is on the B2B Reseller solution and understanding Client XXX Europe's requirements from the solution.

Approach and Deliverables

In order to fully understand the current configuration as well as immediate business requirements, IMS propose the following activity within the next 2-3 weeks.

Solution Assessment

In order to fully understand the Client XXX solutions, we will need to audit the existing implementation / system configuration as well as the currently configured campaign activity / comms / channels.

1. Adobe / Client XXX to provide run book on current configuration.
 - Configuration / customisations
 - Schemas and links
 - Unsubscribe process
 - Security and permissions
 - Branding setup
 - Data sources
 - Data files
 - Data load Workflows
 - API integrations
 - Known issues and support history
 - Including any deliverability issues
 - Current build
2. Client XXX Europe to provide access to Adobe Campaign solution
 - Provide experience cloud access to ACS for named users

- Undertake review of system to understand
 - Configurations – data integration (uploads / APIs), system integrations, Schema additions and modifications, landing pages
 - Campaign activity – Types, frequency, complexity of programs. Trigger, Scheduled, Ad Hoc.

Requirements Definition

In order to fully understand requirements, we anticipate running a series of meetings / workshops with the following parties to define current activity / processes and also required future activity.

Ideally this will take place following the Solution assessment in order that IMS have a view on how the platform has been configured and changes required to enable what Client XXX Europe wish to do moving forward.

- Client XXX Europe marketing team
- Agency YYY - marketing agency
- IT Partner ZZZ - data agency
- Any other channel partners – eg SMS, Call centre

This is likely to be 1-day requirements workshop in Hemel Hempstead with all parties and then a follow up session, potentially in Dusseldorf with Client XXX Europe team to run through proposed development roadmap and agree approach and scope prior to next phase.

Outputs from this stage - IMS along with Client XXX Europe define the immediate and longer-term business requirements and outline the development roadmap / timelines to deliver against project objectives.

Dependencies and Logistics

- Legal approval of contracts
- Access to client solution
 - Passwords
 - User accounts
- Partner availability and location
 - Marketing agency
 - Data / Channel partners

Section 2: Costs and Timings

Resource and Cost Estimates

Based on experience we would anticipate the following resources as part of solution assessment and requirements definition.

Client	Man days	Day Rate £	Cost £
Solution Assessment – Current			
Solution configuration	1		
Data model and load process	0.5		
Integrations	0.25		
Channels	0.25		
Existing campaigns and deliveries	0.25		
Data exports	0.25		
Solution Assessment Total	2.5	£1000	£2,500
Requirements Definition			
Workshops / Planning sessions	6		
Roadmap development	2		
Requirements Definition Total	8	£1000	£8,000
Total	10.5	£1000	£10,500

The fees will be payable as set out in terms and conditions document for IMS engagement

Timings

Intention is to commence the work immediately with a view to delivering roadmap by end of week xxxxxx.