# STATEMENT OF WORK

{example SaaS software project}

CONTRACT ID: {unique reference}

DATE OF CONTRACT: {date}



FOR: ACME Company

PREPARED BY: Globex

Project: Ticket Linking Completion

## Version History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Change** | **Modified By** | **Date** |
| 0.1 | Initial draft | [Project Manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html) | 09/23 |
| 0.2 | Dev review | Developer | 09/30 |
| 0.3 | Correction of exchange rates | [Project Manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html) | 10/02 |
| 0.4 | PMO review | PMO | 10/03 |

## Distribution List

|  |  |  |
| --- | --- | --- |
| **Person** | **Role/Title** | **Approver (Y/N)** |
| A Smith | ACME Sponsor | Y |
| P Dole | Supplier Sponsor | Y |
| D Fred | PMO Director | Y |
| Tbc | ACME [Project Manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html) | N |
| T Leap | Supplier [Project Manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html) | N |

Contents

[STATEMENT OF WORK 1](#_Toc61467924)

[Version History 1](#_Toc61467925)

[Distribution List 1](#_Toc61467926)

[Business Challenges 3](#_Toc61467927)

[Solution Overview 3](#_Toc61467928)

[Project Deliverables 4](#_Toc61467929)

[Project Management 4](#_Toc61467930)

[Development 4](#_Toc61467931)

[Quality Assurance 4](#_Toc61467932)

[Administration Support 4](#_Toc61467933)

[Custom Report 5](#_Toc61467934)

[Risks](https://www.stakeholdermap.com/risk/risk-definition.html) 6

[Assumptions 6](#_Toc61467936)

[Overall project assumptions 6](#_Toc61467937)

[Technology Assumptions 7](#_Toc61467938)

[Exclusions 7](#_Toc61467939)

[Roles and responsibilities 8](#_Toc61467940)

[Onsite requirements 8](#_Toc61467941)

[Rates 8](#_Toc61467942)

[Fees Summary 8](#_Toc61467943)

[Payment Terms 9](#_Toc61467944)

[Expenses 9](#_Toc61467945)

[Signatures 9](#_Toc61467946)

# Business Challenges

ACME is an existing SaaS customer. In order to link tickets together to a root problem and be able to respond to those linked tickets in a single step, as well as providing ITIL methodology directives, Globex has provided a prototype configuration and customisation in order to achieve the desired functionality.

A further project was undertaken to include additional enhancements linked to this work and these have been provided in a test environment to prove the additional functionality.

ACME have approved the functionality of the prototype and require migration of the ticket management functionality into the production environment.

In addition, there is a requirement to provide management information in the form of a custom report for the functionality relating to ticket linking.

# Solution Overview

Globex has provided the description of the services to be performed in the [Deliverables](#_Deliverables:) section below. Further requirements and or customizations defined or requested by Customer after baseline acceptance of this Statement of Work could change the scope of this project and will be managed according to the Change Management process defined in the [Change Management Appendix](#Appendix_D_CHANGE_MANAGEMENT).

**The solution will eventually comprise:**

Customisation and Configuration functionality from Prototype to the production environment

Custom Reports for the new configuration / customisation

**Regional Interface and Language Requirements**

* acme : en\_GB
* acmeda : da\_DK
* acmede : de\_DE
* acmees : es\_ES
* acmefr : fr\_FR
* acmeit : it\_IT
* acmeus : en\_US

**Functional Scope:**

* Migration of customisations
* Custom report

**The proposed process for the Globex delivery is:**

* Project Management
* Application Development
* Quality Assurance Testing
* Support for Users

# Project Deliverables

The following section defines and explains the key deliverables for this Consulting servicesengagement**.**

## Project Management

Globex’s [Project Manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html) (PM) will be responsible for managing the level of effort associated with this Statement of Work. The PM will develop the Project Plan which describes the tasks, activities, [milestones](https://www.stakeholdermap.com/project-management/project-milestones.html) and timelines associated with this engagement. The [Project Manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html) will maintain a [risks](https://www.stakeholdermap.com/risk/risk-definition.html)/issues log and record project progress in the form of weekly status reports. A Delivery Manager will have responsibility for delivery assurance and will serve as an escalation point of contact for the [project team](https://www.stakeholdermap.com/definitions/project-team.html).

The Customer will designate one person to serve as [Project Manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html). The Customer’s [project manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html) will have authority to approve project-related services and may designate other individuals to act as [project manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html)s, subject-matter experts, and/or advisors during the engagement. The Customer will be responsible for the quality and timeliness of work performed by Customer in support of this project; any [schedule](https://www.stakeholdermap.com/project-dictionary/project-schedule-meaning.html) delays that result is subject to the hourly rates outlined in the Rates section of this document.

**Deliverables:**

**Project Plan:** documents project activities, ownership of those activities, [milestones](https://www.stakeholdermap.com/project-management/project-milestones.html), [schedule](https://www.stakeholdermap.com/project-dictionary/project-schedule-meaning.html), and dependencies.

## Development

Globex developer will migrate the required customisations from the prototype environment to the production environment according to the project plan.

## Quality Assurance

Globex will test the system as identified in the Project Plan and will certify the system is ready for Acceptance Testing.

ACME will be responsible for acceptance testing against its business requirements. This includes test planning and management, [test case](https://www.stakeholdermap.com/project-templates/test-case-template-excel.html) development, and execution of acceptance tests at the individual [test case](https://www.stakeholdermap.com/project-templates/test-case-template-excel.html) level. Globex services will be limited to assisting the Customer with [test case](https://www.stakeholdermap.com/project-templates/test-case-template-excel.html) execution, investigating the root cause of failed [test case](https://www.stakeholdermap.com/project-templates/test-case-template-excel.html)s and assisting with resolution (if applicable).

## Administration Support

Globex will provide support to ACME to the point of a successful deployment of the functional changes as agreed in the Project Plan.

Globex consultant will provide support to one designated ACME contact by way of an online workshop as to the functionality, management and maintenance of the configuration changes.

## Custom Report

Globex consultant will provide ACME with one standard Globex report as described in the Project plan and is likely to include the following filters and columns.

Fixed Filter: Ticket Type = Problem

Runtime Filters: Problem Assigned

Problem Product

Problem Priority

Problem Status

Problem Created date Range.

Columns (1st level) Problem Number

Problem Subject

Problem Assigned

Problem Product

Problem Priority

Problem Status

Count (Related Tickets)

Columns (2nd level) Ticket Reference

Ticket Subject

Ticket Assigned

Ticket Product

Ticket Priority

Ticket Status

Drill-down features will be provided by the use of Rollups. Initially the report will be in expanded mode – showing all (selected) problems and tickets. The user may click above the first collapse button to collapse all and the result is one problem per line with the count of tickets.

# [Risks](https://www.stakeholdermap.com/risk/risk-definition.html)

[Risk Assessment](https://www.stakeholdermap.com/risk/risk-assessment.html) is a process to identify, analyse, plan, track and control [risks](https://www.stakeholdermap.com/risk/risk-definition.html) related to the implementation of or integration with the Globex Software. There are potential [risks](https://www.stakeholdermap.com/risk/risk-definition.html) associated with the project that need to be addressed via a mitigation strategy. Below are the identified [risks](https://www.stakeholdermap.com/risk/risk-definition.html) associated with this project:

|  |  |
| --- | --- |
| **Risk** | **Mitigation** |
| Adoption of the software | Globex will assist with promotion of the tool and training. |
| Deployment of the changes | Globex will monitor the deployment of the integrated solution and adjust the project plan as necessary. |
| Resource availability | Secure approval from project sponsors to support project through completion. |
|  |  |

# Assumptions

Assumptions are factors used for planning purposes that are considered true, real, or certain. Assumptions help define scope and determine level of effort and timeframes.

## Overall project assumptions

1. This project assumes 7 Globex instances will be involved in this project in the following languages: English
2. The Services included in this Statement of Work will be performed: Offsite
3. Engagement Locations are: Globex offices.
4. The Customer will be charged for all travel and related expenses according to Globex’s travel policies unless otherwise noted. – Travel and related expenses will not be recharged as per agreement with ACME
5. Globex will provide a RNT Certified [Project Manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html) and may utilize Globex certified third party resources to complete some or all of the work on this engagement.
6. Customer will designate one person to act as a [project manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html). The Customer’s [project manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html) will have sole authority to approve and sign-off all project services as well as manage the project from the Customer perspective. For the purpose of daily operations, the Customer’s [project manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html) may designate other individuals to act as [project manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html)s, subject-matter experts, and advisors.
7. Globex will provide the Customer with weekly status reports and a [project charter](https://www.stakeholdermap.com/project-templates/sample-project-charter.html) documenting the project materials and [schedule](https://www.stakeholdermap.com/project-dictionary/project-schedule-meaning.html).
8. Customer will be responsible for the scheduling, availability, quality, and timeliness of work its resources perform. Any [schedule](https://www.stakeholdermap.com/project-dictionary/project-schedule-meaning.html) delays that result are subject to the billable rate illustrated in this document.
9. Client will be responsible for any acceptance testing against its business requirements, subsequent rollout phases of this project not specifically identified in this Statement of Work.
10. All services must be used within 12 months of purchase to avoid expiration.

## Technology Assumptions

1. The Customer’s IT organization is responsible for workstation compliance to Globex minimum requirements and any pre-installation activities (if applicable).
2. Customer is responsible for the purchase and installation of any third-party application/s. Globex is not responsible for obtaining data from 3rd party applications for integration purposes.
3. Customer is responsible for ensuring all data integrated with the Globex Service is in the proper format before it is integrated if integration is included in this Statement of Work.
4. Customer will provide Globex staff access to existing systems as they apply during the implementation, testing, and rollout of the Globex Applications.
5. Customer will be responsible for any acceptance testing against its business requirements, any pilot implementations, rollout, and any subsequent rollout phases of this project not specifically identified in this Statement of Work.
6. Globex will not modify any non-Globex application pages (i.e., pages that are a part of the core Customer website.)

## Exclusions

In addition to identifying the specific components that are included in the project, it is equally important to specify those components that are NOT included in the Statement of Work in order to manage expectations and scope. The following list of items is specifically excluded from this statement of work:

1. Analysis, documentation, or configuration of Security outside of the Globex application.
2. Analysis, documentation, development, or deployment of Data Exports to 3rd party external systems.
3. Offer Advisor Middleware, Computer Telephony Integration (CTI) and Voice Self-Service implementation.
4. Pass Thru Authentication (PTA), Application Programming Interface (API), and Premier Customization Access (PCA).
5. Formal training other than described in this Statement of Work.
6. Globex is not responsible for advanced Database, Operating System and Network configuration and/or troubleshooting are outside the scope of this Statement of Work. This includes, but is not limited to:

* Database Replication, Optimization or Partitions
* Router/Switch troubleshooting
* DNS issues and SSL configuration
* Internet Connectivity
* TCP/IP configuration
* Network Appliance setup/troubleshooting
* Web Server set-up and troubleshooting
* Remote Access Customer/server configuration
* Windows and/or any other OS Installation

# Roles and responsibilities

Detailed [Project Team](https://www.stakeholdermap.com/definitions/project-team.html) roles and responsibilities are defined in the [Project Charter](https://www.stakeholdermap.com/project-templates/sample-project-charter.html).

# Onsite requirements

The section identifies services & property that the Customer is to provide the Globex Consulting services team in support of the project while onsite.

1. Telephone service for local and long-distance calls that pertain to supporting the project.
2. Internet Access (network or dial-out)
3. Access to Customer’s computer hardware and software systems that apply to this project.
4. Work facilities to perform that required work that is stated within this project.

# Rates

Services provided under this Statement of Work shall be based on Globex standard consulting rates, which are listed below:

|  |  |
| --- | --- |
| **Role** | **Euros** |
| Developer | €1,200/day |
| Consultant | €1,200/day |
| Test Manager | €1,200/day |
| Education Trainer | €1,200/day |
| [Project Manager](https://www.stakeholdermap.com/project-dictionary/project-manager-meaning-definition.html) | €1,200/day |
| Business Development Manager | €1,200/day |

Globex may utilize a Globex certified third party vendor to complete all or some of the work specified in this statement of work. Documented below are the estimated Consulting services fees.

## Fees Summary

This estimate does not include travel and “out of pocket” expenses Globex may incur.

|  |  |  |  |
| --- | --- | --- | --- |
| CONSULTING SERVICE | | DAYS | FEE |
| Deliverable 1 | Project Management | 8 | € 9,600 |
| Deliverable 2 | Development | 6 | € 7,200 |
| Deliverable 3 | Quality Assurance Testing | 4 | € 4,800 |
| Deliverable 4 | Administration Support | 4 | € 4,800 |
| Deliverable 5 | Custom Report | 6 | € 7,200 |
| TOTAL: | | 28 | € 33,600 |

# Payment Terms

**Fixed Fee**

Globex will invoice the Customer following signature of this Statement of Work and payments shall be due net thirty (30) days from invoice date. Without limiting its rights or remedies, Globex shall have the right to halt or terminate entirely any services until payment is received on past-due invoices.

Customer shall pay to Globex a fee of thirty-three thousand six hundred Euros (€33,600) (“Fee”) for Services described in this Statement of Work, plus actual expenses incurred for the duration of the project.

# Expenses

Estimates do not include travel and related expenses Globex may incur in support of this engagement. Globex will send an invoice on a monthly basis for expenses incurred during the previous month. Payments for such invoices are due net thirty (30) days from date of invoice.

Terms & Conditions

Globex Standard Terms and Conditions govern this Statement of Work and may be viewed at http://www.globex.com/saas/agreements/master.html.

# Signatures

|  |  |  |  |
| --- | --- | --- | --- |
| Globex, Inc.  Consulting services | | ACME | |
|  | |  | |
| Name: |  | Name: |  |
| Title : | VP consulting services | Title: | Procurement Director |
| Date : |  | Date: |  |