Statement of Work for Microsoft Copilot Plugin Development

Trey Research and Woodgrove Bank

# Project Overview

The purpose of this project is to develop a custom plugin for Microsoft Copilot for Microsoft 365 that will allow institutional investors of Woodgrove Bank to access their account information within the Copilot interface. The plugin will be written in TypeScript and will run in Microsoft Azure. The plugin will use the Woodgrove Bank API to retrieve and display the account data, such as balance, transactions, portfolio, and alerts. The plugin will also allow the users to perform actions, such as transferring funds, buying and selling securities, and setting up notifications.

The project will be executed by Trey Research, a software consulting firm that specializes in Microsoft technologies. Trey Research will provide the following services:

* Project management and coordination
* Requirements analysis and design
* Development and testing
* Deployment and support

The project will be delivered in four phases, as described in the next section.

# Project Phases

The project will be divided into four phases, each with its own deliverables, milestones, and acceptance criteria. The estimated duration and cost of each phase are also provided.

# Phase 1: Planning and Analysis

The objective of this phase is to define the scope, objectives, and requirements of the project. The main activities and deliverables of this phase are:

* Conduct a kickoff meeting with the client and the stakeholders to establish the project vision, goals, and expectations.
* Review the existing documentation and systems of the client, such as the Woodgrove Bank API, the Microsoft Copilot platform, and the Microsoft Azure environment.
* Gather and document the functional and non-functional requirements of the plugin, such as the features, user interface, performance, security, and accessibility.
* Create a project plan that outlines the tasks, resources, schedule, budget, and risks of the project.
* Create a high-level design document that describes the architecture, components, and interfaces of the plugin.
* Present and validate the project plan and the high-level design document with the client and the stakeholders.
* Obtain the formal approval and sign-off from the client and the stakeholders to proceed to the next phase.

The estimated duration and cost of this phase are 4 weeks and $40,000.

# Phase 2: Development and Testing

The objective of this phase is to implement and test the plugin according to the requirements and design specifications. The main activities and deliverables of this phase are:

* Set up the development and testing environments in Microsoft Azure.
* Develop the plugin code in TypeScript using the Microsoft Copilot SDK and the Woodgrove Bank API.
* Perform unit testing and code review to ensure the quality and functionality of the code.
* Integrate the plugin with the Microsoft Copilot platform and the Woodgrove Bank system.
* Perform integration testing and system testing to ensure the compatibility and performance of the plugin.
* Conduct user acceptance testing with the client and the stakeholders to verify the usability and satisfaction of the plugin.
* Fix any bugs or issues identified during the testing process.
* Prepare the user documentation and the technical documentation of the plugin.
* Present and validate the plugin and the documentation with the client and the stakeholders.
* Obtain the formal approval and sign-off from the client and the stakeholders to proceed to the next phase.

The estimated duration and cost of this phase are 8 weeks and $80,000.

# Phase 3: Deployment and Support

The objective of this phase is to deploy and support the plugin in the production environment. The main activities and deliverables of this phase are:

* Deploy the plugin to the Microsoft Copilot marketplace and the Microsoft Azure cloud.
* Register the plugin with the Microsoft Copilot service and the Woodgrove Bank system.
* Provide training and guidance to the end users and the administrators of the plugin.
* Monitor and troubleshoot the plugin performance and functionality.
* Provide maintenance and updates to the plugin as needed.
* Provide technical support and customer service to the client and the stakeholders.

The estimated duration and cost of this phase are 12 weeks and $60,000.

# Phase 4: Closure and Evaluation

The objective of this phase is to close and evaluate the project. The main activities and deliverables of this phase are:

* Conduct a post-mortem meeting with the client and the stakeholders to review the project outcomes, achievements, and lessons learned.
* Prepare a final project report that summarizes the project scope, objectives, deliverables, milestones, costs, and benefits.
* Present and validate the final project report with the client and the stakeholders.
* Obtain the formal approval and sign-off from the client and the stakeholders to close the project.
* Archive and transfer the project documents and artifacts to the client and the stakeholders.

The estimated duration and cost of this phase are 2 weeks and $20,000.

## Risks and Assumptions

Identify and assess the residual risks that may affect the project closure or the post-project activities. Document the risk mitigation strategies and assign the risk owners. Communicate the risks and the mitigation plans to the client and the stakeholders. Obtain their acknowledgement and agreement on the risk management approach.

Some of the assumptions that the consultant is making are:

* The client will provide timely feedback and approval on the project deliverables and outputs.
* The client will assign a dedicated project manager and a contact person for the consultant.
* The client will ensure the availability of experts in the existing application and the business requirements.
* The client will grant the consultant access to the development environment and the necessary tools and resources.
* The client will support the consultant in resolving any technical issues or dependencies that may arise during the project.

## Intellectual Property Ownership

Clarify and confirm the intellectual property ownership of the project deliverables and outputs. Ensure that the project complies with the contractual terms and conditions regarding the intellectual property rights. Transfer the intellectual property ownership to the client and the stakeholders as per the contract. Obtain their confirmation and acceptance of the transfer.