

Sample Statement of Work (SOW) - Enterprise Resource Planning (ERP) Transformation Strategy and Consulting Services

Statement of Work (SOW)

Enterprise Resource Planning (ERP) Transformation Strategy and Consulting Services

1. INTRODUCTION

1.1 Purpose

This Statement of Work (SOW) describes the professional services to be provided by BroadAxis, Inc. (hereinafter "Consultant") to Harris County (hereinafter "Client") for Enterprise Resource Planning (ERP) Transformation Strategy and Consulting Services as outlined in Sub-Project 2 of the Information Technology Consulting Services RFP.

1.2 Background

Harris County, the third-largest county in the United States with over 4.7 million residents, is seeking to modernize, consolidate, and upgrade its PeopleSoft ERP system. The current ERP infrastructure supports multiple County departments and requires a comprehensive transformation strategy to enhance efficiency, improve user experience, and leverage modern cloud technologies.

2. SCOPE OF SERVICES

2.1 Project Overview

The Consultant shall provide comprehensive ERP transformation strategy and consulting services to guide Harris County through the process of modernizing its existing PeopleSoft ERP system. This will include business process analysis, technology assessment, implementation planning, and change management strategies.

2.2 Specific Deliverables

The Consultant shall provide the following deliverables:

1. ****Current State Assessment Report****
 - Detailed documentation of existing ERP systems and processes
 - Gap analysis identifying pain points and improvement opportunities
 - Stakeholder mapping and engagement plan
2. ****Commissioner's Court Presentation Package****

- Executive summary of approach and methodology
- Timeline for strategy development and implementation phases
- Resource requirements and preliminary budget considerations

3. ****Strategic Workshops Facilitation****

- Design and conduct 4-6 workshops with key stakeholders
- Document workshop outcomes and decision points
- Develop consensus on strategic priorities

4. ****ERP Vision and Strategy Document****

- Future state ERP architecture recommendations
- Business and technology driver framework
- Strategic roadmap with phased implementation approach

5. ****Implementation Planning Documentation****

- Detailed work breakdown structure for implementation
- Resource allocation and skill requirements
- Risk management and mitigation strategies

6. ****Change Management and Communication Plan****

- Stakeholder impact assessment
- Communications strategy and templates
- Training needs analysis and recommendations

3. PROJECT APPROACH AND METHODOLOGY

3.1 Phase 1: Discovery and Assessment (Weeks 1-4)

- Conduct stakeholder interviews and system documentation review
- Perform current state analysis of PeopleSoft implementation
- Identify integration points with other County systems
- Document pain points and process inefficiencies
- Establish baseline metrics for measuring success

3.2 Phase 2: Strategy Development (Weeks 5-10)

- Facilitate strategic workshops with County leadership
- Define business and technology drivers
- Develop future state architecture options
- Evaluate cloud vs. on-premise scenarios
- Create strategic roadmap with implementation phases

3.3 Phase 3: Implementation Planning (Weeks 11-14)

- Develop detailed implementation plan

- Create resource requirements and budget estimates
- Design governance structure for implementation
- Develop risk management approach
- Create change management and communication plans

3.4 Phase 4: Finalization and Presentation (Weeks 15-16)

- Finalize all deliverables
- Prepare and deliver Commissioner's Court presentation
- Document next steps and action items
- Transfer knowledge to County implementation team

4. PROJECT TIMELINE

The estimated project duration is 16 weeks from project kickoff to final deliverable submission.

| Milestone | Timeframe | Deliverables |

|-----|-----|-----|

| Project Kickoff | Week 1 | Project charter, communication plan |

| Current State Assessment | Weeks 1-4 | Assessment report, stakeholder map |

| Strategic Workshops | Weeks 5-8 | Workshop materials, decision documentation |

| Strategy Development | Weeks 8-10 | Vision document, architecture recommendations |

| Implementation Planning | Weeks 11-14 | Implementation roadmap, resource plan |

| Final Presentation | Weeks 15-16 | Commissioner's Court presentation, final documentation |

5. ROLES AND RESPONSIBILITIES

5.1 Consultant Responsibilities

- Provide skilled resources with expertise in ERP strategy and implementation
- Deliver all project deliverables according to the agreed timeline
- Facilitate all workshops and stakeholder engagements
- Provide weekly status reports and conduct project status meetings
- Identify and escalate issues or risks that may impact project success

5.2 Client Responsibilities

- Provide timely access to stakeholders for interviews and workshops
- Make available all relevant documentation about current systems
- Designate a project sponsor and project manager
- Review and provide feedback on deliverables within agreed timeframes
- Facilitate access to systems and data needed for assessment

6. PROJECT TEAM

Role	Responsibility	Estimated Hours
ERP Strategy Lead	Overall project management and strategy development	240
Business Process Consultant	Process analysis and improvement recommendations	200
Technical Architect	Technical assessment and future state architecture	160
Change Management Specialist	Stakeholder engagement and communication planning	120
Financial Systems Specialist	Financial process and requirements analysis	100
HR Systems Specialist	HR process and requirements analysis	100

7. PRICING

Resource Category	Hourly Rate	Estimated Hours	Total
ERP Strategy Lead	\$185.00	240	\$44,400
Business Process Consultant	\$165.00	200	\$33,000
Technical Architect	\$175.00	160	\$28,000
Change Management Specialist	\$155.00	120	\$18,600
Financial Systems Specialist	\$165.00	100	\$16,500
HR Systems Specialist	\$165.00	100	\$16,500
Total	**920**	**\$157,000**	

8. ACCEPTANCE CRITERIA

Each deliverable will be submitted to the Client's Project Manager for review. The Client will have ten (10) business days to review and either accept the deliverable or provide feedback for revision. The Consultant will address any feedback within five (5) business days of receipt.

Final acceptance of the project will be based on the completion and approval of all deliverables specified in this SOW.

9. ASSUMPTIONS AND CONSTRAINTS

9.1 Assumptions

- Client stakeholders will be available for interviews and workshops as scheduled
- Client will provide access to all necessary documentation and systems
- Decision-making authority will be clearly defined at project kickoff
- The scope of the assessment will be limited to the core ERP functions
- Client will designate resources for knowledge transfer and implementation planning

9.2 Constraints

- Project timeline is dependent on stakeholder availability
- Recommendations must align with Harris County's IT governance policies
- Solution must comply with all applicable regulations and standards
- Project is subject to the County's MWBE Program requirements
- All software recommendations are subject to I2PSG committee approval

10. CHANGE MANAGEMENT

Any changes to this SOW must be documented in a Change Request and approved by authorized representatives from both the Consultant and the Client. Changes may impact project timeline, scope, and/or cost.

11. SIGNATURES

This Statement of Work is hereby incorporated into the Master Services Agreement between BroadAxis, Inc. and Harris County.

****For BroadAxis, Inc.:****

Name: _____

Title: _____

Signature: _____

Date: _____

****For Harris County:****

Name: _____

Title: _____

Signature: _____

Date: _____