# 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

#### 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

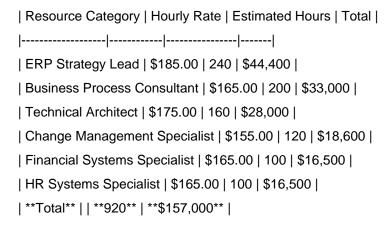
#### 5.2 Client Responsibilities

- 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



#### 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:
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