STATEMENT OF WORK NO. <xxxx><Version No.>

|  |  |
| --- | --- |
| BILL TO: <Company name and address>  *For example-* ***ACME Systems Accounts Payable Division P.O. Box 700, CA Atlanta Georgia 300318 United States*** | SHIP TO: <Company name and address>  *For example-* ***ACME Systems Accounts Payable Division P.O. Box 700, CA Atlanta Georgia 300318 United States*** |

1 General Terms and Conditions

## 1.1         Governance

This statement of work (“SoW”) is entered into between the involved parties (*automation beneficiary and automation benefactor*) and is subject to the negotiated agreement in force between the parties.

## 1.2         Responsibilities

The automation benefactor is responsible for performing the services described in section 3 of this SoW in accordance with the estimated schedule of delivery therein. If the automation beneficiary requests additional services, the parties may mutually agree to amend this SoW through a SoW change order form.

In support of this effort, both parties shall:

* *<mention coordination/collaboration efforts on any changes in SoW/adjusting project schedules in the event of delays beyond the control of either party>.*
* *<confirmation on completion of services (refer services section) and resolution of any open issues>.*

Further, both parties must mutually agree upon:

* *<submission of tangible deliverables>.*
* *<any milestone completion/closure form>.*
* *<period within which deliverables need to be acknowledged>.*

Automation beneficiary’s responsibilities:

The automation beneficiary must work on providing the following details to the automation benefactor:

* *<Contact person(s) with decision making authority, who will ensure the involvement of relevant departments and personnels to facilitate project success>.*
* *<Relevant hardware and software, licenses, servers, networking devices, datacenters>.*
* *<Appropriate rights to use/modify any software/products/files/data as part of the agreement, while ensuring there is no breach in any third-party agreements>.*
* *<Secured remote access to required systems (if any)>.*
* *<List of approved processes to be automated (along with any relevant checklist to evaluate before the start of the project>.*
* *<Dummy data>.*

Automation benefactor’s responsibilities

The automation benefactor must work towards:

* *<Performing the services described under section 3 of this SoW>.*
* *<Update the automation beneficiary of any change in timeline>.*

## Assumptions

*<Mention assumptions around availability of qualified resources, test data, software/hardware/application access>.*

## 1.4         Payment

*<As per the agreement, for the services provided by automation benefactor>.*

## 1.4.1     Fixed Fee Postpaid

*Automation beneficiary to be invoiced with <full amount> at the completion and acceptance of milestones.*

## Change management

*<Ensure whether a change management (change control and governance) process is in place or needs to be developed in collaboration with the stakeholders. List down the change management process>.*

1.5.1      For Fixed Price Services

* *<List the fixed price services. Any deviation in the services’ scope/timelines must be brought to notice of both parties and a consensus should be reached on the same>.*
* *<List down the process to be followed in case of such deviations/changes>.*

## 1.6         Term

*<The effective date on which this SoW is signed by both parties. Along with that mention the duration for which the agreement holds valid (end date, unless extended)>*

## 1.7         Points of Contact

|  |  |
| --- | --- |
| <Automation benefactor name> | <Automation beneficiary name> |
| Name: *<Timmy Robot>* | Name: *<John Smith>* |
| Title: *<Enterprise Sales Executive II>* | Title: *<Sr. Manager>* |
| Email: *<timmy.robot@hypothetical.com>* | Email: *<john.smith@abmail.com>* |
| Phone: *<8090234567>* | Phone: *<4041232023>* |

## 1.8         General

This SoW is the complete and exclusive agreement between the parties with regard to its subject matter, and supersedes all prior oral or written proposals, agreements, representations and other communications between the parties with respect to the services described herein; and will apply in lieu of any different, conflicting or additional terms and conditions which may appear on any order or other document submitted by either party.

Each party agrees that the electronic signatures, whether digital or encrypted, of the parties included in this SoW are intended to authenticate this writing and to have the same force and effect as handwritten ink signatures.

|  |  |
| --- | --- |
| Signatures | |
| *<Automation benefactor name>* | *<Automation beneficiary name>* |
| *<Automation benefactor address>* | *<Automation beneficiary address>* |
| *By* | *By* |
| *Title* | *Title* |
| *Date* | *Date* |
| *Signature* | *Signature* |

2 Pricing Schedule

*<Mention the milestone payment fees>*

2.1 Service #1 Milestone Fees Table – Process Automation

Create a service milestone fees table.

Location refers to the location of delivery resources. A sample is shown below for your reference.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Svc No. | Milestone | Description | Location | Fees Type | Standard Fees (USD) | Overall Discount (USD) | Overall Cost (USD) |
| 1 | Milestone 1 | Medium Complexity Process Automation 1 - Design | LATAM, United States | Post paid | US$ 25,000 | US$ 5,000 | US$ 20,000 |
| 1 | Milestone 1 | Medium Complexity Process Automation 1 - Build | LATAM, United States | Post paid | US$ 30,000 | US$ 10,000 | US$ 20,000 |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  | US$55,000 | US$15,000 | US$40,000 |

Automation complexity assessment

The following table lists the parameters for assessing automation complexity. Automation benefactor will use these parameters as inputs to determine the complexity for each process automation.

|  |  |  |  |
| --- | --- | --- | --- |
| **Parameter** | **Low Complexity** | **Medium Complexity** | **High Complexity** |
| **Definitions** | Process uses simple, rule based, strictly defined automations, data inputs are structured. Process does not have any manual non digital inputs like scanned images, unstructured, handwritten documents etc. where decision making must be made by a human to proceed. | Process does not have any manual non-digital inputs like scanned images, unstructured, handwritten documents etc. where decision making must be made by a human to proceed.  Process has a maximum of simple binary decision-making steps like Yes/No etc. Processes might require an attended version of automation. | Processes have handoffs between sub-process and the linkages must be accurately managed. Processes with HITL (Human In the Loop) requirement unstructured inputs. |
| **# of Applications** | 0-3 | 3-5 | 5-7 |
| **# of fields** | 1-99 | 100 - 200 | 201- 300 |
| **# of screens** | 0-10 | 11-20 | 21-30 |
| **# of variations / scenarios** | 0-3 | 4-6 | 7-8 |
| **Strict process SLA to be adhered to** | NA | Yes | Yes |
| **Image based automation** | NA | NA | VDI/Remote Desktops |
| **No of Input Formats** | 2 - 3 | 3-5 | 5-7 |
| **Doc Understanding/AI Center** | No | No | Potentially Yes - based on further evaluation |

3. Service #1 description – Process automation

3.1 Services overview – Process automation/Opportunity identification

*<Automation beneficiary> wishes <Automation benefactor> to deliver the <process automation/opportunity identification> service.*

*<Automation benefactor> will work with <automation beneficiary> to deliver this engagement over a <X> week time-period.*

*This project will be delivered <remotely/on-site>.*

3.2 Scope of Services – Process automation/Opportunity identification

*<Automation benefactor> will deliver the following:*

|  |  |  |  |
| --- | --- | --- | --- |
| **Service** | **Units** | **Location** | **Process Name** |
| *<Medium complexity process automation>* | *<X>* | *<Mexico, United States>* | *<X TBD medium complexity processes>* |

Key Assumptions:

* *Based on <automation benefactor’s> current understanding, the process will be of complexity as shown above (see the complexity criteria in the automation complexity assessment table).  If during the detailed process analysis and the generation of the Process Definition and Solution Design Documents for each process, higher complexity is discovered such as more complex exception handling, automation beneficiary will be given an option to either de-prioritize some functional requirements to remain cost-neutral or to increase the scope and cost through a change request.*
* *Infrastructure is set up, access is granted for developers and service accounts, and test data is provided before the start of week <X>.*

*<Automation benefactor>* will kick-off the engagement:

* Identify and introduce team members.
* Walkthrough the project with automation beneficiary’s stakeholders.
* Confirm the project timeline.

For each *<process automation>* in scope for this engagement, *<automation benefactor>* will deliver the following:

* Process Definition Document
* Solution Design Document
* Test case document
* Sign-off on documents
* Key automation beneficiary dependencies:
  + Up to 2 cycles of review changes are considered as part of the scope, any further changes will have an impact on the overall delivery timelines.
  + Access to meeting the stakeholders & studying underlying applications.
  + Access to permission to take screen capture for documentation and feasibility analysis.
  + Automation beneficiary to provide dedicated SMEs for the purpose of: 1) understanding the processes at a detailed level, 2) Provide walkthrough of processes in a production environment, 3) provide answers to business-related queries that might occur during development, testing & deployment, and 4) to enable the availability of test data & test-scenarios prior to initiation of development.

For each *<process automation>* in scope for this engagement, *<automation benefactor>* will build and test the automation:

* Build process automation.
* Unit test process automation.
* Support User Acceptance Testing (UAT) of process automation.
* Remediate UAT’s high and medium severity software defects of process automation.
* Sign-off on UAT
* Key automation beneficiary dependencies:
  + Development timelines will be considered from the time of PDD sign-off.
  + Any outage due to the underlying application downtimes will impact the overall delivery timelines.
  + Any delays in the sign-off of PDD & SDD documents will impact on the overall delivery timelines.
  + Automation beneficiary is responsible for executing UAT tests.  Automation benefactor will support the automation beneficiary testing by triaging discrepancies and remediating defects.
  + Automation beneficiary to enable access for all development team members to their development & test environments.
  + Automation beneficiary to ensure Development, UAT, and Production application environments are in sync.
  + Technical support from automation beneficiary’s IT team during deployment & hosting process.

For each <process automation> in scope for this engagement, <automation benefactor> will deploy and handover the process to the automation beneficiary’s Ops team:

* Sign-off on UAT.
* Sign-off on production readiness.
* Produce hand-off documentation.
* Conduct handover meeting with automation beneficiary’s Operations team.
* Review code with automation beneficiary’s development staff.
* Provide one (1) week of post-deployment production support (Hypercare).
* Key automation beneficiary dependencies:
  + <Automation benefactor> assumes that ongoing post-deployment production support will be handled by automation beneficiary.
  + Automation beneficiary will identify post-production support resource to shadow <automation benefactor’s> resources during the UAT period for the purposes of knowledge transfer.

3.3 Deliverables – Process Automation

The following deliverables are in scope for this service:

* Project timeline.
* Weekly project status report.
* Process documentation for each process in scope for this engagement.
* Build and Unit test for each process in scope for this engagement.
* UAT test software defect remediations for each process in scope for this engagement.
* Production migration for each process in scope for this engagement.
* Operations handover documentation for each process in scope for this engagement.
* One (1) week of post-deployment production support Hypercare for each process in scope for this engagement.

3.4 Roles and Responsibilities – Process automation

The following is a list of roles and responsibilities for this service:

|  |  |
| --- | --- |
| **Role** | **Skills** |
| Automation Business Analyst | * Business analysis assistance * Best practices mentoring * Business requirements discovery * Process analysis * Process Definition Documentation |
| Automation Developer | * Automation development assistance * Best practices mentoring * Automation process development * Automation process unit testing * Automation process UAT testing defect remediation * Automation process deployment * Automation process post-install support (Hypercare) |
| Automation Solutions Architect | * Solution Architecture assistance * Best practices mentoring * Solution design * Solution Design Documentation |
| Project Manager | * Project management assistance * Best practices mentoring * Customer coordination * Risk/Issue management and escalation * Project reporting * Financials management |
| Engagement Manager | * Engagement management assistance * Best practices mentoring * Customer coordination * Risk/Issue management and escalation * Project reporting * Financials management |