McGill Analytics Consulting course
Statement of Work
Terms and Agreements

Section 1A: Parties

The following is an agreement for and Industry-Academic partnership created on September 26th, 2022 for analytics consulting work to be done in partnership between:

McGill Masters of Management in Analytics Student Consulting Team under the McGill Analytics Consulting Course (BUSA 611) with its principal activities conducted at 3420 McTavish, Montréal, QC H3A 0E2, Canada:

(hereinafter referred to as 'MMA' or 'MMA Students' or 'Student Consultants' or 'Analytics Team')

And

Autodesk Canada Inc

10 Duke Street, Montreal, Quebec, Canada, H3C 2L7

(hereinafter referred to as 'Industry Partner' or 'Partner' or 'Client' or 'Autodesk')

Section 1B: Introduction/Background & Objectives

Who: The project will support the internal Analysts/Developers in the Data Analytics team at Autodesk Entertainment and Media Solution team (EMS) for product selection and attributes related decision making. The project will only be used internally if goes beyond proof of concept stage.

What: The project will deliver a proof of concept stage of website that generates waypoints and corresponding attributes to Autodesk's product. The data analytics team at Autodesk lacks a centralized website that could generate and provide the list of attributes that internal users need. These attributes and waypoints can be translated into product usage information that could be used to help improve product quality and understand customers' needs better.

How: The outcome will be a Figma design and a website. The project will overall deliver an executive summary containing its business objective, a UX/UI design using Figma, and several scripts for the final website. I will start on September 26th, and will complete the business objective and UX/UI design by October 17th. The draft of the website will be completed around November 14th, and the final solution will be submitted by December 12th.

SECTION 2A: SCOPE OF WORK

The Analytics Team intends to do a deep dive into the following one uses cases requested by Autodesk. The scope will define the boundaries related to the analysis and project deliverables

Thus, for this phase, the scope of the work will be limited to:

- Currently there is no such website or interface that could provide the corresponding attributes to Autodesk's product. They have a manual script that could return the desirable output, but they lack the interface for users to easily access.
- I will deliver a proof of concept stage of website that returns the desired attributes of certain product so that there will be this centralized platform where internal users at Autodesk can go and request for needed information.
- The project will mainly focus on technology and user section. The technology section will help the project to have the working new platform, and the user section will help to achieve a creative and practical environment.
- The boundary of the project would be the limited data resources. I will not use large datasets to test out the website, instead I will just use a simple JSON file. But this leaves future extension of the project if needed, as we can consider connecting it to an existing database.

Out of Scope

The McGill Analytics projects are designed to be 'Proof of Concept' –like works to help Industry Partners advance a current problem solution or uncover a new problem solution. Thus, the aim of the outcomes is <u>not</u>:

- Production level/ready models or solutions
- Training beyond handoff meeting
    - If additional time is requested by the client, any additional time spent with clients after close of the project is at the full discretion of the Student Consultant

Change Requests:

All change requests after the signing of this SOW will be recorded in Appendix: Change Request and will be executed if agreed by both parties

SECTION 3A: DELIVERABLES & MILESTONES

The below list consists of the initial milestones identified for the Project McGill-Autodesk:

Milestones (Deliverable)	Target Date	Comments
1. Business objective & design due	Oct. 17th	Follow up with manager to ensure the design and objective is on the right track
2. Draft of the website due	Nov. 14th	Talk to manager and stakeholder for feedback and improvements
3. Solution Delivery	Dec. 12th	Final submission, hand over meeting with professor and Autodesk supervisor

SECTION 3B: CONTENT DELIVERABLES BREAKDOWN

As part of the McGill-Autodesk project, the Student Consultants will be responsible for performing tasks throughout various stages of this project. The following is a list of these tasks which will result in the successful completion of this project:

This section of the SOW will focus on the Target state:

i. Project Value Proposition

- The pain point is the lack of such platform that could centralize users' request for product's attributes, and having the easy access to the data points. The project will only assist the Data Analytics team under the Entertainment and Media Solution team (EMS) at Autodesk.
- In the final submission slides, I will talk more in depth of how this website will help with team's business goal.

ii. Technical Solution Analysis

- To create the website, I will mainly focused on using HTML, JavaScript, and CSS. At the meantime, I will self-learn more detailed methodologies of creating websites.
- Here are some potential resources for me to self-learn web development:
    i. https://weblab.mit.edu/schedule/
    ii. YouTube lectures
    iii. Udemy courses
- Data will be in JSON format and it is provided by the supervisor at Autodesk. It will be in file format for now. Scalability problem will be considered once the draft of the website is complete.

iii. UX/UI

- Figma will be used to create the user experience web design.
- Features to consider to include in the webpage are: a searching bar, a drop down menu, and a display area to show corresponding data, and a button for download.

SECTION 4A: SUCCESS METRICS

The goal of this project phase is to advance the project analysis into actionable strategies. The project intends on helping our partners drive to this value and outcome through the following tangible metrics.

Thus, the project will be a success if/when:

- A webpage with clear guideline to search for products or select the products from a drop down menu, and it will return the accurate corresponding attributes and information; The design should be implemented with Autodesk's theme, and the website should be easy to use; Consider areas for scalability or further development once finished with the first draft.
- A Figma design for the webpage prior to creating the website by considering what is best for the user experience and business objective; The website should be visually appealing and shows some creativity.

SECTION 5: SIGNATORIES

Each party accepts the terms of this SOW by signing this SOW (or another document that incorporates it by reference). Once signed it will represent the key working document between the parties to resolve any disagreements about deliverables. It is important that both parties set all priorities in the SOW so that all stakeholders are clear on the objectives and working order.

Any reproduction of this SOW made by reliable means (for example, electronic image, photocopy, or facsimile) is considered an original and all Services ordered under this SOW are subject to it.

Agreed to:	Agreed to:
AUTODESK	**ANQI CHEN**
_____	Angi Chen
Signature Date	Signature Sep. 25th, 2022 Date
Printed Name_____	Printed Name _____Anqi Chen_____
Role: Industry Partner Project Sponsor	

Appendix

APPENDIX: CHANGE REQUESTS

All change requests will be captured here and executed upon agreement by both parties. This section should only be used on an exceptional basis, as all priorities should be captured in the main SOW body.

Change Item	Date Requested	Summary of Change	Resulting Action
XYZ			
XYZ			

APPENDIX: INTELLECTUAL PROPERTY/ CONFIDENTIALITY/ NON-DISCLOSURE

The Desautels Faculty of Management at McGill University takes information confidentiality very seriously and entrusts its Student Consultants to adhere to the highest standards of sensitive information protection.

The intentions of these experiential projects are to deliver insights and outcomes of high value to the Industry Partner and for learning and practical experience to be gained by the Student Consultants for use in their learning for potentially seeking future employment or other vocational endeavours.

Intellectual Property Ownership & Usage

Concerning the IP generated during the Deliverables, it will resemble the following:

- Industry Partner owns full Consulting output IP, as well as any produced files and source files transferred to them throughout and at completion of the project term.
- Industry Partners can re-use Student Consultant-developed methodology and output without the need for consent from Desautels or Individual Student Consultant.
- Desautels and Student Consultants should own any developed methodology/know-how, and should be able to re-purpose in another Use Case (excluding any Industry Partner data) without the need for consent from the Industry Partner, as long as it does not include any proprietary data, or is contradictory to the signed NDA with the Industry Partners
    - Student Consultants should read their NDAs carefully before taking part in any such activities
    - If there are any doubts, Student Consultants should ask Professors/Program/Partners
- Desautels and Student Consultants should be able re-use anonymized version of Consulting output IP (after validation by Partner). Use for educational purposes & general marketing only.
- Desautels and Student Consultants should only use Partner Name/ Project Description as a referenceable upon attaining approval from the Industry Partner representative.
    - This includes (but not limited to) CVs, social media posts, presentations or any activity that expose details of our partnership in a non-general format
    - Prior to approval, Desautels Faculty/Program should be able to use anonymized version of Partner Industry and Project Description when discussing its experience in the field of Experiential Learning.
- During and after project duration, Desautels and Student Consultants should not intentionally engage in direct competition with their Industry Partner Client after gaining any proprietary information that was a direct result of the Analytics Consulting course engagement. (ie will likely go against the terms of the partner NDA)
- The Program makes no claims or promises about the type/industry/size of Industry Partner nor Use Cases, available for use during these courses, when they procure projects form the business community. Use Cases/ Partners are procured for educational purposes in line with the

teachings of the program and may be independent of vocational aspirations of Student Consultants.

Signing of Confidentiality Agreements

It is the primary responsibility of the Industry Partner to protect their information as necessary. Student Consultants are free to sign appropriate NDAs with Industry Partners as long as the tenets do not conflict with the IP Ownership & Usage points above. Partners should be aware that:

- Student Consultant signed NDAs are individual and do not represent the Program
- Student Consultant signed NDAs will not apply to Faculty Instructors/Advisors (will have to sign individually if required)
- Student Consultant signed NDAs will not apply to Professional Advisors (will have to sign individually if required)

If this is not satisfactory, Industry Partners may request that Faculty and/or Professional Advisors have restricted access to information (specifics required) or not participate in the project. These restrictions are not encouraged as it may limit the value of the outcomes for the Industry Partners.

APPENDIX: DATA SHARING

In order to treat confidential information with sensitivity and care, the infrastructure defined in the attached Data Handling Agreement (DHA) will govern the data/info housing/sharing/purging process:

Out of Scope:

The industry partner should not share any Personally Identifiable Information (PII) throughout the process. As the Program cannot guarantee the safeguarding of such information, it is the Partner's responsibility to ensure that all PII is removed or pre-cleansed before sending/sharing any documents

NB: If PII analysis is a critical part of the project objectives, there will be a formal PII Anonymization step that needs to be completed by either the Partner, Student Consultants or a joint team. In such a case, it is highly recommended that the Partner set up onsite infrastructure so that the work can be performed and kept on their servers.

APPENDIX: STAKEHOLDERS AND ROLES

This section provides general guidelines concerning roles and tasks. Each individual designated to this project will be assigned to one or more of these roles.

McGill Role	Key Activities
Student Project Management Lead	• Key Liaison with Partner • Administer all contacts/meetings • Responsible for all deliverables
Student Business Strategy Lead (+team)	• Develop Data Centric Business Strategy & Research
Student Technical Lead (+team)	• Develop Data Centric Technology Strategy & Research
Student Modeling Lead (+team)	• Develop Analytic Model central to solving business problem
Student UX/UI Lead (+team)	• Develop End User centric approaches/ reports for analytic consumption
Faculty Academic Professor/ Advisor/ Reviewer	• Advise on Data & Analytic Methods & Best Practices • Review Final Deliverables
Professional Advisor/ Reviewer (if applicable)	• Advise on Data & Analytic Methods & Best Practices • Review Final Deliverables
Industry Partner Relationship Liaison	• Formal channel for admin setup/ intake/ complaints/ feedback

Estimated Effort:

Resource	Estimated Hours of Service
Project Manager	8 hours
Business Strategist	3 hours
Data Modeler	0 hour
Solution Architect	27 hours
UX/UI Consultant	20 hours
Faculty Advisors	0 hour
Professional Advisors	2 hours

Industry Partner Role	Key Activities
Partner Project Management Lead (1)	• Key Liaison with Partner • Administer all contacts/meetings • Responsible for all deliverables
Partner Domain/Data Specialists (1+)	• Develop Data Centric Business Strategy & Research
Partner Technical Specialists (1+)	• Develop Data Centric Technology Strategy & Research

Faculty and Professional Advisors

The Purpose of Faculty and Professional Advisor role is to provide context and experience to the Student Consultant project teams to enhance the analysis and strengthen the deliverables. These advisors will work 'behind the scenes' to provide support where needed for the best project outcomes. Although the program cannot guarantee any specific Advisor be assigned to each project, it will make best efforts to have consistent participation of advisors throughout the project as well as align those members with appropriate skills and experience. Upon Partner request, the program will disclose participating Faculty Departments and Professional Firms, but not individuals.

If this is not satisfactory, Industry Partners may request that Faculty and/or Professional Advisors have restricted access to information (specifics required) or not participate in the project. These options are highly discouraged.

APPENDIX: GENERAL STUDENT CONSULTANT TEAM COMPOSITION & RESPONSIBILITIES

The Program will staff Industry Partner projects with Student Consultants concentrating in Data & Analytics. The Program makes no commitment to have any one individual available for the duration of the project and or after project completion for consultation.

- If specific skill sets/backgrounds are needed for any specific project, Industry Partners should detail as much as possible so we can accommodate as best as feasible

The Program does commit to the following:

- Make best efforts to ensure that there are 3 minimum project team members (Including: 1 central Project Lead/ Liaison)
- Make best efforts to ensure that there is a mix of complementary and relevant skill sets to perform the required tasks
    - Individuals will be selected based on: Skill Set/ Industry Background/ Availability/ Career Aspirations and other factors to ensure the best balance available
    - This selection will be at the discretion of the Faculty and Professional Advisors
- Make best efforts to ensure that there is a bench of Students and Faculty to aid in solution development (on a need basis)
- Minimum of 1 Faculty Reviewer
- Option of 1 External Professional Reviewer (Partner can waive this upon request)
- Formal channel to deal with complaints/feedback

The Program and Student Consultants will perform the following:

- Remain committed to the agreed outcomes, and complete Deliverables in a timely manner and of professional quality
- Conduct periodic status updates
    - Highlight to the client any 'blackout periods' during the project's timeline
- Highlight early if any roadblocks exist regarding delivering proposed outputs
    - To escalate in a timely fashion
- Strictly adhere to partner confidential information and procedures
- Conduct all work with Industry Partners in a professional manner
- Conduct a presentation of final outcomes – for both Industry Partners and Professors
- Organize and deliver a final solution package – for both Industry Partners and Professors

APPENDIX: ONSITE WORK

McGill, Desautels and the Program also take the personal safety of each of their students and staff very seriously. No students/clients should face any degree of abuse (physical, verbal, mental) from either the Industry Partner clients or other fellow students/staff/coaches. If any such incidences occur, students/clients should raise the issues with their professors/ program administrators as soon as possible.

During the course of the projects, it is encouraged that Student Consultants work closely alongside the Industry Partners so to learn as much as possible/ realistically feasible for both parties.

Industry Partner clients should understand that the majority of the project work will be done remotely, but at time-to-time, Student Consultants may be asked/invited to work directly at the Partner's facilities. When 'on-site' at Partner offices, Student Consultants should adhere to the following:

- Follow on-site protocol as designated by the Partner PM, including office security and other instructions
- Conduct on-site business in a professional manner, including dress, behaviour and timing
- Student Consultants should not endure any costs associated with on-site work. Students should raise this issue if it occurs.

NB: In the off-chance that on-site work is required due to data privacy issues, a formal schedule should be pre-determined to ensure that the proper time/effort is given. In this circumstance, the Industry Partner must provide all infrastructure to conduct the work. Student Consultants should consult with the Program and/or Professor(s) if any guidance/support is needed.

APPENDIX: INDUSTRY PARTNER TEAM COMPOSITION & RESPONSIBILITIES

In order to make the project a success, a true partnership needs to be formed between all parties. The Program expects that our Industry partners will be equally committed to the outcomes, and treat this engagement as any of their other professional partnerships.

The Program expects the following:

- Ensuring that there is 1 main project coordinator (can substitute if necessary)
    - Provide responses, feedback and requisite data in a timely manner
    - Help define an escalation/absence process to ensure there are limited bottlenecks
- Ensuring that there is minimum 1 Subject Matter Expert (Business) available for multiple consults
- Ensuring that there is minimum 1 Subject Matter Expert (Technical) available for multiple consults
- Ensuring management support, buy-in and interest in Final Deliverables, and desire to advance the initiative if success criteria is met
- Indirect mentorship for students to grow into the field of Data & Analytics and or in the Industry of the project
- Be a referenceable partner for the Program if group objectives set out in this Statement of Work are met
- Provide student references if the role objectives set out in this Statement of Work are met