**STATEMENT OF WORK**

**Development, Optimization, Lead Gen Project**

**Prepared for:**

Asteri Partners

**Prepared by:**

Intelegencia

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# 1. Introduction

## Intelegencia

Since its inception, Intelegencia has been partnering with its global clients, some of which are Fortune 1000 companies, that leverage and rely on our broad portfolio of Digital Transformation, Software Architecture/R&D, Customer Care/BPO, E-commerce, Software services, Quality Assurance, Analytics/ML and Cloud Engineering offerings. Led by a strong leadership group, the globally acclaimed service firm today supports over 100 clients across North America, the Middle East, Europe, and APAC, with offices in the U.S., Europe, India, and the Philippines. Supported by outstanding talent, Intelegencia blends technical and functional expertise with comprehensive cross-vertical and cross-domain knowledge to help achieve business objectives. Its consistent successes have led to global recognition from Deloitte twice, first as one of India’s Fast 50 Technology companies and secondly as one of Asia’s Fast 500 Technology companies. Intelegencia is an official Microsoft Gold Certified partner, as well as a Salesforce Partner. Intelegencia’s clientele is primarily international, mainly based in the US and UK. Website: https://intelegencia.com

## Asteri Partners

Asteri Partners is a growth and value creation consulting firm specializing in assisting technology and manufacturing companies to enhance revenue, profit, and free cash flow. Established in 2020 and headquartered in Vancouver, Canada, the firm offers a range of services, including growth strategy, go-to-market planning, pricing optimization, revenue operations, procurement, cost reduction, automation, target scanning, due diligence, and program management. Asteri Partners also supports private equity and private credit investors in deploying capital within these sectors. The firm is recognized for its deep industry expertise, fast delivery, actionable recommendations, and a collaborative approach that ensures client teams are active participants throughout the consulting process. Website: Asteri.com

# 2. Definitions and Acronyms

## Definitions and Acronyms

The acronyms that may be encountered in this document are listed in the table below:

|  |  |
| --- | --- |
| **Acronym** | **Explanation** |

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# 3. Objective

## Objective Section

### PRIMARY OBJECTIVE:

To enhance Asteri Partners' online presence and lead generation capabilities through a comprehensive digital transformation strategy. This project aims to achieve a high-performing, secure WordPress website complemented by robust maintenance and security management. The focus will be on establishing Digital Data Maturity utilizing GA4, GTM, and Microsoft Clarity, which will allow for precise tracking and performance insights.

In addition, the strategy will incorporate Pay-Per-Click (PPC) advertising on Google and Bing, LinkedIn Ads, and Search Engine Optimization (SEO) to increase visibility, drive targeted traffic, and improve conversion rates. The ultimate goal is to create a sustainable digital growth framework that emphasizes continuous monitoring, data-driven decision-making, and ongoing optimization.

### SECONDARY OBJECTIVES:

* **Increase Website Traffic**: Achieve a 30% increase in organic and paid traffic to the Asteri Partners website within the first six months through targeted PPC campaigns and SEO optimization.
* **Lead Generation**: Generate a minimum of 100 qualified leads per month through the optimized website and digital marketing strategies, with an aim to convert 10% of these leads into clients within the first year.
* **Data Maturity Assessment**: Attain a Digital Data Maturity score of at least 4 out of 5 within the first year, as evaluated through analytics tools, ensuring actionable insights for ongoing strategy refinement.

### TARGET MARKET:

* **Geographic Focus**: United States
* **Industry Specifics**: Targeting technology and manufacturing sectors, particularly companies seeking consulting services for growth strategy, revenue optimization, and operational efficiency. The project will focus on enhancing the digital footprint of Asteri Partners within these competitive markets, capitalizing on their consulting expertise to attract potential clients.

By aligning these objectives with Asteri Partners' business goals, Intelegencia aims to create a robust digital strategy that supports sustained growth and establishes Asteri Partners as a leader in their field.

# 4. Scope

## Statement of Work (SOW)

### PROJECT SCOPE OVERVIEW:

This engagement covers a comprehensive digital transformation initiative for Asteri Partners, focusing on enhancing their online presence through structured web development, ongoing maintenance, and robust security management. The project aims to achieve Digital Data Maturity by implementing Google Analytics 4 (GA4), Google Tag Manager (GTM), and Microsoft Clarity, which will enable precise tracking and insightful performance metrics.

In addition, the project encompasses targeted Pay-Per-Click (PPC) advertising through Google and Bing Search, LinkedIn Ads, and Search Engine Optimization (SEO) strategies to enhance visibility, drive targeted traffic, and improve conversion rates. The overarching strategy emphasizes continuous monitoring, data-driven decision-making, and optimization for sustained digital growth.

### INCLUDED SERVICES:

#### 1. Web Development & Maintenance

* **Deliverables:**
* Design and development of a responsive WordPress website tailored to Asteri Partners’ branding and service offerings.
* Implementation of best practices for site structure, navigation, and user experience (UX).
* Regular website maintenance, including updates, backups, and performance optimization.
* Security management, including SSL certification and malware protection.

#### 2. Digital Data Maturity

* **Deliverables:**
* Integration of GA4 for enhanced tracking and reporting capabilities.
* Configuration of GTM for streamlined tag management and data collection.
* Implementation of Microsoft Clarity for user behavior insights and session recording.
* Regular data analysis reports to assess performance and identify improvement areas.

#### 3. PPC Advertising

* **Deliverables:**
* Setup and management of PPC campaigns on Google Ads and Bing Ads.
* Development of targeted ad copy and creative assets.
* Ongoing keyword research and bid management strategies.
* Performance monitoring and optimization with monthly reporting.

#### 4. LinkedIn Ads Management

* **Deliverables:**
* Creation and management of LinkedIn advertising campaigns targeting relevant demographics.
* Development of ad creatives and messaging aimed at generating leads.
* Regular performance analysis and adjustments to maximize ROI.

#### 5. SEO Optimization

* **Deliverables:**
* Comprehensive SEO audit of the existing website.
* Keyword research and implementation of on-page SEO strategies.
* Content creation and optimization, focusing on high-value keywords.
* Backlink strategy development and execution to enhance domain authority.

### GEOGRAPHIC/MARKET SCOPE:

* **Target Market:** United States
* **Market-Specific Considerations:**
* Focus on technology and manufacturing sectors, aligning with Asteri Partners' client base.
* Competitive analysis to identify key players and market trends in the U.S. landscape.

### PHASES OR TIMELINE:

#### Phase 1: Project Initiation & Planning (Month 1)

* Kick-off meeting to align project objectives and timelines.
* Detailed project planning and scope validation.

#### Phase 2: Web Development & Setup (Months 2-3)

* Development of the WordPress site.
* Implementation of GA4, GTM, and Microsoft Clarity.

#### Phase 3: Campaign Launch & Optimization (Months 4-6)

* Launch of PPC and LinkedIn ad campaigns.
* Initial SEO audit and implementation of strategies.

#### Phase 4: Ongoing Monitoring & Reporting (Months 7-12)

* Continuous optimization of web performance, PPC, and SEO efforts.
* Monthly reporting and strategy refinement based on data insights.

#### High-Level Timeline Expectations:

* Total project duration: 12 months.
* Key milestones will be established at the beginning of each phase to ensure accountability and progress tracking.

This Statement of Work outlines a structured and actionable approach to digital transformation for Asteri Partners, ensuring a high-performing and secure online presence that drives growth and value creation.

# 5. Solution Framework

## Solution Framework

This Solution Framework outlines our comprehensive approach to enhancing Asteri Partners' digital presence through a structured methodology, implementation areas, process workflow, and the use of advanced tools and technologies. Our aim is to ensure a high-performing and secure online presence while enabling data-driven decision-making for sustained growth.

### METHODOLOGY OVERVIEW

#### High-Level Approach

Our approach combines industry best practices with innovative digital solutions to create a holistic strategy that encompasses web development, maintenance, security management, and digital marketing.

#### Key Principles

* **User-Centric Design**: Prioritizing user experience to enhance engagement and conversion rates.
* **Data-Driven Insights**: Leveraging analytics tools to inform strategy and optimize performance.
* **Agility and Flexibility**: Adapting quickly to market changes and client needs.
* **Collaboration**: Working closely with Asteri Partners to ensure alignment and shared objectives.

### IMPLEMENTATION APPROACH

#### 1. Web Development in WordPress

* **Specific Methods**:
* Utilize the latest WordPress themes and plugins for optimal performance and aesthetics.
* Implement responsive design principles to ensure compatibility across devices.
* **Integration**: Seamless integration with analytics tools (GA4, GTM) for real-time tracking.

#### 2. Maintenance and Security Management

* **Specific Techniques**:
* Schedule regular updates and backups to maintain website integrity.
* Implement security protocols including SSL certificates, firewalls, and malware scanning.
* **Collaboration**: Work with Asteri's IT team to ensure compliance with internal security policies.

#### 3. Digital Data Maturity

* **Tools Used**: Google Analytics 4 (GA4), Google Tag Manager (GTM), Microsoft Clarity.
* **Approach**:
* Set up event tracking and goal conversions to measure user interactions.
* Utilize Microsoft Clarity for heatmaps and session recordings to gain insights into user behavior.

#### 4. Digital Marketing Strategy

* **PPC Management**:
* Launch Google Ads and Bing Ads campaigns focusing on targeted keywords.
* Regularly optimize campaigns based on performance metrics (CTR, CPC).
* **LinkedIn Ads**:
* Create targeted campaigns to reach decision-makers in technology and manufacturing sectors.
* **SEO Optimization**:
* Conduct keyword research and on-page SEO improvements to enhance organic visibility.

#### 5. Continuous Monitoring and Optimization

* **Methods**:
* Implement a dashboard for real-time performance tracking.
* Conduct monthly review meetings to assess progress and adjust strategies accordingly.

### PROCESS WORKFLOW

#### Step-by-Step Process

* **Kickoff Meeting**: Align on project goals and deliverables with Asteri Partners.
* **Discovery Phase**: Conduct audits of existing web assets and digital marketing efforts.
* **Development Phase**: Execute web development, focusing on design and functionality.
* **Implementation of Tools**: Set up GA4, GTM, and Microsoft Clarity for data tracking.
* **Marketing Launch**: Initiate PPC and LinkedIn campaigns while optimizing SEO.
* **Monitoring and Reporting**: Provide monthly reports and insights based on data analytics.

#### Dependencies and Sequencing

* Web development must be completed before analytics tools are fully integrated.
* Digital marketing campaigns should commence only after the website is live and functional.

#### Quality Assurance Steps

* Conduct thorough testing of the website across different browsers and devices.
* Validate analytics tracking to ensure accurate data collection.

### TOOLS AND TECHNOLOGIES

#### Key Platforms and Tools

* **Web Development**: WordPress, Elementor, WooCommerce (if applicable).
* **Analytics**: Google Analytics 4, Google Tag Manager, Microsoft Clarity.
* **Digital Marketing**: Google Ads, Bing Ads, LinkedIn Ads, SEMrush for SEO.

#### Integration Points and Data Flow

* **Data Flow**:
* Website traffic data flows from WordPress to GA4 via GTM.
* PPC campaign performance data is tracked and reported back to the marketing team for adjustments.
* **Integration Points**:
* Linking GA4 with Google Ads for enhanced campaign insights.
* Integrating Microsoft Clarity for user behavior analysis alongside traditional analytics.

By implementing this comprehensive Solution Framework, Intelegencia aims to empower Asteri Partners with a robust digital presence that fosters growth, enhances visibility, and drives targeted traffic, ultimately leading to improved conversions and sustained digital success.

# 6. Deliverables

## Statement of Work (SOW)

### Deliverables Section

This section outlines the key deliverables and responsibilities for both parties, ensuring a structured execution path aligned with Asteri Partners' objectives for the Development, Optimization, and Lead Generation Project.

#### MAIN DELIVERABLES

|  |  |  |  |
| --- | --- | --- | --- |
| **S.No.** | **Task Category** | **Key Deliverables** | **Responsibility** |

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# 7. Client Responsibilities

## Statement of Work (SOW) for Asteri Partners

### Client Responsibilities

To ensure seamless execution of the Development, Optimization, Lead Generation Project, Asteri Partners agrees to the following responsibilities:

#### KEY RESPONSIBILITIES

* **Designate a Single Point of Contact (SPOC)**: A designated representative will be responsible for all project-related decisions and approvals, ensuring clear communication between Asteri Partners and Intelegencia.
* **Provide Timely Access to Necessary Systems/Platforms**: Grant Intelegencia access to relevant platforms including WordPress, Google Analytics 4 (GA4), Google Tag Manager (GTM), and Microsoft Clarity to facilitate effective monitoring and optimization.
* **Share Required Assets, Guidelines, and Approvals**: Provide all necessary brand guidelines, digital assets, and any other resources required for the completion of the project.
* **Meet Agreed Timelines for Feedback and Decisions**: Ensure that feedback and decisions are provided within the agreed-upon timeframes to avoid project delays.

#### SPECIFIC REQUIREMENTS

To support the structured approach for web development, maintenance, and security management, Asteri Partners will adhere to the following specific responsibilities:

* **Access to Existing Digital Infrastructure**:
* Provide Intelegencia with administrative access to the existing WordPress site and any associated plugins to facilitate maintenance and updates.
* **Data Sharing for Digital Maturity**:
* Share historical data from GA4 and GTM, including existing tracking setups, to enable the establishment of precise metrics and performance insights.
* **Collaboration on PPC and SEO Strategies**:
* Provide access to current PPC accounts (Google Ads and Bing Ads) and any existing SEO reports to inform optimization strategies.
* **Approval of Creative Assets**:
* Review and approve all digital marketing creatives (ads, landing pages, etc.) within a 48-hour timeframe to ensure timely campaign launches.
* **Feedback on Reporting and Analytics**:
* Participate in bi-weekly performance review meetings and provide feedback on reports generated by Intelegencia to facilitate continuous improvement.
* **Resource Allocation for Campaigns**:
* Allocate necessary budget for PPC, LinkedIn Ads, and other marketing initiatives as outlined in the project plan, ensuring timely funding for campaigns.
* **Internal Stakeholder Engagement**:
* Facilitate engagement with internal stakeholders to gather insights and approvals necessary for project execution, ensuring alignment with Asteri Partners' strategic objectives.

#### TIMELINE EXPECTATIONS FOR CLIENT DELIVERABLES

|  |  |
| --- | --- |
| **Deliverable** | **Due Date** |

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# 8. Limitations

## Statement of Work (SOW) Limitations Section

To maintain project clarity and manage expectations for Asteri Partners regarding the "Development, Optimization, Lead Gen Project," the following limitations are outlined:

### OUT OF SCOPE

The following items are explicitly excluded from this project:

* **Third-Party Platform Integrations**: Any integrations with platforms such as Shopify, Magento, or other e-commerce solutions that are not WordPress-based.
* **Custom Software Development**: Development of bespoke software or applications outside the scope of WordPress maintenance and optimization.
* **Content Creation**: Writing or producing original content (e.g., blog posts, articles, or video scripts) is not included. This includes any graphic design work beyond basic image optimization for web use.
* **Social Media Management**: Ongoing management of social media accounts or campaigns is not covered within this project scope.
* **Advanced Analytics Setup**: Implementation of advanced data analytics solutions beyond GA4, GTM, and Microsoft Clarity, such as custom dashboards or reporting tools.
* **Training and Support**: End-user training sessions or ongoing technical support beyond the initial project delivery phase are not included.
* **Future Phases**: Any additional features or enhancements identified during the project but not explicitly included in this SOW will require a separate agreement and budget allocation.

### CONSTRAINTS AND DEPENDENCIES

The following constraints and dependencies may impact the project:

* **Performance Limitations**: The effectiveness of the implemented strategies will depend on external factors such as search engine algorithms, market conditions, and user engagement levels. While proven methods will be employed, specific performance outcomes cannot be guaranteed.
* **Platform Constraints**: The project is limited to the capabilities and features of the WordPress platform. Any limitations inherent to WordPress plugins or themes may affect the overall project execution.
* **Regulatory Limitations**: Compliance with data protection regulations (e.g., GDPR, CCPA) is the responsibility of Asteri Partners. Any required changes to the project scope to ensure compliance will be considered out of scope unless addressed in this SOW.

### REVISION LIMITS

To ensure project efficiency and manage expectations regarding changes, the following revision limits apply:

* **Revision Cycles**: The project includes a maximum of **two (2) revision cycles** for each deliverable. Revisions beyond this limit will incur additional charges.
* **Change Request Procedures**: Any requests for changes or additional work outside the agreed-upon scope must be submitted in writing. These requests will be evaluated, and a separate estimate will be provided for approval before implementation.

By clearly defining these limitations, we aim to foster a collaborative and productive working relationship, ensuring that both Asteri Partners and Intelegencia are aligned on project expectations and deliverables.

# 9. General Operations

## General Operations Section

### Governance Model for Operation

This Statement of Work (SOW) shall be governed by the Non-Disclosure Agreement (NDA) dated [Insert NDA Date] and the Master Service Agreement (MSA) dated [Insert MSA Date] executed between Asteri Partners and Intelegencia. The governing agreements outline the terms and conditions, including but not limited to:

* **Termination Clauses**
* **Non-Solicitation**
* **Non-Poaching**
* **Force Majeure**
* **Confidentiality Obligations**

#### Operational Framework and Reporting Structure

* **Project Oversight**: A dedicated project manager from Intelegencia will oversee the execution of this SOW, ensuring alignment with Asteri Partners' objectives.
* **Reporting Structure**: Regular updates will be provided through bi-weekly status meetings and weekly email reports. Key performance indicators (KPIs) will be established to measure progress and success.

# 10. Commercial Proposal

## Commercial Proposal

This engagement is structured as a 12-month partnership with a phased billing model to support the Development, Optimization, and Lead Generation Project for Asteri Partners. All commercials are billed in USD.

### Pricing Structure

|  |  |  |  |
| --- | --- | --- | --- |
| **Phase** | **Scope Covered** | **Monthly Fee** | **One-Time Setup Fee** |

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# 11. Termination

## Statement of Work (SOW)

### Termination Section

#### TERMINATION PROCEDURES

Either party may terminate this Statement of Work (SOW) by providing thirty (30) days' advance written notice to the other party. The termination process shall adhere to the following requirements:

* **Notice Period**: A minimum of thirty (30) days written notice is required for termination.
* **Termination Process**:
* The terminating party shall send a written notice of termination to the other party via email and certified mail.
* The notice must include the effective date of termination and a brief explanation of the reason for termination, if applicable.
* **Rights of Both Parties**:
* Upon receipt of the termination notice, both parties shall cease all work related to this SOW and take necessary steps to wind down operations.
* Both parties retain the right to seek damages or other remedies as permitted by law, in the event of a breach of this SOW.

#### POST-TERMINATION OBLIGATIONS

Upon termination of this SOW, both parties agree to the following obligations:

* **Payment for Completed Work**:
* Asteri Partners shall pay Intelegencia for all completed work up to the effective date of termination, including any pre-approved documented expenses incurred.
* **Asset and Data Return Procedures**:
* Intelegencia shall return all Asteri Partners' assets, including but not limited to documents, files, and any proprietary data, within fifteen (15) days of termination.
* Asteri Partners shall also return any materials belonging to Intelegencia within the same timeframe.
* **Ongoing Obligations or Restrictions**:
* Both parties shall continue to adhere to any confidentiality agreements and non-disclosure obligations as outlined in this SOW, even after termination.

#### FINAL DELIVERABLES

Upon termination of this SOW, the following final deliverables shall be provided:

* **Work Product Delivery**:
* Intelegencia shall deliver any completed work products, including reports, documentation, and other deliverables, to Asteri Partners within fifteen (15) days of the termination date.
* **Final Billing and Payment Procedures**:
* Intelegencia shall submit a final invoice detailing all work completed, hours worked, and any outstanding expenses within ten (10) days of termination.
* Asteri Partners agrees to process the final payment within thirty (30) days of receipt of the final invoice.
* **Knowledge Transfer Requirements**:
* Intelegencia shall provide a knowledge transfer session to Asteri Partners, detailing ongoing processes, tools, and any relevant information necessary for the continuation of services post-termination.

#### SIGNATURE SECTION

This Statement of Work is executed by the authorized representatives of the parties as follows:

**INTELEGENCIA** By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**ASTERI PARTNERS** By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_