# STATEMENT OF WORK

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## EXECUTIVE SUMMARY

Client enterprise users are being exposed to new user interfaces on a daily basis through consumer products such as smartphones, tablets, and modern operating systems such as Apple laptops.

Client continues to develop new releases of flagship product offering new features such as richer analytics and financial filtering tools; however, more importantly, the resulting releases will be redesigned from the ground up with a new security model, open standards based backend integration, a modern interface, and support for operating systems other than Windows — namely OSX & Linux. The new architecture will also provide a consistent look & feel and seamless branding with future Client iOS / Android mobile applications.

Client assessment is that sprints for the current release consistently fail to meet expectations. Project management suggests the situation is out of their control. Engineering continually asks for less scope in sprints and more time.

# GENERAL DESCRIPTION

This Statement of Work (SOW) details the planned strategic evaluation of Client IT organization to offer recommendations for releases within acceptable scope and timeframes.

A Subject-Matter Expert (SME) consulting resource highly skilled in IT strategy, architecture, and engineering practices is contracted to perform a 2-week assessment of management, CDM, and engineering practices resulting in presentation to Chief Technical Officer and associated team.

SME will communicate professionally and document project appropriately to be used by leadership as a basis for next-generation Client products.

# ENVIRONMENT

The Client environment is detailed as follows:

- Oracle Linux 7
- IBM Power Systems
- Redhat Enterprise
- Apache Hadoop

- Apache Tomcat

- Joomla

- Oracle 11g

- Electron 1.0

- Ionic Framework 1.3

- AngularJS 1.5

- Node.js 4.5

- Highcharts 4.2

- Stanford CoreNLP Analytics Tookit

- jQuery Core 1.12

- Font Awesome 4.6

- Java, JavaEE, PHP

- JavaScript 1.5, HTML5, CSS3

- Github.com

- Google Fonts

# OBJECTIVE

The object of this project is to create a high-quality working initial release of a next-generation Client product called Financial Analytics SD.

# KEY PERSONNEL

| Contracted Lead Architect | Client |
|---|---|
| Robert Ross Peterson | MP, CTO |
| info@avnielconsulting.com | mp@Client.com |
| (413) 695-5553 | (xxx) xxx-xxxx |

M.P. is the primary point of contact for this project from Client. Robert is the primary and sole contact from Avniel Consulting.

## SCOPE OF WORK

| DELIVERABLE | DAYS | ESTIMATE |
|---|---|---|
| | | |
| KNOWLEDGE GATHERING | 4 | |
| S1. All hands style meeting | 0.5 | Monday, February 1 |
| S2. 1-on-1's with department heads | 1.5 | Tuesday, February 2 |
| S3. 1-on-1's with core technical staff | 1.5 | Thursday, February 4 |
| S4. Document & disclose initial recommendations | 0.5 | Thursday, February 4 |
| | | |
| ALIGNMENT TO BUSINESS | 1.5 | |
| S5. Assess IT alignment with business strategy & mission | 1 | Friday, February 5 |
| S6. Document root causes of discrepancies & recommend changes | 0.5 | Monday, February 8 |
| | | |
| MARKET STRATEGY | 1 | |
| S7. Compare product architecture & features to market | 0.5 | Monday, February 8 |
| S8. Document discrepancies & recommend changes | 0.5 | Tuesday, February 9 |
| | | |
| ORGANIZATIONAL TRANSFORMATION | 1 | |
| S8. Organizational and productivity assessment: Are the right people sitting in the right seats? | 0.5 | Tuesday. February 9 |
| S9. Document organizational inhibitors & recommendations | 0.5 | Wednesday, February 10 |
| | | |
| IT PROCESSES | 1.5 | |
| S10. Assessment of agile IT processes and performance indicators | 1 | Thursday, February 11 |
| S11. Document process improvement recommendations | 0.5 | Thursday, February 11 |
| | | |
| S12. Final presentation to management | 1 | Friday, February 12 |

| | | |
|---|---|---|
| TOTAL | 10 | 2 weeks |

# COMMUNICATION

The intent of this communication agreement is to put effective practices in place so Client knows the status of the project to their satisfaction at all times.

SME will respond to voicemails, text messages, and emails within four hours. Client will respond to voicemails, text messages, and emails from SME within twenty-four hours.

# PAYMENT SCHEDULE

Compensation is based on a 40 hour per week work schedule and a billing rate on a *sliding scale* from $95-$140 per hour. Client has elected to pay the rate of $120 per hour and to set a fixed price for the 2-week project. This excludes travel expenses which will be arranged and billed to Client before or on Friday, January 15.

| COMPENSATION ESTIMATE | TYPE (HOURLY / FIXED) |
|---|---|
| $9,600.00 | FIXED PRICE |

# ACCEPTANCE CRITERIA

The intended result of this project is a high-quality advisory management presentation and document for next-generation flagship Client product. The project will be complete when the deliverables described in SCOPE OF WORK are complete to Client's satisfaction.

# REWORK POLICY

The SME will rework items listed in the SCOPE OF WORK as desired by Client. Additional iterations may be needed for various reasons such as misconceptions or additional information requested.

Should a new deliverable arise, this document should be revised with updated SCOPE OF WORK and PAYMENT SCHEDULE sections. Either the Client or SME parties may request or initiate an update to this SOW document at any time.

# REFUND POLICY

Client may request a refund at any time. There is no obligation that a refund or partial refund will be provided; however, in good faith, SME will provide a refund or partial refund should an unforeseen circumstance occur such as inability to complete work due to disability.

Date: 1/5/2015

Robert Ross Peterson
info@avnielconsulting.com
(413) 695-5553

Signature:_____ Date:_____

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