

Technical Strategy

SOW Template

###### 

# Overview

The overview section provides a short paragraph or two summarizing who the client is and what they want to accomplish.

## Required Content

1. Who is Levvel working with
2. What is the client’s primary business function as it relates to the engagement
3. What is the specific problem the client is trying to solve

## Optional Content

1. Language should be included around any previous engagements that will be used as input to this engagement. For example, follow on implementation work after a workshop was completed.

## Sample

MegaCorp is seeking to improve the number of land assets they are capable of onboarding per year and optimize the maintenance of land assets during the post-onboarding lifecycle. Levvel shall work with MegaCorp to create a technical strategy that outlines how to efficiently and effectively decompose and modernize the Land Management solution with minimal operational impact.

# Approach

Describe the execution of the engagement. Deliverables must be explicitly enumerated. This section is highly variable per client. The sample below can used to understand the level of detail to include.

## Sample

Levvel will work with MegaCorp to gain an understanding of the existing processes and technologies associated with Land Management which will enable Levvel to create a technical strategy outlining how modern technological changes can be applied efficiently and effectively.

Levvel will approach the engagement by dividing the work into four phases

• Land Management Onboarding

• Land Management Post-Onboarding

• Crossover Analysis with Suntrac

• Deliverable Creation

Land Management Onboarding

The first phase will focus on understanding the processes associated with the onboarding of land assets. Levvel will work with Delta to identify areas where modern technology can be used to optimize existing processes and where necessary, change processes with modern technology to achieve efficiencies and business enablement.

Land Management Post-Onboarding

The second phase will focus on understanding the processes related to managing land assets after they have been on- boarded. Levvel will work with Delta to identify areas where modern technology can be used to optimize existing processes and where necessary, change processes with modern technology to achieve efficiencies and automation.

Crossover Analysis

The third phase will focus on identifying components within Suntrac that have crossover with Land Management processes. Crossover analysis findings will be prioritized by the core team and potential transformation solutions

evaluated along with feasibility. When identifying solutions, COTS products may be considered, resulting in a build vs buy evaluation where applicable.

Deliverable Creation

In the final phase, Levvel will use the outputs from the previous phases to create the high-fidelity roadmap. Ad-hoc meetings with Delta stakeholders will occur to validate final decisions as the roadmap is created. If Delta chooses, this phase may conclude with a presentation of the roadmap to project stakeholders including anyone else from the larger Delta team.

## Sample: Deliverables Table

|  |  |
| --- | --- |
| Deliverable | Description |
| Technical Strategy | A detailed technical plan how to modernize and improve Land Management including the identification of business drivers, priorities, future state architecture and other technology decision points. |
| On-site Executive Summary Presentation | Optional, on-site presentation to executives and other stakeholders detailing findings and the Technical Strategy |

# Schedule, Staffing & Cost

Outline each resource, their responsibility, weekly rate, estimated involvement and estimated total.

## Sample

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Resource | Responsibilities | Weekly Rate | Estimated  Involvement | Estimated  total |
| Engineer | Ruby on Rails engineer tasked with implementing the proof of concept | $1 | 4 Weeks | $4 |

# Risks

This section enumerates risks that could lead to the project not meeting the estimated timeline.

## Common Risks

* Technical difficulties with dependencies or products outside of the team’s control
* Lack of buy-in or availability from the product’s stakeholders
* Extended leave of a team member due to illness or injury
* Administrative delays
* Access to client’s system will be provided in a timely fashion. A delay longer than x (weeks|days) may negatively impact the timeline

## Sample

No project is risk free, and Levvel will work with Client to mitigate any identified risks. Levvel will immediately communicate any new risks or unexpected problems to Client in writing. Common risks include, but are not limited to:

* <enumerate risks>

# Change Control

Change control process outlined in the SOW to give a reasonable means to extend the engagement if needed. It’s recommended to use the Sample below without any modifications.

## Sample

Throughout any project, changes are required to deal with unanticipated incidents and/or new information provided by **<client>** that arise during the course of the project. Project change control will proceed as set forth in the MSA and in accordance with the following specific action steps:

1. Levvel representative will complete a Change Order form, describing the change to be evaluated.
2. Levvel will perform an impact assessment (cost, schedule, risk, etc.) and provide a recommendation for how to achieve client goal in the context of this project and available resources.
3. Client will decide whether or not to proceed with the change, based on the information provided by Levvel.

Change orders will not necessarily produce additional fees. The change control process is intended to add intentionality about changes.

# Fees & Payment

Dictates the payment terms for the engagement.

## Sample

Levvel will provide services in accordance with the rate schedule defined above on a time and materials basis. The cost structure defined above is a best effort estimate, actual weeks required for completion may vary. Labor will be billed monthly and due NET-30. If travel is necessary, travel expenses will be billed separately as incurred using a standard mileage rate, without markup.

The Total Costs that are defined are strictly a calculation based on the estimated level of effort required by the defined resources.