

Statement of Work (SOW) - WeTrack (Risk Module) One-Time Services

Project Summary

Provider will work with Customer to complete the following as a part of this project:

- WeTrack (Risk Module) Implementation and Onboarding

Assumptions

WeTrack Onboarding

The standard approach to onboarding is a “Configured Delivery” model, meaning that the Customer is responsible for providing all required master data for configuration timely as well as prompt testing feedback. Once the Build Phase begins, any further requirements will be deemed out of scope.

WeTrack (Risk Module)

If the Customer does not already have an existing Risk Management plan, then the database will be configured according to system defaults. If the Customer is unable to utilize the system defaults, additional fees may be incurred and project timelines may be impacted.

WeTrack Training

One (1) round of remote training is included. All instructor-led trainings will be recorded. Process documentation will be managed by the Customer with specific software processes outlined throughout the onboarding.

Limitations

WeTrack (Risk Module)

The Service will be configured with the features and capabilities of the current release of the Services.

Scope of Services

Kick Off

Provider responsibility

- Internal handover and preparation
- Up to one (1) ninety (90)-minute remote kick off meeting.

Customer responsibility

- Ensure key project resources and stakeholders can attend kick off meeting.
- Ensure project scope is accurate and fully aligns to all business requirements.
- Raise any risks, blackout periods for software release, resourcing plan.
- Provide an understanding of business processes, data, and requirements.
- Prior to kick off, provide existing risk management plan, risk and issues log/register or subset thereof that are expected to be used.

Build

Provider responsibility

- Build out Authorized Users, functions, departments, existing risk matrix and impact types.
- Add any custom tags required.
- Provide Customer with risk import template.
- One (1) import up to 100 risks and associated controls.

Customer responsibility

- Complete and return Provider risk import template promptly.
- Import or update additional risks and controls, if needed.

Training

Provider responsibility

- Up to three (3) sixty (60)-minute remote training sessions; sessions will be recorded.

Customer responsibility

- Ensure appropriate Authorized users are selected and attend all training sessions.
- All Authorized Users will be expected to complete the designed curriculum.

Testing

Provider responsibility

- Up to two (2) thirty (30)-minute remote review sessions.
- Provider will maintain an issue log to track status and progress of issues raised.

Customer responsibility

- Customer is responsible for preparing for, and executing user testing, including creation of test plans, test cases, and test scripts.
- Ensure key resources attend all testing review meetings.
- Promptly raise any issues found (that are within the scope of work).
- The testing phase will not exceed one (1) week in duration.

Launch & Post Launch

Provider responsibility

- Up to one (1) sixty (60)-minute final review of system, including user role permissions and reporting.
- Project closure & handover.
- Post Launch activities will not exceed one (1) week.

Customer responsibility

- Ensure key resources attend all post launch support review meetings.
- Complete customer satisfaction survey.
- Post Launch activities will not exceed one (1) week.

Project Management

Provider responsibility

- Creation and maintenance of project plan.
- Coordination of resources, activities, meetings in alignment with timelines and milestones.
- Review of project timelines, budgets, and risks to schedule.

Customer responsibility

- Nominate project lead
- Ensure key resources attend all weekly project review meetings to provide updates.
- Coordination of activity and resources on customer side to align to project plan and schedule.

Exclusions

- Custom development
- Integration Services with any third party or other Momentum Services

Project Schedule

The estimated timeline for this project is 8 weeks. However, Provider and Customer will create and agree to a joint project plan in writing (email acceptable). The plan is *an estimate* and subject to change upon mutual written agreement.