



**Dillon Enterprises**

**Fitting the Pieces Together**

# **STATEMENT OF WORK**

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**[Project #: Project Name]**

Date:  
Version:

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# Statement of Work

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## Executive Summary

{Enter high-level description and problem here. *M*}

## Project Scope

{Enter a description of the goal or condition that will be achieved through the project here. *M*}

## Business Objectives

{Enter numbered high-level objectives here. - *M*}

## Business Impact, Cost Estimate, and ROI

{Enter a description of the business value and impact anticipated for the project requested. Also identify anticipated total Investment (costs) incurred by project effort compared to the anticipated Return (may be quantitative or qualitative; increase of revenue or risk removal) here. - *M*}

## Assumptions

- Appropriate technical resources will be available to complete coding efforts.
- Appropriate number of SME and other staff will be available during the design and testing.
- Development and test environments will be available, having sufficient space to address all project aspects.
- There will be sufficient customer base available during the test phase of this project.

## Risks

{Enter a description of the circumstances, conditions, or events that have the potential to undermine the success of the project. Quantifiable or quantitative results should be identified as well as steps to mitigate risks should also be identified here. - *M*}

## Interrelated Projects

{Identify projects outside the scope of the specific project that may have interdependencies or other linkages here. *M*}

## Project Completion Criteria

{Enter a description of the specific conditions, performance, or metrics that must be achieved for the customer to consider the project complete and successful here. - *M*}

## Communication Approach

Bi-weekly status reports will be sent to Business Owners and Technical Team representatives. Weekly meetings with project Technical Teams will be held. Additional meetings will be held on an as needed basis.

## Change Management Process

In order to effectively manage changes to project requirements, deliverables, costs and schedules, we have instituted a change control process to be used during project development. The intent of the process is not to delay the process or deny the user's request, but to provide an appropriate change request review and approval process. Changes that are considered "project critical" are defined as: the new process CANNOT OPERATE without the change. Changes that are considered "project important" are defined as: the new process would run better with this change.

Each change request will be documented, along with the estimated time and impact on project delivery. If the change is "project critical" and impacts delivery dates and schedules, Sr. Management will be notified. If needed, a meeting will be held to determine if the change is "critical" enough to delay the project. If a "project important" change can be done and not impact the delivery date and schedules, the change(s) will be included in the project scope.

## Project Terminology

{Enter a glossary of unique or not generally understood terms here - *O*:}

Terms	Definition

## Project Approach

Phase	Deliverable
Initiate/Concept	Initial Statement of Work Initial Project Plan
Requirements	Business Requirements Document Final Statement of Work Updated Project Plan
Design	Functional Design Document Technical Design Document Updated Project Plan
Development/Construction	Test Plans User Acceptance Plan User Documentation
Implementation	Implementation Plan Acceptance Document Updated System Documentation Support/Operations Document
Closedown	Project Review Summary Customer Satisfaction Survey Lessons Learned Document

## Project Roles and Responsibilities

Functional Role	Organization/Responsibility
Project Manager	Enterprise Technology Solutions - various organizations — e.g., Siebel, Web Development, Oracle Financials. Additionally responsible for technical applications development.
Business Analyst	<ul style="list-style-type: none"> <li>• Performs business analysis for IT projects.</li> <li>• Develops and documents detailed business requirements and functional specifications for projects.</li> <li>• Partners with Quality Assurance groups to ensure that user acceptance documentation is produced and executed.</li> <li>• Partners with business in the development of effective policies and procedures to facilitate the smooth transition and effective use of new or enhanced systems (<i>Tax Service only</i>).</li> <li>• Provides for post-production support of implemented projects (<i>Tax Service only</i>).</li> </ul>
Technical Services Manager	Various Technology Platform Organizations — Data Architecture, Data Infrastructure, Technical Services/Support. Provide support for applications and project managers.
Production Support Manager	Various Application and Technology Platform Support Organizations – First Call, Data Architecture, Data Infrastructure, Technical Services/Support and any Application development organizations that provide support functions. Ultimately responsible for the application after its implementation.
Project Member/ Functional Lead/ Subject Matter Expert (SME)	Contributing matrixed member of project team with responsibility for tasks representative of their functional organization and technical skills. May include engineers, technicians, developers, technology architects, technology strategists, vendors, administrators, documentation specialists and clerical.
User/SME/Business Owner	Identify change required and complete the top portion of the change request document. Indicate whether the change is project "critical" or "important". If the change is important, rate the importance as high, medium or low. (List email address to be used.)
Quality Assurance	<ul style="list-style-type: none"> <li>• Participate in all requirements/functional meetings to gather and document test cases.</li> <li>• Responsible for the creation and execution of</li> </ul>

Functional Role	Organization/Responsibility
	test plan, test cases, automated test scripts (if applicable) and test data. <ul style="list-style-type: none"> <li>• Provides QA approval for all migrations to test and production environments.</li> <li>• Work with the business during UAT by assisting with test script execution, documentation and reporting of all issues.</li> <li>• Provides post-implementation support.</li> </ul>
Change Control PM	Log the change and pass to programming for estimates and possible impacts to schedule. Notify Users of status and decisions of changes and distribute change log to all project team members.
IS Project Team (Programming and PM)	If change can be incorporated without impacting deliverable dates, move forward with change. If change cannot be incorporated without changing deliverable dates and is rated as critical, schedule meeting with STEERING COMMITTEE for decision. If the business owner and the development manager sign off, move dates and continue. If they do not signoff then go to the STEERING COMMITTEE.

**Note:** The STEERING COMMITTEE Board will be the final authority on all change requests. If the need arises for a decision to be made on an enhancement, it will be presented to the STEERING COMMITTEE Board for a ruling.

## **Acknowledgement of Review**

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The following individuals have reviewed and approved these business requirements. Signatures were obtained digitally and have been stored on the LAN along with project documentation. Please contact project management for proof signature.

Name  
Title

Name  
Title