

SOFTURA BUSINESS INTELLIGENCE JUMPSTART

Jumpstart Fundamentals

Project Name:	Business Intelligence Power BI Jumpstart	Sales Contact:
Customer Name:	Click here to enter Customer name.	
Effective Date:	March 23, 2020	Seller: Virtual Systems Solutions (dba) "Softura":
Version:	1.0	

Customer-Designated Locations

Location(s)	Service(s)		
Customer Address	<input checked="" type="checkbox"/> Assessment <input type="checkbox"/> Configuration <input checked="" type="checkbox"/> Design <input type="checkbox"/> Implementation	<input checked="" type="checkbox"/> Knowledge Transfer <input type="checkbox"/> Project Management <input type="checkbox"/> Reconfiguration <input type="checkbox"/> Reinstallation	<input type="checkbox"/> Staff Augmentation <input type="checkbox"/> Support <input type="checkbox"/> Training <input type="checkbox"/> Custom Work

Jumpstart Scope

The Business Intelligence (BI) Jumpstart is a 10-day rapid development engagement designed to allow the customer to quickly tell a story with their data through visualizations generated in Power BI. Seller will work with the customer to identify key business drivers, data sources, and top metrics. We will work closely with the customer throughout this engagement to import data, model the data and create reports and dashboards showcasing the speed and ease of implementing a BI solution with Power BI. The overall goal is to provide the customer with modernized reporting and self-service analytics driving better business decisions.

Softura, the seller, will create a dashboard using data elements defined by the Customer. The dashboard will contain essential metrics you need to know to drive your decision making forward using Power BI. The Seller will utilize data that already exists in the Customers environment from a single source. This will allow the stakeholders to understand the impact and benefits of deploying a modern Business Intelligence solution.

Objectives of the Jumpstart are:

- Rapidly implement a Power BI solution to be used across devices; computer, tablet, mobile
- Understand the customer's BI vision and goals; current challenges and pain points
- Determine KPIs that drive business to use in data visualizations produced
- Understand customer's existing business and/or technical landscape
- Determine select data to be used throughout engagement
 - Solution to include 2 data sources, 1 fact table and up to 5 dimensions
- Development of reports and a dashboard
 - 3 reports and 1 dashboard
- Knowledge transfer to select business units

- Discuss next steps with stakeholders for future BI deployment

Jumpstart Approach

To accelerate your solution in Power BI seller will use an agile BI methodology while working closely with customer over the next two weeks to:

Week 1

- Discovery / Planning Sessions (3 Days)
This phase begins with understanding your organizations BI vision and goals. We will capture your BI business and technology requirements, develop a business case and discuss the readiness of the organization. A full BI readiness assessment will not be performed as part of the jumpstart.
 - Jumpstart kick-off meeting(s)
 - Define scope and plan to be implemented throughout engagement
 - Identify business use cases
 - Gather business requirements
 - What KPI's need to be defined?
 - Document the proposed solutions initial scope, vision and high-level components
 - Discuss and understand current state data and deliverables
 - Outline Expected Deliverables
 - Prepare any technical design documents, if necessary
 - Workshop to determine a candidate business area for data visualization and success criteria
 - Get to know your data
- Solution Design (1-2 Days)
During this phase, we focus on architecting the BI solution to ensure all of the necessary pieces are put into place. With an identified dataset, we will design a data model that will display what is possible with a BI visualization tool.
 - Review requirements and begin designing technical architecture
 - Data review and understanding
 - Perform detailed design for data modeling, ETL interface and BI reporting
 - Create reporting and dashboard prototypes (when necessary)

Week 2

- Build, Validate (4 Days)
In this phase we augment and customize your requirements gathered during week 1. In addition, we work closely with identified stakeholders to ensure unit testing is performed.
 - Data exploration
 - Visualization
 - 3 reports 1 dashboard (from focus area determined during week 1)
 - Report Scheduling
 - Mobile reporting
 - Testing and results comparison
- Deploy (1 Day)
This final phase hands-off the BI solution to the selected user community.
 - Knowledge transfer
 - Provide documentation
 - Feedback session with recommendations

- Determine next steps

Power BI Jumpstart Deliverables

- Build a proof of a concept Power BI solution
- Design interactive visualizations against customer's existing data
- Build up to 3 Reports and 1 Dashboard
 - Solution includes 2 data sources, 1 transaction table and up to 5 dimensions
- A Power BI desktop file published to PowerBI.com with scheduled data refresh if appropriate with pilot reports and dashboard(s)
- Mentor your team on Power BI solution development

Project Kick-Off

Kick-Off and Overview Meeting

Seller will begin with a brief project kick-off meeting with the core Customer project team. The kick-off meeting will be approximately two (2) hours in duration. The agenda topics to be covered will include the following:

- Customer and Seller team introductions
- Project overview and goals – vision statement
- Roles and responsibilities
- Schedules and timelines

Project Management

Seller and Customer will jointly manage throughout the engagement.

- **Kickoff Meeting.** Review SOW including project objectives and schedule, logistics, identify and confirm project participants and discuss project prerequisites.
- **Project Schedule or Plan.** A project schedule that details the schedule and resources assigned to the project.
- **Change Management.** When a change to a project occurs, the Seller's project change control process will be utilized.

Customer Responsibilities

1. Customer will provide relevant business and technical stakeholders and subject matter experts to participate in the project.
2. Customer will provide necessary access to Customer systems to complete activities
3. Customer will provide timely responses to requests for additional information
4. Customer will provide remote/physical access to the premises
5. Customer will provide network and application access with appropriate permissions
6. Customer will provide Internet access
7. Customer will provide access to stakeholders to answer questions or clarify the business context
8. Customer is responsible for providing the necessary hardware and software
9. Customer is responsible for any network configuration
10. Customer will make any required firewall rule changes to support the on-premises data gateway
11. Customer will provide necessary service accounts to connect to the required data sources in SQL Server and DB2

Project Assumptions

1. Customer has access to Power BI subscription or trial version to conduct Pilot
2. Azure Active Directory is healthy and configured correctly.
3. Seller will create up to 3 reports and 1 Dashboard using Power BI.
4. Customer has a service account to allow connectivity with on premises data where required.
5. Customer will provide assigned dedicated resources to ensure there is no break in service.
6. Direct connection to a single data source or load of 2-3 data sources supplied to seller in .csv or .xls formats
7. Non-production ready jumpstart will demonstrate key concepts of Power BI so customer is ready to take to next level
8. Any deviations to jumpstart will need to be estimated separately
9. Seller will work remote

Out of Scope

Specific tasks outside this SOW include, but are not limited to:

1. SQL Server Installation and Configuration
2. Streaming Analytics
3. Event Hubs
4. SQL Reporting Services
5. Hadoop Big Data
6. SSIS ETL
7. SSAS OLAP Cubes
8. Data Warehouse on premises or in Azure
9. Azure Active Directory Connect
10. Active Directory Federation Services (ADFS)
11. Security within Tool or dataset
12. Power BI Gateway configuration

Item(s) Provided to Customer

Table 1 – Item(s) Provided to Customer

Item	Description	Format
Jumpstart Summary	Documentation per the following: <ul style="list-style-type: none">• Requirements documents• Project Summary• Findings from proof of concept Statement of work for future phases identified during this engagement	Word Document / PDF
BI reports / Dashboards	Jumpstart POC deployed	Deployed code / customizations

Project Scheduling

Customer and Seller, who will jointly manage this project, will together develop timelines for an anticipated schedule (“**Anticipated Schedule**”) based on Seller’s project management methodology. Any dates, deadlines, timelines or schedules contained in the Anticipated Schedule, in this SOW or otherwise, are estimates only, and the Parties will not rely on them for purposes other than initial planning.

Professional Services Fees

The BI Jumpstart is a fixed fee engagement of \$16,000

Expenses

Seller will invoice Customer for Seller's reasonable, direct costs incurred in performance of the services. Seller and Customer will decide if travel is needed for this engagement. If travel is agreed upon, direct expenses include, but may not be limited to: airfare, lodging, luggage, mileage, meals, shipping, lift rentals, phot copies, tolls and parking. Seller will charge actual costs for these expenses. Any projected expenses set forth in this SOW are estimates only.

Two (2) weeks' advance notice from Customer is required for any necessary travel by Seller personnel.

Not For Signature

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