

Statement of Works: Genius Customer Success

Detailed information on what's included with your Genius Services

1. Background

The Client have selected edison365 as the technology solution to support the realization of their business requirements. The Client have also selected edison365 to provide management consulting support for the initial implementation of the edison365 software.

This Statement of Work details the deliverables, scope, and conditions associated with the execution of these services.

The execution of the services listed below is dependent upon the subscription purchased by the Client. Elements of software functionality are restricted to different subscription levels.

edison365 will only provide services that cover the subscription procured by the Client, and will not execute any works for the Client that pertain to functionality not available at the subscription level procured.

The execution of the services contained within the Statement of Work are bound by the conditions set out within the [Master Services Agreement](#).

2. In Scope

2.1 1-on-1 customer success clinics

edison365 will deliver up to six customer success clinics at one hour per meeting via Microsoft Teams over the duration of the contract. During these sessions, edison365 will agree and monitor key success criteria with the Client. It is incumbent upon the Client to define and, where necessary, measure performance against each of these key success criteria.

edison365 will provide guidance and support on how to reach and maintain high performance across the Client's key metrics. This consultative work will cover:

- Strategy
- Process
- People
- Skills
- Culture

2.2 1-on-1 product excellence clinics

edison365 will deliver up to six product excellence clinics at one hour per meeting via Microsoft Teams over the duration of the contract. During these sessions, edison365 will work with the Client to understand the evolution of requirements as maturity increases. It is incumbent upon the Client to define key requirements and pain points in order for edison365 to support in these areas.

edison365 will provide guidance and support on how to successfully meet these requirements, specifically within the bounds of the edison365 software platform. The product-led work is technology focused.

2.3 Detailed insight reports

edison365 will deliver up to two sessions at one hour per meeting via Microsoft Teams to train the core the Client team in the identification, interpretation and utilization of performance insights arising from end user interaction with the edison365 software.

edison365 will work with the Client to deploy a single .pbit file, containing a specialized Power BI report designed for edison365 software system administration or managers only. edison365 will demonstrate how to use this resource including:

- How to spot early warning signs pertaining to configuration, management and adoption
- How to interpret key visualizations to understand where the problems lie
- How to use this information to improve end user experience, optimize configuration, reduce waste, and increase end user adoption and engagement

It is incumbent upon the Client to ensure, prior to the session:

- There is a nominated person responsible for publishing and maintaining the report.
- This person is present to publish the report
- This person has access to the data sources queries within the Power BI report.
- This person has either;
 - Permission to create a new workspace within the Power BI online service, or;
 - Access to the target workspace where the report shall be published

2.4 e-Credits

The Client account will be credited with 150 "e-Credits" that may be used at any point in the duration of the contract to execute additional work per this list.

For more information on the services available through the e-Credits framework, head to our website. For more information on how to use e-Credits, check out this related Statement of Works.

2.5 Annual Success Plan

edison365 will work via Microsoft Teams with the Client to define the long term goals, objectives and ambitions of the Client organization / team.

edison365 will use this information to produce an Annual Success Plan. This plan will detail out key actions and tasks required in order to realize the goals and objectives set out by the Client. edison365 will have responsibility for some of that work, as will the Client.

Performance against this plan will be validated on an ongoing basis, and within the 1-on-1 customer success clinics.

The overarching Annual Success Plan will be provided natively, in-app, to assist the Client with the execution of the training plan.

Supporting material will be provided in multiple formats, including:

- .pptx
- .mp5
- .png
- .jpeg

2.6 Pulse Checks

edison365 will conduct regular, frequent checks with the Client via Microsoft Teams, up to twelve times at two hours per meeting. In these sessions, edison365 will look to understand current problems, issues, and opportunities faced by the Client.

edison365 will guide the Client to resolve any problems and issues, and also to maximise any opportunities. These frequent touch points also serve as an opportunity to validate progress against the Annual Success Plan.

2.7 Managed Service

edison365 will provide the Client with a full managed service, covering the administration of the edison365 software and the Power BI report(s) integrated with it.

Each request for managed service support must be submitted as a change request through the [Change Request Form](#). It is incumbent upon the Client to complete this form and provide

sufficient information for edison365 to act upon it. If there is insufficient information to proceed, edison365 will contact the Client to clarify their Change Request. edison365 will not execute any managed service support without prior submission of a Change Request by the Client.

The consultant in change of the work will provide an estimate of effort required to the Client before starting the work. It is the responsibility of the Client to prioritize effort and instructions based on the amount of time remaining within the fair use policy.

It is the responsibility of the Client to understand and evaluate the impact of the work instructions given to edison365. edison365 are not responsible for full system administration, change management, or for assurance.

This work is subject to a fair use policy, with a budget of up to **6 days per quarter**. If you require additional support with this, please speak to your account manager to explore pricing and availability. edison365 must be provided with a service account to access the Client tenant, instances, and data to provide a managed service. This covers both the product administration and reporting administration. It is incumbent upon the Client to provide access to edison365 prior to the works commencing. Access via a virtual machine or other systems or processes which result in an increase to the amount of time required to complete the works are outside of the scope of works.

2.7.1 Full product administration

edison365 will conduct a range of product-focused work based on the instruction from the Client. This work includes the creation, amendment, and deletion of the elements listed below.

- Fields
 - Text
 - Rich Text
 - Number
 - Image
 - Choice
 - Multi-level choice
 - Tags (multi select)
 - Multi-level Tags (multi select)
 - Date
 - Switch
 - People Picker
 - URL
 - Calculated
 - email
 - Phone
 - Location
- Tables
 - Standard
 - Periodic (Gregorian)
 - Periodic (Fiscal)
 - Calculated
- Triage Metrics
- Workflows
- Gantt Charts
- Board View
- My Work
- Forms

edison365 will also configure the design of the software. This includes:

- Logo
- Theme

- News Stories
- Forms
- Cards
- Views
- Homepage

2.7.2 Full reporting administration

edison365 will conduct a range of reporting-focused work based on the instruction from the Client. This work includes the use of Microsoft Power BI for the creation, amendment, and deletion of the elements listed below.

- API queries (exclusively to the edison365 software - other data sources are not included)
- Transformations (how the data is modelled)
- Calculations (additional expressions built into the report)
- Report visualisations (which charts / graphs are used to display the data)
- Report filters
- Report theme (branding, colours, logos)

It is incumbent upon the Client to provide edison365 with the latest version of the report which must be amended.

edison365 will provide the Client with a revised .pbix file once the work is complete.

It is the responsibility of the Client to publish the report.

edison365 will also provide basic guidance on the use of the Power BI report once it has been published to the Power BI online service. This includes;

- Navigation of the User Interface
- Interacting with visualizations
- Sharing the report
- Embedding the report within edison365
- Key insights from each report

It is incumbent upon the Client to ensure:

- There is a nominated person responsible for publishing and maintaining the report.
- This person has access to the data sources queries within the Power BI report.
- This person has either;
 - Permission to create a new workspace within the Power BI online service, or;
 - Access to the target workspace where the report shall be published

Reports will **always** be developed using the most recent version of Microsoft Power BI. Per the Power BI website; "[Only the most recent version of Power BI Desktop is supported](#)"

It is incumbent upon the Client to ensure they are using the most up to date software in order to use the reports created by edison365.

You can check the current version [here](#).

3 Out of Scope

The items listed below are specifically excluded from the scope of this engagement. Should the Client wish to include these in the defined scope following the initial agreement and commencements of the works, this will be raised as a formal Change Request (CR) via the Account Manager.

edison365 will manage each the Client change request, and where necessary propose additional costs arising from the variation.

Items marked with an asterisk (*) can be purchased with e-Credits

- Integration to other systems
- Custom software development of the edison365 platform
- The installation of additional instances
- Data migration from, or to, other systems

- Microsoft Power BI training*
- Publication and distribution of Microsoft Power BI reports
- Hosting of Microsoft Power BI reports
- Reporting developing using any tool other than Microsoft Power BI
- Connection to external (non-edison365) data sources for report development
- Strategic Innovation Management training*
- Project Planning training
- Project Management training
- End user software training*

3.1 Changes to Scope

Any changes to scope, deliverables or budget will be subject to a standard CR process. Each CR will be documented in a change log. The impact, risk, time and required cost of each CR will be estimated by edison365. This will be communicated to the Client via email.

Both edison365 and the Client must agree and accept the CR prior to the works commencing. Work on any CR will not begin until it is formally accepted in writing by the Client.