

Statement of Works: Professional Customer Success

Detailed information on what's included with your Professional Customer Success Services

1. Background

The Client have selected edison365 as the technology solution to meet core business requirements. This Statement of Work provides the effort and pricing to support the Client with ongoing management consulting support.

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 Incident break / fix support

This includes coverage by the dedicated edison365 support team of issues, bugs and incidents within the edison365 products. The support team will capture, investigate and fix arising issues.

2.2 Product Support & Guidance

edison365 will provide additional product support and guidance that goes beyond the scope of break / fix support. This includes recommendations and assistance with functionality, use cases and applications. edison365 will work with the Client to explore existing functionality, enabling the best possible application of the edison365 platform

2.3 Customer Success Calls

edison365 will deliver periodic calls every two months through the contract duration. This will be delivered by a dedicated customer success manager to review engagement, utilization and progress against the Client's success criteria

edison365 will combine technical expertise with expert consulting guidance to provide a route to the most effective use of the edison365 platform, enabling the Client to drive strong adoption and engagement and realize maximum value from investment.

2.4 Outsourced administration

edison365 will deliver ongoing edison365 product administration within the Client's tenant. The outsourced administration in this managed service covers:

- Creation, amendment, and deletion of fields
- Creation, amendment, and deletion of tables
- Creation, amendment, and deletion of forms
- Creation, amendment, and deletion of types
- Creation, amendment, and deletion of branding
- Creation, amendment, and deletion of user permissions

The edison365 team will leverage insights gained through our customer success calls, plus Client instruction, to manage the back-end administration of the edison365 platform.

This is timeboxed to **4.5 days per module**. If you require additional support with this, please speak to your account manager to explore pricing and availability.

2.5 Outsourced Report Writing

edison365 will deliver quarterly revisions to reports that correspond to your edison365 products. The outsourced report writing in this managed service covers:

- Creation and amendment of SQL queries
- Creation and amendment of Microsoft Power BI reports;
 - Data connections to the edison365 platform
 - Data transformations
 - Data modelling
 - Visualizations
 - Formatting / branding

edison365 will build on insights gained through both the customer success calls and outsourced administration to ensure the Client has a comprehensive product report that provides relevant, rapid and data-driven insights that inform the decision-making process.

This is timeboxed to **4 days per module**. If you require additional support with this, please speak to your account manager to explore pricing and availability.

3 Out of Scope

The items listed below are specifically excluded from the scope of this engagement. Should the Client wish to include these into the defined scope later, this will be managed through formal Change Requests and may require additional budget.

- Portfolio Analysis (Drivers, selection & prioritisation)
- Resource engagements
- Integration to other systems
- SharePoint Online workflows
- Custom development of the toolset
- Additional instances or installations
- Changes to SharePoint Online (outside of agreed deliverables)
- Data migration
- Any customization / development
- Customer specific documentation
- Microsoft Project training
- Project Planning & Project Management upskilling
- Project Lifecycle Workflow including Phases, Stages and Actions
- End user training
- Reporting developing using any tool other than Microsoft Power BI
- Connection to external (non-edison365) data sources for report development
- Publication / distribution of reports

3.1 Changes to Scope

Any changes to scope, deliverables or budget will be subject to a standard change request process and will be documented in a change log, estimated, impact assessed and agreed by both parties prior to commencement.