



# Statement of Work for Managed Process Automation at Hidalgo County, Texas

Prepared by Lanshore LLC  
October 1st, 2021



**Statement of Work No.: Hidalgo-2021-renewal**

EFFECTIVE: 12/01/2021

**1. Statement of Work**

- 1.1. **Introduction.** This Statement of Work (“SOW”) defines the services to be performed by Lanshore, LLC (“Supplier”) for Hidalgo County, Texas (“Client”) for implementation of robotic process automation technologies (“RPA”) and products licensed from UiPath, Inc. (the “Project”) under the Managed Services Agreement entered into between Supplier and Client on [DATE].
- 1.2. **Project Objectives.** This SOW defines the Project scope, implementation, RPA management, software use and licensing, fee structure, deliverables and timelines.
- 1.3. **Scope of Work.** To achieve the Project objectives, the following activities and deliverables will be included as part of the scope of work. The scope shall include Supplier providing managed robotic services for six (6) processes to be determined with Client consisting of no more than ten (10) stages per process. Additional processes can be added at any point and will be priced based on the fee schedule in section 4 of this SOW

Stage - Activity	Scope	Supplier Participation	Client Participation
	Communication Planning: meeting planning, status reporting, project kick-off meeting plan	Establish: <ol style="list-style-type: none"> <li>regular meeting schedule including definition of attendees for all planned project meetings.</li> <li>schedule for status reporting, verification of formats, and appropriate distribution lists.</li> </ol> Plan project kick-off meeting.	
	Project control mechanisms	Establish/confirm procedures for: <ol style="list-style-type: none"> <li>issue tracking and escalation</li> <li>risk identification and mitigation</li> </ol>	
	Project planning	<ol style="list-style-type: none"> <li>Confirm scope of work</li> <li>Refine estimates for scope of work</li> <li>Create/refine project with key delivery dates</li> </ol>	<ol style="list-style-type: none"> <li>Agree to project scope</li> <li>Provide subject matter experts to guide process</li> </ol>

	Refine Project Plan	Refine tasks, work effort estimates, staffing, timeline and dependencies based on confirmed availability of Client resources	
Implementation – Define	Identify and document Process Definitions	Identification, documentation	Identification
	Creation of Process Heat Map	Identification, documentation	Identification
	Refine Project Plan	Refine tasks, work effort estimates, staffing, timeline and dependencies based on confirmed availability of Client resources	
Implementation – Pilot	Development of RPA robots	Supplier responsible	
	Refinement of project plan	Refine tasks, work effort estimates, staffing, timeline and dependencies based on confirmed availability of Client resources	
Implementation – Production	Move to Production	Movement of Pilot stage robots to production	
	Maintain and Run	Maintain and Run process robots	
	Review	Review of robot progress and error log; monitor for issues; escalate as necessary	
	Refine Project Plan	Refine tasks, work effort estimates, staffing, timeline and dependencies based on confirmed availability of Client resources	
Robot Management – Quarterly Reviews	Process Review	Create process review document to improve quality of the robots and the processes they automate	
	Process Automation	Create new process automation suggestions for new processes and other automation opportunities	

2. **Description of Services.** To ensure successful and timely implementation of the project, Client must identify the appropriate resources. The Project Plan shall be mutually agreed upon between the parties with respective timelines before the start of any Project.

2.1. **Overall Responsibilities.** This table defines the overall project responsibilities for Supplier and Client. In general, the teams will work together to define and implement the overall solution; however, the table below defines the overall responsibility for the main project activities.

Supplier	Client
<ul style="list-style-type: none"> <li>• Detailed implementation of the Project Plan</li> <li>• Project tasks, deliverables, resources and timeline for the Define phase of the project</li> <li>• Links with major project milestones throughout the remaining phases in the project lifecycle</li> <li>• Dependencies and critical path items</li> <li>• Team resourcing plan</li> <li>• Define process documentation</li> <li>• Create calendar of automation</li> </ul>	
	<ul style="list-style-type: none"> <li>• Create Reporting Mockup</li> <li>• Document with the changes desired to summary/commission detail reports</li> </ul>
<ul style="list-style-type: none"> <li>• Revised project planning</li> <li>• Create detailed update of the project tasks</li> <li>• Document changes to deliverables</li> <li>• Document resource changes</li> <li>• Document timeline changes</li> <li>• Create re-estimation if necessary (using templates from Prepare stage)</li> </ul>	
<ul style="list-style-type: none"> <li>• Configuration and development of UiPath software</li> <li>• Robot configuration and management</li> </ul>	
	Create UAT (user acceptance testing) test plan, including test criteria and scenarios for each major testing stage
Update and revise project plan as needed to account for approved changes	
<ul style="list-style-type: none"> <li>• Create Project Management Toolkit, including tasks, assignments, work effort estimate, dependencies, start/finish date</li> <li>• Update throughout the project</li> </ul>	
Create and maintain Status Reports, including: accomplishments during the current period, forecasted accomplishments for the next reporting period, schedule updates	

Create and maintain Issue Log, including: description of each issue, status of approval, assignment for resolution

2.2. **Key Considerations.** Supplier’s methodology contains key focus areas that are required to ensure the implementation of UiPath RPA technology meets Client’s needs, including:

Key Focus Area	Description
Client Success Manager	The Customer Success Manager will have responsibility for overall project success. The responsibilities of the Customer Success Manager will include the management of day-to-day activities, on-time completion of deliverables, coordinating issue resolution, managing risks, providing status updates, managing project resources and maintaining the overall project quality.
Client Status Reporting	Status reports will be created monthly and discussed during status meetings. Status reports will include the progress of all major milestones, issues and updates, including an updated project plan.

2.3. **Deliverables Sign-Off Process.** The criterion for sign off on UAT is the successful execution of scenarios, processes, etc. signed-off and mutually agreed upon between Supplier and Client.

2.4. **Key Assumptions.**

2.4.1. Supplier and Client share joint responsibility for Project planning and management. All Supplier Project resources will report to the Supplier Project Manager and will use methodologies, tools and templates to be determined by the Supplier Project Manager and approved in advance by the Client Project Manager (or other person authorized by the Client).

2.4.2. Client will identify all outside consultants and partners who will participate in the project, along with their roles and contact information.

2.4.3. Client has the responsibility for implementing security guidelines it deems appropriate for use of the solution by Client employees and for user access and password security and maintenance administration. Client is responsible for the actual content of any Client provided data file, selection and implementation of controls on its access and use, and security of the stored data.

2.4.4. Client will designate a Client Project Manager to serve as the principal point of contact and facilitate sign-off, resolution and escalation of issues and Deliverables in accordance with the Agreement. Supplier will ensure timely progress/completion of deliverable on which a Client’s deliverables and resources are dependent – e.g. documentation for Client review, solution readiness for user acceptance testing etc.

- 2.4.5. Client will constitute a Steering Committee and maintain executive focus and sponsorship at all stages of the project
  - 2.4.6. Any project delays because of the deliverables on Client's side might result in an impact on implementation timelines and project costs.
3. **Project Schedule/Plan.** A detailed project plan will be created for each process that is automated and managed. These indications are to be used as a general guide and do not consider unforeseen factors, force majeure events or changes to the Project requested by client. Supplier shall keep Client advised of project progress against timelines and shall advise Client, in writing, of any delays, the cause of said delays and planned steps to mitigate the impact of delays upon the Project.
4. **Fees and Expenses.**
  - 4.1. The fees for this Project ("Project Fees") are \$2,000.00 per month for a bundle of six (6) robotic processes (\$500 per process per month, plus 2 free processes when purchased in a bundle), for a total annual fee of \$24,000.
  - 4.2. Additional processes can be added automated for \$500 per month each.
  - 4.3. Project Fees will be invoiced, payable, and subject to restrictions as follows:
    - 4.3.1. Commencing on the first of the month following execution of this agreement;
    - 4.3.2. Thereafter, at the beginning of each calendar month, and continuing on a month-to-month basis until terminated according to the terms stated in section 7.
    - 4.3.3. All invoices are payable net 30 days from the date of each invoice.
  - 4.4. Expenses. Project Fees do not include travel expenses and other approved expense. Travel and any other approved expenses will be invoiced on a monthly basis and are payable net 30 days from the date of each invoice.
  - 4.5. If a process to be automated is highly complex or requires additional software or hardware to be provided that is not anticipated by the Supplier, Supplier shall provide client with a written statement of any such additional fees and expenses to be charged as a result thereof prior to commencing development of such automations. Client
5. **Term.** The term of this SOW shall commence on the effective date and shall be in effect until terminated as described in section six of this SOW or for a period of five (5) years therefrom ("Term").
6. **Termination.** Client may **terminate this SOW for any reason** upon providing to Supplier two (2) months' written notice. In the event Client desires to terminate this SOW before the expiration of the Term and Client would like to maintain internally the automations developed by the Supplier, the Client would be required to pay Supplier an amount equal to 12 times the current monthly payments being made at the time of termination.



**7. Other Terms and Conditions.**

- 7.1. All Project Fees are exclusive of any applicable taxes now existing or which may come into existence in the future and shall be payable over and above by Client.
- 7.2. All other Terms and Conditions not set forth herein shall be governed by the Managed Services Agreement.
- 7.3. The terms of this SOW shall prevail over the Managed Services Agreement to the extent of any inconsistency.

Dated: \_\_\_\_\_

Supplier	Client
Name:	Name:
Title:	Title:
Signature: _____	Signature: _____
Email:	Email: