



STATEMENT OF WORK

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PREAMBLE

This Statement of Work accompanies an Agreement that has been executed by the parties. All statements of fact contained in this Statement of Work are subject to the terms and conditions set forth in such Agreement. The terms and conditions set forth in the Agreement control in the event of any inconsistency between such terms and conditions and the matters set forth in this Statement of Work.

Phase I

1.0 Scope and Deliverables

- a. Project Kick-off and Planning ICMI's operational assessment begins with a kick-off call during which team members are introduced, roles are defined, a communications plan is developed, initial milestones are identified and the on-site agenda is discussed. Prior to the kick-off call, ICMI will submit a data collection form to the SBCERA project team which requests information and data regarding all facets of its contact center operations. Responses to the data collection form will familiarize ICMI's consultants with SBCERA's contact center operating environment as well as indicate particular operational areas where additional focus will be required while on-site. These responses essentially enable ICMI consultants to 'hit the ground running' once they arrive on-site, thus maximizing the efficiency of their time.
- b. Assess Current Contact Center Operations: One ICMI senior consultant will comprehensively assess SBCERA's contact center operation in San Bernardino CA. During the site visits, the ICMI senior consultant will meet with contact center leadership team to understand its vision for the future state of SBCERA's contact center operations. ICMI's senior consultant will then conduct discovery sessions to interview key stakeholders and personnel, conduct agent and supervisor focus groups, document and validate workflows and observe current processes across all functional areas of contact

center operations. Evaluating the current state of operations provides the baseline from which to assess gaps between the current state and industry best practice. Targeted recommendations can then be offered to close identified gaps.

The areas of focus for an operational assessment are segmented into a variety of activities, including but not limited to:

- *Organizational alignment*
- *Customer access strategy*
- *Recruiting and Hiring/Training*
- *Quality Assurance*
- *Performance Management/Coaching*
- *Workforce management*
- *Knowledge management*
- *Customer feedback*
- *Employee feedback*
- *Process*
- *Technology*
- *Self-service*

A second primary deliverable will be specific recommendations to SBCERA's contact center technology stack. To include:

- List of potential vendors who best satisfy SBCERA's requirements
- c. Analysis and Documentation: Following the on-site assessment, the ICMI senior consultant will analyze findings and assess courses of action. Specifically, they will:
- Identify gaps between the SBCERA current state and best practice in critical contact center operational areas
 - Assess courses of action, including options and tradeoffs, to eliminate identified gaps.
 - Assess potential changes required
- d. Report Findings and Recommendations: Upon completing its analysis, ICMI will prepare a summary report outlining assessment findings, the risks of maintaining the current state, recommendations designed to close identified gaps, and the business case for doing so.
- e. Implementation Timeline: ICMI estimates this project to be completed within one calendar quarter upon signed agreement. This assumes timely access to information and resources.
- Weeks 1-3 – Kickoff and remote data collection and review
 - Weeks 4-5 – Site visit and follow-up
 - Weeks 7-12 – Report creation, review, and delivery

Included in Phase I Project:

1 ICMI Training Symposium Pass – March 23-26 New Orleans. Choose a 2 day or 4 day pass.

Training Symposium

New Orleans, LA – March 23-26, 2020

4 Days - March 23-26, 2020

[Supervisor Leadership Development Program](#)

[Workforce Management Boot Camp](#)

3 Days - March 24-26, 2020

[Support Center Manager](#)

2 Days - March 23-24, 2020

[Customer Experience Accelerator Boot Camp](#)

[Essential Skills and Knowledge](#)

[Monitoring and Coaching](#)

2 Days - March 25-26, 2020

[Contact Center Strategy](#)

[Succeeding With Metrics](#)

[Trainer Development Workshop](#)

1 pass to ICMI's EXPO event May 11-14, 2020 in Fort Lauderdale, FL.

Check out our - [Program at a Glance](#)

<https://www.icmi.com/Contact-Center-Expo-Conference>

20 seats - Agent Online Training

ICMI's **Online contact center courses** provide interactive, on-demand learning at the highest level of flexibility, allowing students to navigate around their busy schedules and concentrate on specific areas of need.

<https://www.icmi.com/Training/online-training>

Agents Level Bundles:

1. Handling Difficult Customer situations: (strongest bundle) 2.5 hours of content
 - Avoiding Escalations
 - Managing Stress
 - Controlling the Call
 - Choosing Your Words
 - Managing Difficult Customers
2. Customer Management Basics: 2 hours of content
 - Asking Questions Effectively
 - Listening Actively
 - Building Rapport with Customers
 - Using Your Voice
 - Expressing Empathy

2.0 Price and Payment Options

Firm fixed price fee of US **\$39,000**.

Work may not be scheduled or commence until the SOW and signed Master Agreement are received by ICMI. Any additional work that is required outside the scope of this SOW requires

written approval by both Client and ICMI as described in the Change Control Process detailed in Section 4 below.

2.1 Invoices

Services will be invoiced according to the following payment schedule:

Payment Schedule

SOW received & before work commences: 100% of total services fee

2.2 Payment

Payment is due thirty (30) days after date of invoice. Client may not withhold any amounts due hereunder and ICMI reserves the right to cease work without prejudice if amounts are not paid when due. Any late payment will be subject to any costs of collection (including reasonable attorney's fees) and will bear interest at the rate of one (1) percent per month or fraction thereof until paid.

3.0 Expenses and Taxes

The price quoted for the Work does not include reasonable consultant travel and expenses. Client will be billed for actual expenses incurred by the consultant.

4.0 Change Control Process

The Change Control Process is the process which shall govern changes to the scope of the Project during the life of the Project. The Change Control Process will apply to new components and to enhancements of existing components. The Change Control Process will commence at the start of the Project and will continue throughout the Project's duration. Additional procedures and responsibilities may be outlined if mutually accepted by both Client and ICMI.

Under the Change Control Process, a written Change Request will be the vehicle for communicating any desired changes to the project. It will describe the proposed change; the reason for the change and the effect the change may have on the Project. The requesting party will submit a written Change Request to the other party. ICMI will supply the appropriate Change Management documents.

Both ICMI and Client will review the Change Request and approve it for estimation or reject it. The estimation will be as agreed upon in writing by ICMI and Client. The estimation will be used to determine the effect that the implementation of the Change Request will have on the cost and schedule of the Project.

If both parties agree, after the completion of estimation, to approve the implementation of the Change Request, then they will each sign the approval portion of the Change Request. Both parties must sign the approval portion of the Change Request to authorize the implementation of any change that affects the Project's scope, schedule or price.