

{CustomerLogo}

{CustomerName}

{ProjectName}

Scope Definition

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1. Project Overview

{CustomerName} has recently engaged TurboDocx to build a web application to service all of {CustomerName} franchises. {CustomerName} is now seeking a production readiness assessment as well as go-live support as more franchises onboard to the web application.

As part of this effort {CustomerName} has asked for TurboDocx to assist in production pilot deployment. The goal for {CustomerName} is to leverage our expertise to ensure a successful pilot and assist with the initial feedback loop for the rollout.

For this production pilot support TurboDocx will build and deploy the environment within {CustomerName}'s cloud infrastructure. Through this process TurboDocx will also work to define and document an extensible reference architecture. At the end of this phase, {CustomerName} and TurboDocx will evaluate future phases to expand to all franchises.

2. Project Scope and Estimated Hours

The approach for this engagement will follow the TurboDocx consulting methodology. The engagement will consist of the described activities. Activities not listed are considered out of scope.

Note: this engagement includes the deployment for the first five (5) franchises (Production pilot rollout), however, the AWS infrastructure review will be able to support up to 2500 franchises.

i. Scope:

{Scope}

TurboDocx provides an estimate of hours for each phase of the engagement and includes administrative and documentation time as part of this. TurboDocx reserves the right to re-allocate the budgeted hours as the project conducts to focus on areas that may need more attention.

ii. Out of Scope

The following items will be out of scope for this project:

- Adding additional net-new features to the web application.
- Okta / Identity configuration questions outside of the scope of the web application.
- Onboarding beyond 5 initial franchises.

- Hands-on direct support with franchises.
- AWS / Cloud configurations outside of the scope of the web application.
- Hands-on AWS access. All infrastructure sessions will be conducted using a screenshare over a videotelephony conference tool.
- Net-new AWS infrastructure build. Only the existing infrastructure for the web application will be assessed.

3. Project Documentation Deliverables

TurboDocx will provide the following documentation for activities within the scope of this engagement. This documentation is included in the overall work effort and fees for this engagement.

All documentation is thoroughly reviewed during the TurboDocx quality assurance process prior to delivery to review for technical accuracy, risk mitigation, and alignment with TurboDocx's leading practices.

i. Phase: Assess Current Infrastructure

- a. **Cloud Infrastructure Review Memo** – This memo will outline the findings and recommended next steps based off the discovery sessions and AWS review.
- b. **Rollout Strategy Memo** – This memo will outline the suggested rollout strategy to achieve a successful go-live at scale.

ii. Phase: Feedback and Bug Remediation

- a. **Feedback and Bug report Memo** – This memo will document and outline the issues found in the pilot group and the plan to remediate the issues prior to go-live.

4. Project Leadership, Status Reporting, and Change Management

i. Project Resources

TurboDocx will allocate one (1) project resource to assist with this engagement. At TurboDocx's discretion, TurboDocx may add additional project resources in order to adhere to project schedule.

ii. Status Reporting

TurboDocx will provide weekly status reporting in the form of an email, memo, or presentation to provide status on the deliverables, scope, and to highlight issues for management attention.

iii. Scope Change Management

TurboDocx follows a structured methodology with respect to managing unexpected scope changes. Such scope changes may be encountered in projects such as this one. If items requiring a scope change are identified, the following are the high-level steps that TurboDocx will follow:

- a) Discuss and confirm need for additional work with the {CustomerName}.
- b) Identify additional tasks and deliverables associated with the scope change.
- c) Estimate the work effort associated with the additional tasks and deliverables.
- d) Based on the work effort estimate, determine the impact on schedule and budget, including contingency.
- e) If the scope change does not require additional project budget, then TurboDocx will document any changes to project scope and/or deliverables in the form of a Scope Change Addendum. This will need to be signed-off by {CustomerName} prior to proceeding with the engagement under the new or modified Project Scope.
- f) If the scope change requires additional project budget a SOW Addendum or new SOW will need to be drafted.

5. Engagement Assumptions

i. General Assumptions

The following are the general assumptions for the engagement. Should {CustomerName} not be able to meet these assumptions, TurboDocx may not be able to complete some or all of the activities defined within the 'Project Scope' (Section 2) and 'Project Document Deliverables' (Section 3) within the current project budget. Contingency hours, if available, may need to be utilized and/or {CustomerName} would need to purchase additional hours in order to complete the project. TurboDocx will notify {CustomerName} of any potential risks to project completion and/or project budget in the form of a Project Risk Memorandum, which will detail the risks, recommendations for mitigation, and next steps:

- This Scope Definition must be executed by {CustomerName} for TurboDocx to be able to set the project start date. All project engagement start dates are dependent on TurboDocx approval. TurboDocx start date approval will be based on team and skills availability, as well as {CustomerName} readiness.
- If any critical assumptions are not met within a reasonable amount of time prior to the project start the start date may be delayed. This delay may result in project timelines being extended and additional effort from TurboDocx. This additional effort will trigger the Change

Management process as previously outlined. Any changes in the start date initiated by the {CustomerName} may result in a significant delay to the project start.

- {CustomerName} will confirm that the appropriate functional and technical resources (s) will be available throughout the engagement for technical discussions, build/configuration assistance, knowledge transfer, status meetings, questions, and requests.
- The appropriate {CustomerName} resources will be available to cover the topics detailed in the 'Project Scope' section (Section 2) of this document.
- {CustomerName} resources will be part of the project team and will be available throughout the project.
- All required hardware, software and necessary licenses will be set up, configured and operational in the target environment.
- Upon the conclusion of the engagement {CustomerName} will be responsible to resolve any ongoing technical issues.
- Upon conclusion of the engagement, the TurboDocx's project team will formally transition any processes and responsibilities back to {CustomerName}.

ii. Logistical assumptions

- **Full time virtual engagement** – TurboDocx's project team will be working in a remote capacity. No travel will incur as part of this engagement and no travel expenses will be submitted.
- **Flexible schedule virtual engagement** – TurboDocx's project team will be working in a asynchronous manner and will schedule time with {CustomerName}'s team when synchronous parts of the engagement are required.

6. Estimated Fees and Expenses

i. Consulting Professional Fees

Based on the level of effort indicated above and the staffing mix for the project, TurboDocx estimates the total fees to be approximately \${BillRate} USD plus applicable taxes. TurboDocx's offer of the engagement described in this SOW and any associated rates expire 90 days after initial receipt of this SOW. To take advantage of this offer, {CustomerName} must sign this SOW within such 90 day period.

As part of the project management function that TurboDocx will perform, any changes in requirements for work effort, staffing or schedule will be discussed and confirmed with {CustomerName} prior to the implementation of such changes. In order to facilitate scheduling, TurboDocx may begin Project Leadership work on administration and logistics (up to six hours per resource per week) for the project prior to the SOW being signed by both parties. Both parties agree that this SOW applies retroactively to govern such work.

