

**Cisco Webex Contact Center  
Implementation – Customer  
Contact Centers  
STATEMENT OF WORK  
CITY OF GEORGETOWN**

August 4, 2021

SOW#1003220001881

## PROPOSAL TEAM

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## CLIENT INFORMATION

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## REVISION HISTORY

Revision	Revision Date	Name	Notes
V0.1	6/1/2021	Jéanne Farrenkothen	Initial SoW
V0.2	6/7/2021	Pavan Davé	Revisions
V1.0	6/11/2021	Ted Kilgore	RAP Review & Approval
V1.1	6/15/2021	Pavan Davé	Final RAP Approved Version
V1.2	7/16/2021	Jéanne Farrenkothen	Additional edits
V1.3	08/02/21	Jéanne Farrenkothen	Additional edits

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## 1. EXECUTIVE OVERVIEW

### 1.1. Introduction

Presidio Networked Solutions Group, LLC (“Presidio”) is pleased to propose the following solution to City of Georgetown (“Client”). This Statement of Work (“SOW”) defines the scope of work to be accomplished by Presidio. The tasks to be performed by Presidio are defined and the responsibilities of Presidio and Client are contained herein as well.

Presidio will configure the systems outlined within this Statement of Work, with a unique set of authentication credentials, unless otherwise provided by Client. Upon the completion of the engagement, Presidio will provide Client with all usernames, passwords, and additional authentication information that were implemented during the engagement. Presidio strongly recommends that these credentials be changed upon the completion of the engagement.

### 1.2. Solution and Approach Overview

Presidio has been engaged by the Client to implement a Cisco Webex Contact Center cloud call center for its Customer Contact Centers in Georgetown, TX. Cisco Webex Contact Center (WCC) cloud platform will be installed to handle up to ten (10) concurrent agents/supervisors at the Client’s Georgetown, TX location for voice, chat and email services only. The client’s phone numbers shall be ported to Cisco PSTN.

No application integration is included in Presidio engineering professional services.

Quality Management from Calabrio to include call and screen recording, as well as quality management, which will be configured and installed, to support up to nine (9) named users (anyone accessing the system). Please reference Appendix A for the Calabrio scope of work.

Webex Contact Center will integrate with City of Georgetown telephony environment with an over-the-top connection through the PSTN with externally reachable direct inward dial (DID) numbers. There will be no direct CUBE integration or configuration as a part of this scope. This scope assumes each agent already has an externally reachable number configured.

Presidio will also configure the following:

- One (1) Google Dialogflow Chatbot for Frequently Asked Questions (FAQ’s)
- One (1) Email Queue
- One (1) Chat Queue

### Licensing

Part Number	Description	Quantity
A-CJP-CNPN	Webex Contact Center Premium Named Agent 10	10
A-CJP-NQM	Quality Management Named Agent	9
A-FLEX-WCC-DID	Webex Contact Center PSTN Audio Toll Inbound	10
A-CJP-RTS	Real Time Storage 50GB Monthly 2Real Time Storage 50GB Monthly 2	2
A-FLEX-WCC-TF	Webex Contact Center PSTN Audio Toll Free Inbound	10

### 1.3. Locations

Work will be done at the following locations. All work will be performed remotely unless otherwise specified.

Site Name	Address	On-Site / Remote Services
Georgetown, TX	300-1 Industrial Ave, Georgetown, TX 78626	Remote

## 2. SCOPE OF WORK

### 2.1. Approach Description

To support the solution, Presidio will review requirements related to the scope at hand. Presidio will then develop a design document (Detailed Design Document (DDD) to capture project detail, to be approved by Client.

Based upon the review, Presidio will develop an implementation and verification test plan (jointly with the Client) to be used to determine the success of the project.

Presidio will provide Train-the trainer training.

Finally, Presidio will assist with the cutover to the Cisco WCC cloud platform. Presidio and the Client will jointly implement the mutually developed verification test plan.

### 2.2. Design Diagrams

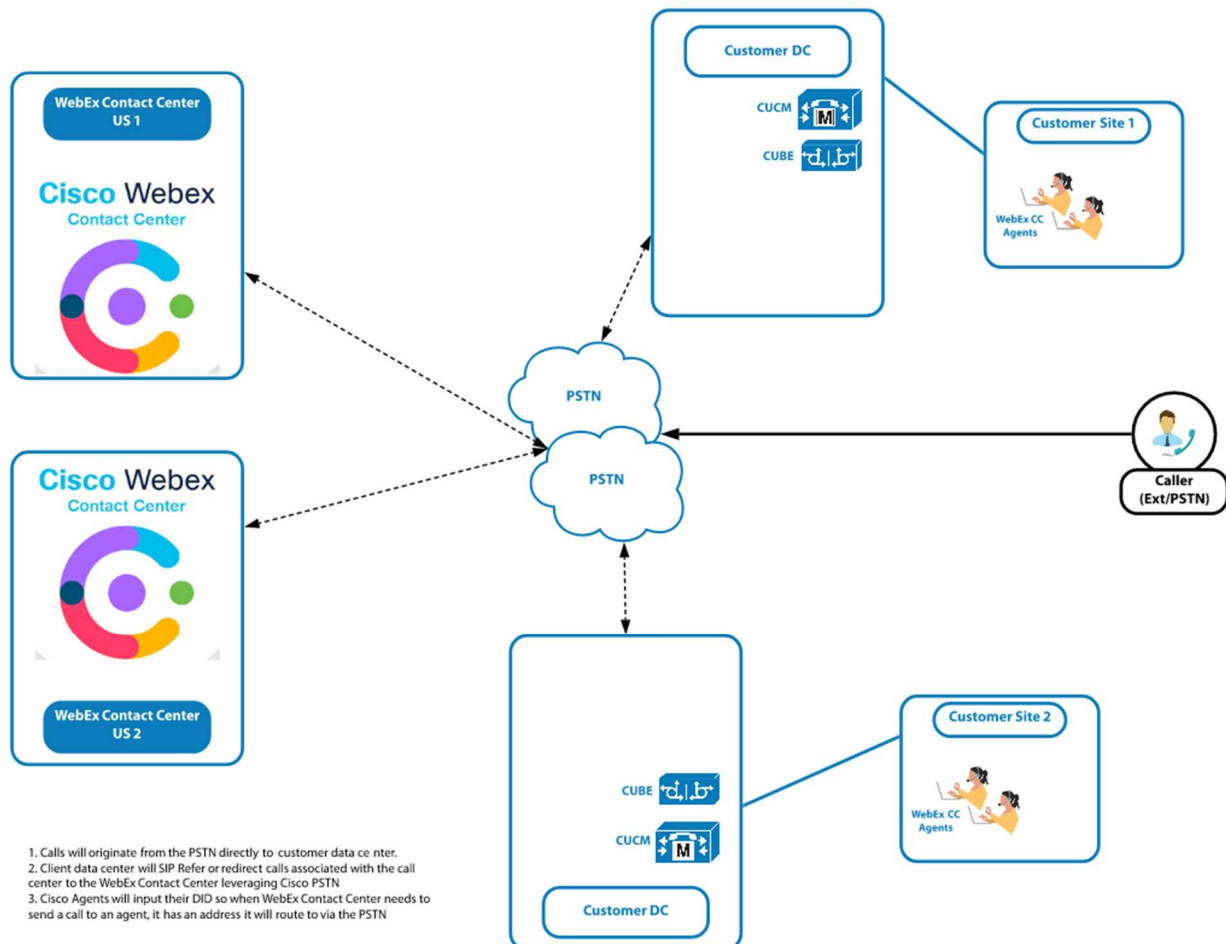


Figure 1 - Webex Contact Center with Cisco PSTN

## **2.3. Deployment Scope**

### **2.3.1. Kickoff Meeting**

- a) Planning and Review with the Client (External Kick-off)
- b) Schedule Status Meetings

### **2.3.2. Review & Design Phase**

#### **Review / Design**

Provide up to one day of workshops to conduct discovery for voice workflows and to capture configuration requirements:

- a) Review the required dial plan for ingress PSTN
- b) Review and Document IP addressing and network information
- c) Review Business Requirements to define Configuration and Call Flows for WCC

#### **Documentation**

- a) Develop Design Document (DDD) for WCC
- b) Review DDD with the Client
- c) Project Completion and Acceptance Document. (Working in accordance with customer during User Acceptance Testing (UAT) as defined during design phase).

### **2.3.3. Implementation Phase**

#### **Cisco WCC Configuration**

- a) Presidio will configure Agents in Cisco WCC platform
- b) Presidio will build Business Logic Call Flows in Cisco WCC Platform:
  - i. Number of Named Agents/Supervisors Total - 10
  - ii. Number of Teams - 1
  - iii. Number of inbound phone numbers – up to three DID's
    - A. Voice – build one IVR in English and in Spanish with one 4x2 menu
    - B. Google Dialogflow (GDF) for directed dialog
      - a. 1 menu
      - b. 300 calls/day
      - c. 675 calls/peak
    - C. Telephony User Interface (TUI) for emergency message (will require local database at customer end with API access)

- D. Collect phone number to append to a URL for a screen-pop in UMAX
- E. Get Address or Utility account number from customer leveraging GDF
- F. Use phone number in a URL for a screen pop
- G. Callback
- iv. Number of Email Queues – 1
  - A. Email system – Office 365
  - B. Up to 1 email address mapped to 1 queue
- v. Number of Chat Queues – 1
- vi. Number of Chatbots – 1
  - A. FAQ chatbot with up to 10 questions and responses.

### **2.3.4. Cutover / Testing Phase**

#### **Testing**

- a) Presidio will provide ready for use functional testing before handing over to the client for User Acceptance Testing.
- b) Presidio will provide up to four (4) hours of support to the client during UAT Testing

#### **Training**

- a) Presidio will provide one (1) hour of agent train the trainer training
- b) Presidio will provide one (1) hour of Supervisor training
- c) Presidio will provide four (4) hours of Admin training

#### **Cutover**

- a) Presidio will produce a cutover plan that will be followed for the cutover event and includes pre-cut tasks to complete, cut event tasks with estimated duration of each task, escalation contacts for the cut event, staffing, tracking log of post cutover issues and support, contingency plan.
  - i. Should there be a need to revert the cutover event due to technical reasons by error of Presidio, there will be no cost for an additional cutover event.
- b) Perform a single cutover
- c) Provide one (1) day of support post go-live before handing over to Presidio Managed Services
- d) Cutover may be performed after hours at a time and date agreed upon with the City of Georgetown.

### Punch List

- a) Presidio will create, maintain, review and resolve punch list items post-cutover as required. City of Georgetown will have access to the punch list with the ability to review as needed.
- b) Project Closure is not official until go-live issue cut-sheet has been approved by the City of Georgetown.

### As-built Documentation

- a) Update DDD with As-Built configuration information

## 2.4. Deliverables

Documentation may be created by Presidio and provided as part of the Project Deliverables. Some of these deliverables may be delivered as a single document. The specific documentation to be provided depends on your chosen solution(s); several example documentation items are listed below. Additional documentation and/or printed documentation are available upon request for an additional cost.

Deliverable	Format
Design Document - WCC and PSTN Configuration	PDF
Updated Design Document with As-Built configuration for WCC and PSTN	PDF

Each deliverable will be approved in accordance with the following procedure:

If a written list of requested changes to an agreed upon deliverable is received within five (5) business days, the Presidio Project Team will make the mutually agreed upon revisions or provide detail to support original or revised input, and will, within five (5) business days, re-submit the updated version to Client

- At that time Client has five (5) business days to review and request changes for the final document. If no written response is received from Client within five (5) business days, either accepting or requesting changes, then the deliverable material shall be deemed accepted.
- Deliverable documentation may be delivered via email, uploaded to a portal, or provided on a physical media and it may be provided in either an encrypted or unencrypted format. If Client requests a specific delivery method and format, Presidio will use that method for all documentation delivery and format otherwise, the sender will choose a delivery method and format that they feel is appropriate given the content of the documentation.

## 2.5. Project Coordination

Presidio will provide a Project Manager (PM), who will be single point of contact for all project support issues within the scope of this project. The PM is experienced in project management best practice methodologies and familiar with the technology involved. This Project Manager is responsible for the overall project timeline, scope, budget management, resource scheduling/tracking, communication planning, and execution in accordance with the Presidio Lifecycle Methodology.

Included for our Cloud Starter Project Management offering for this engagement are the following:

- Project kickoff (remote)
- Resource Management
- Scope/budget Management
- Escalation facilitation
- Planning and design session facilitation
- Deliverable/milestone tracking (High-Level Plan)
- Standup Call 15-30 Minutes 2-3 times a week, Action/Task List Tracking
- Project closeout

## 2.6. Resources

Presidio approaches project execution from a skills-based perspective. Our Execution Team is made up of individuals who have specific skill sets that will be utilized at different times during a given project. This allows us to provide a very specialized workforce to Client and utilize the appropriate resource for the task required.

### Presidio Engineering Resources

**Practice Manager(s)** – the technical manager and regional team lead of the field consulting team. The Practice Manager provides resource and technical oversight assistance to the Project Manager and ensures availability of technical resources and escalation paths for field consultants.

**Architect / Senior Engineer(s)** – the technical escalation points for Engineer(s) and Project Oversight teams. An Architect or Senior Engineer is a subject matter expert within a certain technology or field. This senior level resource will be the principal technical resource for the engagement and will have ownership of the final deliverables.

The following Presidio resources will be engaged on this project:

- Contact Center Lead / Architect

Contact information for the project team personnel will be distributed by the Project Manager.

### Client Resources

Throughout the project, Client resources may be required for completion of specific tasks, providing key information or data, oversight, review, and approvals. The responsibilities of Client are outlined in this document.

The following Client resources will be engaged on this project:

- Contact Center Engineer
- Contact Center Manager/s
- Network Engineer
- Security Engineer

Contact information for the project team personnel will be distributed by the Project Manager.

## **2.7. Training and Knowledge Transfer**

Presidio will provide up to two (2) hours of training for the WCC Agent and Supervisor functions, using a “Train the Trainer” format. In this format, Presidio will conduct sessions with a subset of the user population, who in turn are expected to propagate that knowledge to the rest of the user community.

Presidio will also provide up to four (4) hours of formal Administrator Knowledge Transfer to the Client’s IT staff, covering the configuration and call flows in WCC only.

All other training activity will be informal and transferred by nature of working with the Client’s IT and business teams throughout the project.

## **2.8. Project Change Request Process**

In the event that both Presidio and Client agree to a change in this Statement of Work, a written description of the agreed upon change will be prepared using a Project Change Request (PCR) form, which both parties must sign. The PCR form will be used to describe the change, the rationale for the change, and to specify any change in the charges, estimated schedule, or other terms. Depending on the extent and complexity of the requested changes, Presidio may charge for the effort required to analyze it. When charges are necessary to analyze a change, Presidio will provide a written estimate and begin the analysis upon written authorization from Client. The terms of a mutually agreed upon Change Authorization will prevail over those of this Statement of Work or any previous Change Authorization.

### 3. ASSUMPTIONS

Presidio makes the following assumptions in developing this Statement of Work. These assumptions serve as the foundation to which the project estimate, approach and timeline were developed. By signing this SOW, Client agrees that these assumptions are correct and valid. Any changes to the following assumptions must be processed using the Presidio Change Management Process and may impact the project duration and labor requirements.

#### 3.1. General Assumptions

The following project assumptions are made and will be verified as part of the engagement:

- a) All Presidio activities will take place during normal working hours (Monday through Friday, 8:00 a.m. to 5:00 p.m., excluding holidays) unless noted as “Off Hours” in this SOW.
- b) Any items or tasks not explicitly listed as in-scope within this SOW are considered to be outside of the scope and not associated with this SOW and price.
- c) Changes to the Design, Equipment List or proposed timeline presented to Client in this SOW will require a Project Change Request. A Project Change Request could impact the cost of the project
- d) Presidio will not be held responsible for troubleshooting networks, applications and/or hardware if Client has no formal change management documented processes and policies
- e) All maintenance is current on any new and existing equipment that is part of this project. All applications have active and up to date maintenance contracts.
- f) Presidio will not make changes to the configuration of any network equipment after it has been installed and successfully tested.
- g) All tasks as stated within this SOW are subject to scheduling and may occur in a non-consecutive timeframe.
- h) The Test Plan only tests basic functionality of the products; it does not measure performance, nor does it have required or specified outcomes. Therefore, these are pass/fail only tests.
- i) The Client’s network must support the necessary network traffic as identified by the application vendor documentation/solutions reference design guides for products being installed under this statement of work. Any configuration of network devices or firewalls is the Client’s responsibility. Discovery or troubleshooting of a client’s network issues will be performed via a Project Change Request. Presidio has provided the documentation outlining the network requirements.
- j) Additional required tasks discovered after the execution of this SOW that are not mentioned in this SOW will require a Project Change Request.
- k) All documentation will be furnished in English in soft copy only.
- l) Deployment is planned for a single cutover event to be conducted off hours

### **3.2. PSTN Assumptions**

- a) The Client is responsible for porting of numbers to Cisco PSTN with their existing provider. Presidio and Cisco will assist in coordinating this, if applicable
- b) The Client has sufficient capacity in their existing telephony environment for inbound agent call legs.
- c) Client will perform any on-premise telephony configurations that may be required as a part of this project with guidance from Presidio.
- d) Labor pricing is based upon migration of all call center users over one flash cut.

### **3.3. WCC Assumptions**

- a) All services for implementation and training will be provided in English
- b) Services required out of hours that are not specifically called for within this SOW will incur additional charges
- c) No Wallboards are included in this Scope of Work
- d) No custom reporting is included in this Scope of Work
- e) No IVR self-service applications are included in this Scope of Work
- f) No application integration is included in Presidio engineering professional services.

### **3.4. General Client Responsibilities**

The following items are listed as responsibilities of Client for this engagement. Client is responsible for performing the items and activities listed in this section or arranging for them to be performed by a third-party if appropriate.

- a) Provide a single Client point of contact with the authority and the responsibility of issue resolution and the identification, coordination and scheduling of Client personnel to participate in the implementation of the SOW.
- b) Participate in any required design sessions or workshops.
- c) Provide or procure all appropriate hardware, software, licensing and media required for implementation of the SOW.
- d) Supply current equipment configuration for review if applicable.
- e) Schedule appropriate maintenance windows for system upgrades or installs and notify user community.
- f) Provide all required functional access (passwords, IP address information, etc.), as required for Presidio to complete the tasks.
- g) Provide to Presidio all required IP addresses, passwords, system names, and aliases.
- h) Provide remote access for troubleshooting and configurations related to the project - preferably VPN access, as necessary.
- i) Provide requested documentation or information needed for the project within two (2) business days, unless otherwise agreed to by all parties.
- j) Ensure all Cat. 5 (or higher) and fiber cable infrastructure is in place and tested (for all sites).

- k) Provide IVR prompt recordings in format specified during the design workshop.
- l) Provide all FAQ content for bot interactions.
- m) Provision a Google cloud account.

## 4. LIFECYCLE METHODOLOGY

Presidio has developed a project methodology that utilizes best practices from our experience throughout the project lifecycle. Our process begins during the presales process as we gather critical data points, design the appropriate solution, and set reasonable expectations. This process continues through project delivery as our Account Management, Project Oversight, and Service Delivery teams work together with Client to manage and deploy Client solution as effectively and efficiently as reasonably possible, within the constraints of the agreed upon scope, budget, and timeline.

### 4.1. Project Initiation and Kickoff

Once the Statement of Work has been executed and the proper financial and legal approvals are received, the following occurs:

- a) The Presidio Professional Services organization officially opens the project and assigns a Project Manager; this assignment is dependent upon the deliverables and requirements elected within the Statement of Work.
- b) Once the Project Manager has been assigned, the Initiation Phase begins. During the Initiation Phase, the Presidio Project Oversight and Technical Management teams perform a thorough evaluation of the project scope; they identify the Project Team most appropriate for the technical and business requirements described.
- c) When the Project Team is assembled, an Internal Kick-off Meeting is held; during this meeting, the Presidio Account Management and Solutions Architecture teams brief the Project Team and formally hand over the technical execution of the project. Stakeholder identification, solution briefing, Client responsibilities, and estimated timelines are all topics discussed during the Internal Kick-off Meeting.
- d) Once the internal kick-off has occurred, the project moves forward with the scheduling of a formal Project Kickoff with Client.
- e) The Project Kickoff marks the official beginning of the work associated with the approved Statement of Work. The way in which the Project Kickoff is handled is directly dependent upon the method of project oversight elected within the Statement of Work; however, with either model, the purpose of the Project Kickoff is to:
  - i) Introduce the project manager and service delivery team
  - ii) Review resource, roles, and responsibilities
  - iii) Review project goals and objectives
  - iv) Review scope
  - v) Review high-level design (if applicable)
  - vi) Review change control process
  - vii) Review milestone process
  - viii) Review escalation process
  - ix) Review client responsibilities
  - x) Review current product ship dates and delivery addresses (if applicable)
  - xi) Review timeline expectations

## 4.2. Planning and Design

The Planning and Design Phase incorporates detailed discovery, analysis, planning, and knowledge transfer. The results of this phase may include detailed, functional, design specifications, and a specific project and migration plan, as well as and testing plans. Detailed planning is necessary to ensure that the proposed solution will meet project requirements and help to reduce risk of an unsuccessful or unexpectedly expensive Execution Phase. The Planning & Design documents are the technical and operational foundation for a successful execution.

Depending on the number of services offerings included within this Statement of Work, multiple technical Planning and Design meetings may be required. The estimated number of recurring Planning and Design sessions are indicated in this Statement of Work; for details, see the topic Project Scope

In an effort to realize scheduling efficiencies, multiple planning and design sessions may be combined; this depends on the availability of Presidio and Client resources.

During the Planning and Design session, the following occurs:

- The Presidio team utilizes a design checklist to ensure that all necessary information is discussed and clearly articulated to Client team.
- Capabilities and features of the solution as elected in Statement of Work are explained.
- Technical and logistical requirements expected from Client are explained.

## 4.3. Project Implementation

During the Project Implementation phase, the Presidio Project Team performs configuration, deployment, and migration of the technologies as indicated in this Statement of Work; for details, see the topic *Project Scope*.

The following are some essentials regarding the Implementation phase:

- Depending on the project phases defined and agreed upon in this SOW, the Project Implementation phase may occur multiple times.
- To minimize the impact on Client's business, it is strongly recommended that deployments and migrations occur during a scheduled change control window. The number of migrations included in the project is detailed within this Statement of Work.
- Client is responsible for managing and providing the necessary paperwork or presentations in accordance with their change control processes. For an additional fee, Presidio's assistance with Client's change control processes may be requested.
- Prior to any migration, the Presidio Project Team works with Client's project team to co-author a Migration or Cutover Checklist document as well as a Test and Acceptance document to ensure that the migration of the technical services are properly planned and followed.
- This plan exists to ensure that the overall functionality is working as designed and Client will be required to accept the authenticity of the plan via signature. Therefore, it is essential that Client participate in creation of the migration/cutover and the test and acceptance plan

#### 4.4. Post-Cutover Support and Operational Handoff

Post-Cutover Support is an available option after each major migration. As part of this support, the Presidio Project Team works alongside Client's project team to assist with support of the systems within Presidio's control during the allotted time. This helps to:

- Ensure that the deployed applications and services are performing as designed.
- Proactively identify and resolve issues related to the services provided by Presidio within the Statement of Work.
- Assist with approved changes during Post-Cutover Support as requested.

The completion of Post-Cutover Support marks the Operational Handoff of the deployed solution to Client. From that point forward, the maintenance and operation of the implemented equipment and applications is Client's responsibility unless Presidio is contracted to provide Managed Services support.

Presidio will provide one (1) day of Post-Cutover Support directly following cutover.

#### 4.5. Project Closure

At the completion of the project, Presidio will perform a Project Closure meeting. Presidio and Client will perform the following activities

- Review the final deliverables for the engagement.
- Review project objectives to ensure that they have been completed as outlined within the SOW.
- Have both Presidio and Client sign the final project milestone and acceptance document.
- Identify any follow up items or actions that may be required or desired by Client.

#### 4.6. Escalation Path

Client experience is of the utmost importance to Presidio. If at any time a Client feels the need to escalate an issue or concern, please consider the escalation points and options described below.

##### Level 1

- **Account Manager** – Client's first point of escalation is always their Account Manager. The AM can facilitate additional escalation if required and coordinate meetings between the required people within Presidio and Client in order to swiftly resolve any issues.
- **Project Manager** – for projects that include Project Management, the Project Manager is an escalation point for any concerns or questions.
- **Practice Manager** – for technical issues, the Service Delivery team will reach out to the manufacturer's support avenues within one (1) hour of identifying an issue. If additional technical escalation is warranted, the Presidio Practice Manager will be contacted after that time.

## Level 2

- **Service Delivery Director** – if the issue is not resolved within an hour, the Service Delivery Director will be contacted for additional escalation and action. For technical issues escalated by the Delivery Team, the Service Delivery Director will:
  - Contact and speak with Client via phone to explain the status
  - Develop a plan of action
  - Communicate the plan of action status and completion to Client
  - Contact the Operations team, as required, to request additional resources, as required, in order to execute the plan of action.

## Level 3

- **Services Vice President** – if the issue or concern cannot be addressed or resolved within Level 1 or Level 2 of the escalation process, the issue will be raised to the executive level for visibility and resolution.

### 4.7. Technical Support after Completion

For non-critical support, including system expansion options, assessments, audits, and related services, or services that are not covered by a support contract with Presidio or another vendor, Presidio offers a variety of options including Fixed Fee, Hourly Rate, or Daily Rate options. Pricing for these services is not included in this Statement of Work.

## 5. PRICING

Presidio is providing a Fixed Fee Price as part of this Statement of Work. Presidio will invoice Client based on the project milestone(s) listed below:

Milestone Name	Amount
WCC Cloud Essential Complete	\$ 28,000.00
WCC Enhancements – Email, Screen pop, Callback, TUI Complete	\$ 11,700.00
WCC GDF Chatbot Complete	\$ 12,500.00
Calabrio Design Complete	\$ 6,850.00
Calabrio AQM Implementation	\$ 9,500.00
Calabrio Training Credits	\$ 4,500.00
<b>Total</b>	<b>\$ 73,050.00</b>

Presidio will bill Client upon completion of each Milestone. Invoices may contain multiple Milestones.

- Applicable tax, travel and expenses are not included in the cost listed above and will be billed on an actual cost basis. Expenses not expected to be incurred as work will be performed remotely.
- If Client requires a change in the scope of work, the parties will negotiate in good faith to generate a written change order documenting the additional labor and requirements that will be mutually agreed upon by the parties prior to onset of the additional work.

### 5.1. Expenses

Travel and incidental expenses incurred by Presidio in association with the execution of this Statement of Work are NOT included in the amounts listed above and are to be reimbursed to Presidio by Client at actual cost within 30 days of submission of invoice to Client. No expenses are expected to be incurred since all work will be performed remotely.

## 6. TERMS AND CONDITIONS

This Statement of Work is governed by the terms and conditions set forth in the Texas Department of Information Resources Contract# DIR-TSO-4167.

## 7. APPROVAL SIGNOFF

The use of signatures on this Statement of Work is to ensure agreement on project objectives and the work to be performed by Presidio.

Presidio signature signifies our commitment to proceed with the project as described in this document. Please review this document thoroughly, as it will be the basis for all work performed by Presidio on this project.

This Statement of Work is valid for a period of sixty (60) days from the date that this Statement of Work is provided by Presidio to Client unless otherwise agreed to by both parties.

### City of Georgetown

---

Signature

Date

---

Printed Name

### Presidio Networked Solutions Group, LLC

---

Signature

Date

---

Printed Name & Title

## **A. APPENDIX A – CALABRIO STATEMENT OF WORK**

### **a. Solution Description**

SOW Type: New Install

### **b. Professional Services Required**

Professional Services have been purchased for the following Cloud Solution:

- Quality Management
- Data Explorer
- Training
- ACD Type
  - Cisco WebEx Contact Center

### **c. Calabrio Deliverable(s)**

- Overall Project and Project Management
  - Designate a Calabrio Project Manager who is the primary point of contact for the Customer and Presidio
  - Designate a Calabrio Implementation Engineer to participate in configuration and implementation of the ordered products
  - Designate additional Calabrio resources to assist with the implementation as required
- Project Kick-off meeting and up to one weekly project status meeting included
  - Design Meetings for each Calabrio product purchased
  - Project Plan and Project tasks required to implement purchased Calabrio products
  - Confirm Calabrio applications are licensed with purchased features
  - Facilitate functional testing of Calabrio applications with Customer
  - Facilitate product training as purchased on Calabrio applications
  - Support Customer's User Acceptance Testing (UAT) including issue resolution and re-test activities
  - Set-up and Debrief with Calabrio Support before Go Live event
  - Support one (1) Go Live event per purchased Calabrio product
- Data Explorer (DX)
  - Validate data collection from Calabrio database
  - Validate population of non-custom product report(s)/dashboard(s)
- Quality Management (QM)
  - Lead QM Discovery Meeting(s)
  - Document QM Design per Discovery Meetings(s)
  - Deploy ACD Capture/Sync application on customer-provided server
  - Configure up to five (5) QM user roles
  - Configure up to ten (10) teams
  - Configure up to five (5) groups
  - Configure up to five (5) retention workflows
  - Configure up to five (5) evaluation forms
  - Configure up to five (5) goals
  - Custom metadata configuration services are NOT included
  - Third party integration services are NOT included

- Cisco WebEx Contact Center
  - Confirm Calabrio tenant is set up and available for customization.

#### **d. Training**

Training credits have been provided to allow for a customized training plan. Available classes and number of credits needed for each class is available on the Calabrio Success Center at <https://success.calabrio.com>.

#### **e. Customer Prerequisites and Responsibilities**

- Overall Project and Project Management
  - Provide a single point of contact for communications and Customer responsibilities, such as a Project Manager
  - Refer to the Calabrio Installation Guide(s) for complete details on supported system design and compatibility.
  - Establish any security requirements prior to implementation
  - Responsible for all non-Calabrio components of the solutions
  - Place Calabrio software and license files on any Customer-provided servers
  - Participations in Discovery Meetings, Status Meetings, Functional Testing, and Training
  - User Acceptance Testing (UAT) for Calabrio applications
- Data Explorer (DX)
  - Refer to references/documentation on the Customer Success Center
- Quality Management (QM)
  - Deployment of the WebM plugin for call playback in Internet Explorer 11
  - Deploy Desktop Client Software as required for Screen Recording
  - Provide connection credentials to recording API URL's
- Cisco WebEx Contact Center
  - Customer is responsible for hosting a separate data server for any integration outside of Cisco WebEx Contact Center.
  - Cisco WebEx Contact Center is responsible for providing the appropriate connectivity and integration of the Cisco WebEx Contact Center environment as well as any troubleshooting pertaining to this API Integration.

#### **f. Project Assumptions and Requirements**

- Calabrio ONE Cloud
  - Unless otherwise directed by Customer and agreed to by Calabrio, Calabrio intends to use a data center location in the United States for Customer's deployment. Customer agrees that it is the sole responsibility for the Customer to comply and adhere to all applicable international regulatory requirements.
- Calabrio ONE Quality Management (QM)
  - If using SDC for audio recording, any software on a PC with the Smart Desktop that interferes with, redirects, or otherwise hides network traffic will cause the Smart Desktop to fail to function correctly.
- Out of Scope
  - This SOW does not include any features or services not specifically stated as a deliverable in the SOW. If additional features or services are requested, this will

require a Change Order or a new SOW. That includes, but is not limited to the following out of scope items:

- Custom Reporting such as:
  - Custom Reporting in Data Explorer
  - DataMart Integration
  - SSRS
- Custom third (3rd) Party application integration
- Agent desktop integration or installation
- Third (3rd) party integration of custom metadata
- API configuration
- Cisco WebEx Contact Center Project Assumptions
  - Cisco WebEx Contact Center QM Recording Specific
    - Cisco WebEx Contact Center captures calls that are then uploaded to the Calabrio Quality Management System. All calls are treated as inbound calls.
    - Initial recording decisions are based on the configurations in the Cisco WebEx Contact Center environment.
    - Some Calabrio QM functionality will not be available with this integration, including:
      - Live Monitoring
      - Recording Controls
- Training Center Refund Policy:
  - Customers can reschedule or cancel their participation in onsite Product Training up to two (2) weeks prior to the session without penalty\*. Product Training participation cancelled or rescheduled less than two (2) weeks prior to the session is subject to a 10% rescheduling/cancellation charge (minimum charge of one credit). Online Training sessions can be rescheduled at any time without penalty.
  - \*Travel penalties and/or change fees incurred by Calabrio as a result of rescheduled or cancelled onsite training are the responsibility of the customer.
- Training Center Cancellation Policy
  - Calabrio strives to ensure Training Center offerings take place as scheduled. Although we have never outright cancelled a session against participant wishes, we do have a policy in place should circumstances dictate that we do:
  - We strive to provide a 2-week notice prior to any cancellation
  - Should a cancellation be necessary, we will provide a full 100% refund of the credits used to purchase the session, plus an additional 10% credit bonus (minimum bonus of one credit)
  - Calabrio will not provide compensation for any external costs of cancellation such as hotels or flights.
  - The Training Center Cancellation Policy does not apply to Training Online. Cancelled Training Online sessions will simply be refunded or rescheduled. No bonus credits will be provided.

## g. Customer Information Questionnaire (CIQ)

### Core Information

Primary Contact Integration Vendor	Cisco
ACD Type	Cisco WebEx CC
PBX vendor	Cisco WebEx CC
Current Calabrio Products?	None
Method for user authentication?	Manage users and their passwords within Calabrio (Premise or Cloud)
Default User Interface Language	English (United States)

### Recording

Group name		City of Georgetown
Group Server Location		Georgetown, TX
Recording calls within the European Union or United Kingdom?	no	no
Recorded Users: QM	10	10
Recorded Users: Total	10	10
Total Named Licensed Users	10	10
Max % Concurrent Recording	90%	90%
Maximum Concurrent Recordings	9	9
Number of unique devices (phones) to be recorded	10	10
Recorded user to phone association		Static. Users map to their device (phone)
Implementation details		Mapping table configured within Calabrio
Remote or at home, recorded users?	no	CCaaS Cloud Partner
Record agent to agent internal calls?	yes	yes
Live audio monitoring required? (requires QM)	yes	yes
Max % Concurrent Live Monitoring	5%	5%
Maximum Concurrent Live Monitoring	1	1
Audio recording of calls		yes
Average recorded calls per day per user		30
Average call time in seconds		360

Audio recorded calls per day	300	300
Recorded audio upload Mbytes/day	828	828
Total months to retain audio recordings	3.00	3.00
Short Term Storage (STS) Audio format		Low Comp, wav8, stereo
Months saved in initial audio format in STS	2	2
Storage GB for Audio initial format in STS	36	36
Long Term Storage (LTS) Audio format	No Change	Low Comp, wav8, stereo
Months saved in secondary audio format in LTS	1.0	1.00
Storage GB for Audio secondary format in LTS	18	18
Total Storage GB for Audio recordings	53	53
Selective Screen Recording?	yes	yes
% of calls for screen recording?		100%
Average selected calls per day per user		30
Include screen recording	yes	yes
Seconds of after call screen recording		30
Avg number of screens per user		2
Recorded screen minutes per day	1,950	1,950
Recorded screen upload per day MB	5,850	5,850
Total Months to keep screen recordings	3	3.00
Months Screen saved in Short Term Storage (STS)	2	2
Storage GB for Screen in STS	251	251
Months Screen saved in Long Term Storage (LTS)	1.00	1.00
Storage GB for Screen in LTS	126	126
Total Storage GB for selective screen recordings	377	377
Total recording Mbytes data upload per day	6,678	6,678
Total Short-Term Storage (STS) GB	287	287
Total Long-Term Storage (LTS) GB	143	143
Total Recording Storage GB	430	430
Are recording users on a VDI (Thin Client)?	no	no
If SIPREC Gateway at location, select Vendor, Model,	none	No Gateway for SIPREC
Do you use an outbound dialer?	no	no

<b>Selected recording architecture</b>		CaaS import
<b>If desktop recording, staging upload server to consolidate uploads?</b>		no
<b>Smart Desktop Recorded Users</b>	10	10
<b>Recording group requires CTI?</b>		no
<b>Recorded devices covered by CTI</b>	0	0
<b>Recording group shares first CTI?</b>		yes
<b>Recorded devices for this CTI</b>	0	0
<b>Gateway Recorded users</b>	0	0
<b>Reconciliation calls/day</b>	0	0
<b>Max Concurrent Server recordings</b>	0	0
<b>Imported calls/day</b>	0	0
<b>Total Contacts / day</b>	300	300
<b>Group name</b>		City of Georgetown
<b>Group Server Location</b>		Georgetown, TX
<b>Recording calls within the European Union or United Kingdom?</b>	no	no
<b>Recorded Users: QM</b>	10	10
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<b>Maximum Concurrent Recordings</b>	9	9
<b>Number of unique devices (phones) to be recorded</b>	10	10
<b>Recorded user to phone association</b>		Static. Users map to their device (phone)
<b>Implementation details</b>		Mapping table configured within Calabrio
<b>Remote or at home, recorded users?</b>	no	CaaS Cloud Partner
<b>Record agent to agent internal calls?</b>	yes	yes
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<b>Max % Concurrent Live Monitoring</b>	5%	5%
<b>Maximum Concurrent Live Monitoring</b>	1	1
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<b>Recording group requires CTI?</b>		no
<b>Recorded devices covered by CTI</b>	0	0
<b>Recording group shares first CTI?</b>		yes
<b>Recorded devices for this CTI</b>	0	0
<b>Gateway Recorded users</b>	0	0
<b>Reconciliation calls/day</b>	0	0
<b>Max Concurrent Server recordings</b>	0	0
<b>Imported calls/day</b>	0	0
<b>Total Contacts / day</b>	300	300

### Recording Pro Services

<b>Is deployment dependent upon other customer event or actions?</b>	no
<b>Will recording need to be paused for sensitive information (PCI)?</b>	no
<b>Need to add custom metadata to recordings?</b>	no
<b>Import calls from an existing non-Calabrio recording system?</b>	no
<b>Advanced Bulk Contact Export included in this system?</b>	no
<b>Any other miscellaneous professional service requirements?</b>	no

## Calabrio Solution Diagram

