STATEMENT OF WORK
Small Enterprise

SCOPE OF SERVICES AND DELIVERABLES

Timeline and Delivery

Upon completion of the Client portal and configuration set up tasks, Cornerstone will distribute all access credentials to the Client, which indicates the Client Portal systems are ready for use. Acceptance of these deliverables will be in accordance with the Agreement. Upon completion of the Client Portal and Configuration Set Up phase, the Software is ready for use by Client.

PROJECT RESOURCES

The table below outlines recommended resources and time estimates for each phase. Time durations are estimates and may vary based on client requirement. Each phase may overlap and may require a shifting of hours among phases based on Client's processes. The project lifecycle may be repeated for each additional module.

Phase	Estimated Duration	Cornerstone Resources	Client Resources
Initiate	3 Weeks	• Implementation Consultant	• Project Manager • Business Process Owners • System Administrators
Design	4 Weeks	• Implementation Consultant • Integration Consultant	• Project Manager • Business Process Owners • Technical Resources • System Administrators
Deliver	3 Weeks	• Implementation Consultant • Integration Consultant • Client Success Manager	• Project Manager • Business Process Owners • System Administrators • Technical Resources

IMPLEMENTATION SERVICES AND ESTIMATED TIMELINE

The Scope of Services outlined below provides a breakdown of the key components of the Implementation Services and the corresponding deliverables to be provided by Cornerstone and Client.

Phase	Cornerstone Deliverables	Client Deliverables
Initiate	**Weeks One through Three** • Training Plan developed and delivered to client • Project initiation call with client. Confirm project scope with client project team • Create meeting schedule for project lifecycle • Establish and document project controls and processes for status reporting, issue resolution, and risk management processes • Schedule kickoff meeting to review client design decision points • Communicate requirement to complete Organizational Units, Security preferences and training • Complete remote kick-off meeting • Review technical projects in-scope • Send discovery questionnaire to client • Collect client process documentation. • Deliver the Project Plan to the client • Conduct technical kickoff call with client • Implementation Consultant schedules and leads Organizational Unit Workshop • Deliver discovery document and technical projects questionnaires • Schedule and lead technical kickoff calls when applicable or direct client to recorded technical workshops • Review client documentation • Deliver technical documentation (data design documents and templates) • Collect any client process documentation the client can provide • Create project plan for implementation services • Implementation Consultant updates implementation discovery documentation • Complete options for webcast training session with client	**Weeks One through Three** • Client begins training of Cornerstone OnDemand prescriptive training plan • Participates in remote kick-off meeting • Confirm project plan and meeting schedule • Assemble project team • Define measures of project success • Complete initial administrator training, pre-work, and discovery questionnaires • Attend technical project kickoff calls • Complete discovery questionnaires • Confirm project plan and meeting schedule • Provide branding and marketing requirements • Provide organization chart(s) to assist in designing Organization Unit structure • Provides sample user profile record and definition • Client content provider listing and courses • Deliver documented learning processes including approvals, evaluations, process maps and supporting forms or documentation • Provide external user approval workflows • Provide external training requirements • Provide use case scenarios to model recommended configuration

Design	**Weeks Four through Seven:**
	• Document decisions and remaining action items for :
	  ○ Organizational unit and user data design
	  ○ Global system preferences
	  ○ Welcome Page configuration
	  ○ Learning management preferences
	  ○ Navigation tabs and links
	  ○ Custom security roles matrix
	  ○ Email management matrix
	• Documented technical projects:
	  ○ Historical Data Upload(s)
	  ○ Master Data Upload(s)
	• Complete decisions needed to document the configuration workbook
	• Technical follow up meeting (Remote)
		Weeks Four through Seven:
		• Complete configuration, documenting decisions for the following:
		  ○ Global system preferences
		  ○ Welcome Page configuration
		  ○ Learning management preferences
		  ○ Navigation tabs and links
		  ○ Custom security roles matrix
		  ○ Email management matrix update
		• Complete design specifications for technical projects:
		  ○ Historical Data Upload(s)
		  ○ Master Data Upload(s)
		• Complete remaining configuration decisions post configuration workshop and document remaining design specifications

Phase	Cornerstone Deliverables	Client Deliverables
	• Cornerstone will configure pilot portal based on client requirements presented in discovery questionnaire • Conduct remote follow-up design sessions with client for remaining configuration decisions • Discuss User Acceptance Testing including test scripts and participants • Change management discussion or workshop if purchased	• Attend remote follow-up design sessions • Review and accept Cornerstone deliverables • Complete and implement technical projects

Deliver	**Week Eight:**
	• Complete technical projects:
	  ○ Historical Data Upload(s)
	  ○ Master Data Upload(s)
	  ○ Web Services Design
	  ○ Unit test system interfaces
	• Conduct technical follow up meeting
	• Wrap follow up configuration session(s)
	• Conduct User Acceptance Testing prep meeting (remote)
	
	Week Nine:
	• Schedule daily User Acceptance Testing touch base to solution review open issues with client (include Client Success Manager)
	• Solidify configuration with client in preparation for User Acceptance Testing in pilot
	• Ensure Historic Data Load has gone through initial validation in pilot
	• Copy pilot to stage if you need to preserve Historic Data Load or other configuration through week 10 for validation
	• Inbound Data Feed configured in Live portal. Inbound Data Feed will be validated
	
	Week Ten:
	• Daily User Acceptance Testing touch base to review open testing issues with client (include Client Success Manager)
	• Complete Client Success Manager handoff documentation and submit request for Client Success Manager
	• Technical Projects
	• Copy down executed to pilot (If necessary can do copy over from pilot to stage prior to Live Copy Down)
	• Obtain named care admins from client
	• Update issue log, including defects
	• Provide coaching for configuration updates
	• Schedule Client Success Manager Transition Call
	• Ongoing Historical Data Load validation (stage) and load into production
	• Triage (categorize and prioritize) reported issues and address prior to go-live
	• Finalize integration projects in production
	• Support Client during testing and validation
	• SOW Review with Client Success Manager
		Week Eight:
		• Attend follow-up configuration session(s)
		• Attend User Acceptance Testing prep meetings
		• Complete setup in live portal including:
		  ○ Global Configurations – emails triggers, security roles, welcome page, preferences
		  ○ Language translations, as necessary
		  ○ Configuration of additional client security roles
		• Learning Module
		  ○ Load eLearning course content and materials
		  ○ Load all required documents including curriculums, test and evaluations, Instructor Led Training events and sessions, instructors, facilities, and certifications
		  ○ Test content launching, tracking, and completion
		
		Week Nine:
		• Attend all User Acceptance Testing calls
		• Review UAT feedback with Implementation team
		• Make corrections or configuration changes based on UAT findings in Live portal
		
		Week Ten:
		• Test system interfaces end-to-end
		• Review and accept Cornerstone deliverables
		  ○ Historical Data Upload(s)
		  ○ Master Data Upload(s)
		  ○ Web Services Design
		• Populate specific test data like tasks and users
		• Create and complete client-specific test assessment template
		• Create and complete user acceptance test scripts
		• Attend Client Success Manager transition meeting
		• Client makes configuration adjustments on Pilot and Live portals
		• Update Live portal configuration based on testing feedback
		• Post Live issue remediation (partner with Client Success Manager to assist)
		• Client Go-Live

Phase	Cornerstone Deliverables	Client Deliverables
	- Close out any open issues/items for Go Live - Client Go-Live - Discuss post live survey with client - Schedule and execute final Historical Data Loads - Conduct project close out	

TECHNICAL PROJECTS AND EDUCATIONAL SERVICES SCOPE

Welcome Page—Template Design Package

Brief Summary

One Welcome page will be created and set up in the clients portal within the following parameters and scope:

- Choice of one of the standard template designs
- Choice of color
- Client logo, graphic and text for template – client may provide one graphic or select from stock photo site graphics
- Choice of predesigned widget boxes
- Choice of standard button styles
- Choice of standard button icons
- All needed work to create the Welcome page including HTML coding for links will be completed by CSOD. Links must exist in client portal to enable linking from Welcome Page.

There is one initial consulting session with client to determine choices and layout and one client review cycle of the Welcome Page after the initial mock-up is presented. Client will be able to review and confirm changes were made appropriately. CSOD will create the page in the client's test portal or test division. Client will be able to review the page once it is created in the portal for the second review cycle and confirm changes were made appropriately. Additional review cycles or updates to the Welcome Page at a later time may incur additional cost.

The project will begin (kickoff date) when the client's live portal is fully configured related to functionality for the Welcome Page and delivered within 10 business days assuming a 2 day client review cycle. If client requires additional review time or multiple reviews, deliverable date will be based on the additional review time required. Maximum time for entire project cycle is 30 business days from project start date (kickoff date) and Cornerstone reserves the right to request final approval on design, code page in clients portal of choice and close project 30 business days after project start date.

Client will provide CSOD a system admin ID in their live or pilot portal to create the Welcome Page and will provide a single point of contact for questions related to the specifics to be used in the Welcome Page and for signoff for the review cycle.

NOTE – Any stock photos, buttons or other graphics used for the Welcome Page can be used only for use within this specific Welcome page and may not be reutilized or redistributed in any other manner..

Historical Data Load – Learning (HDLL)

Brief Summary

Migration of learning system data from legacy system to the Cornerstone portal. Migrated data includes the following data types:

- User transcript-centric records and supporting SCORM/AICC e-learning, event / session, external training, materials, curriculum (transcript only)

Tasks

- Cornerstone: Provide Client with the Cornerstone standard data design document template
- Cornerstone: Lead Client in data loading workshops to review data load process and support the functional decisions of Client
- Cornerstone: Create data design document for Client
- Client: Sign off on data design document
- Client: Prepare files per approved data design template provided by Cornerstone
- Cornerstone: Load files into the pilot portal system
- Client: Review and correct any errors detected in the data load process
- Cornerstone: Reload corrected files as necessary in pilot portal (up to three (3) iterations per data type)
- Client: Review and approve data loaded to pilot portal
- Cornerstone: Load data on live portal

Assumptions

- Utilizes Cornerstone data design template
- All data loads referencing user data does so by a common unique identifier
- Client is responsible for providing unique records per data type
- Client has the ability to transform data to the format(s) defined by the Cornerstone data design template
- Client has skilled software resources that can extract master data from source systems

Historical Data Load – Learning (HDLL)

- Client will perform all data file consolidations by data type defined above
- Maximum of three (3) iterations of loads by data type for the purpose of correcting errors

Master Data Load – Learning (MDLL)

Brief Summary

Migration of master system data to the Cornerstone portal. Migrated data includes the following data types:

- E-learning courses in SCORM or AICC format only:up to a maximum of 1,000 courses
- Materials (documents including .pdf, .docx, .xlsx,.pptx; other assets including .bmp, .jpg,.gif, .m4a, .mp3, .wma, .wav, .mid, .avi, .mpeg, .m4v, .swf; or URLs), including up to a maximum of 1,000 materials
- Videos as learning objects (.mpg, .mpeg, .wmv, .flv, .mp4, .m4v format or URL from YouTube), including up to a maximum of 1,000 videos
- Questions and exams, including up to a maximum of 1,000 questions and up to a maximum of 300 exams

Tasks

- Cornerstone: Provide Client with the Cornerstone standard data design document template
- Cornerstone: Lead Client in data loading workshops to review data load process and support the functional decisions of Client
- Cornerstone: Create data design document for Client
- Client: Sign off on data design document
- Client: Prepare files for loading by Cornerstone integration consultant
- Cornerstone: Load files into the pilot portal system
- Client: Review and correct any errors detected in the upload process
- Cornerstone: Reload corrected files as necessary in pilot portal (maximum of three (3) iterations per data type)
- Client: Review and approve data loaded to pilot portal
- Cornerstone: Load data on live portal

Assumptions

- Utilize Cornerstone standard data design document template for all data types
- E-learning courses are published in the SCORM 1.2, v2004, or AICC 3.5 format standards only
- All data records referencing user data does so by user's unique identifier value (UserID)
- Client is responsible for uniquely identifying records across all data types
- Client has skilled software resources that can extract master data from source systems
- Client has the ability to transform data to the format(s) defined by Client-approved data design document
- Client will perform all data file consolidations necessary by data type defined above
- Maximum of three (3) iterations of loads by data type for the purposes of correcting errors

Managed Services – Outsourced Administration (OA) – Client-side Configuration Consultant

Brief Summary

In general, the OA will be directed by the Client and will perform some (not all) of the Client-owned tasks and deliverables listed in the Configuration Support Services Section of an Additional Configuration Support Services SOW during Implementation. After Go-Live, (if allocated for hours / weeks beyond the Client's initial Go-Live date) the OA will perform general administration of the Cornerstone Integrated Talent Management system as directed by the client.

Responsibilities

- Review and confirm all project tasks, deadlines and project milestones in order to meet critical due dates
- Participate in co-configuration sessions with Cornerstone and document decisions in Configuration Workbook
- Define individual timelines and how to accomplish each phase
- Provide weekly (and ad hoc as needed) work direction and calibration with Build Team leaders and Project Managers
- Ongoing assessment of work and recommendations as each portion is accomplished
- Set-up, pilot and test tasks for Client Management review
- Participate on testing team
- Provide trouble shooting and hands-on help when needed
- Participate in the review / validation of system configuration, provide feedback and complete adjustments
- Provide expertise and best practices related to build process, implementation and standard operating procedures
- Set-up / Administer :
  - Global Configurations – emails triggers, security roles, welcome page, language translations, as necessary

Managed Services – Outsourced Administration (OA) – Client-side Configuration Consultant

- o Cloud Configuration Support (to be determined during Project Kick Off Phase) - Preferences, Templates, Tasks, Dashboards, Reports
- Serve as a Client Administrator

Assumptions

- Outsourced Administration is a remote function, as such will be delivered remotely, unless otherwise specified in writing by Cornerstone and Client. All travel related expenses for on-site activities are the responsibility of the client.
- 10% of hours may rollover from one week into the next week. Rollover hours can only be used in the following week
- Overtime hours (i.e., in excess of eight (8) hours per day or forty (40) hours per week) will be billed at a rate mutually agreed upon between Client and OA.
- All time shall be tracked by OA and reported to Client monthly. The total work effort may not exceed the total number of hours purchased above.
- OA shall not be required to work more than ten (10) hours per day or on any weekends or national holidays unless mutually agreed upon between Client and OA.
- Cornerstone will not be responsible for any computers, emails accounts, or any other Client materials issued to the OA by Client for use by the OA while performing services hereunder.

General Project Assumptions

Client Administrator Responsibilities

Client Administrators ("CAs") are designated by the client to administer the Cornerstone solution within the constraints set by the business and managed through Security Roles, Permissions and Constraints. The Client shall establish an internal protocol and procedure for identifying, training, supporting and managing CAs. CAs shall be trained and certified by the client (or by Cornerstone as a chargeable service at the request of the client) in order to perform their administrative duties. The following are the CAs key responsibilities:

- Perform administrative activities in support of the client's business processes that are enabled by the Cornerstone solution
- Participate in the release management process, including User Acceptance Testing, to ensure understanding of new functionality being introduced into the solution
- Communicate key information regarding the Cornerstone solution (e.g., planned downtime, release information, etc.) to the appropriate stakeholders within the client's business according to the standard operating procedures defined by the client
- Leverage knowledge assets available to support the effective use of the solution such as online help, the Cornerstone Client Success Center, etc.
- Request support by assisting with Cases as required from the Cornerstone Global Customer Care team; complete the required process prior to submitting and provide accurate and complete information in the submission; Provide additional information as requested by Cornerstone in a timely manner
- Confirm that any defects reported by the client and planned to be included in the release are validated and the respective case(s) are closed
- Any changes following Client signoff will require a Work Order or SOW submission

TIMELINE, DELIVERY, AND COST

The Implementation Services set forth and described in this Statement of Work will take approximately 10 weeks in duration to complete. The Services will be performed remotely by Cornerstone, except for any on-site Services so expressly identified herein.

The Services will be performed for the below flat fee(s), plus reimbursement of pre-approved travel expenses for on-site activities.
Changes to the scope of this Statement of Work and/or Client delays will require a change order, and may result in additional expense.

Project Components		Investments
Implementation Services		
Learning Implementation - Small Enterprise	SVCSIMP0120	included
Consulting Services - Administrative Outsourcing	SVCSIMP0004	included
Technical Services		
Learning Historical Data Load (LHDL)	SVCSTEC0101	included
Master Data Load - Learning (MDLL)	SVCSTEC0009	included
Welcome Page Template Design Package	SVCSTEC0027	included
Total Service Investment		**$35,000.00**

The end of the Implementation Services is defined as the completion of the above Cornerstone deliverables as outlined under the Implementation Services section of this document. Acceptance of the deliverables will be in accordance with the Agreement.

ASSUMPTIONS AND CLIENT OBLIGATIONS

In order for Cornerstone to provide the Services outlined in this Statement of Work, Client shall provide the necessary resources to fulfill the obligations listed below:

- **Project Specific**
- Select and assign knowledgeable, empowered Implementation team including the following roles, which may overlap:
  - Business Process Owner for Learning Management System (aka, the Decision Maker)
  - Lead Cornerstone System Administrator
  - Project Manager of the Cornerstone implementation
  - HRIS Technical Administrator (Optional, depending on data requirements and extraction capabilities)
  - Executive Stakeholder (Optional)
- Begin going through kick-off documentation in the Client Success Center
- Empower team to make real-time decisions regarding configuration and business process functions during the project.
- Ensure project team attendance and active participation during all phases of the Implementation project.
- Formally accept (sign-off) all key deliverables and implementation services per the Agreement.
- Manage Client project staffing and milestones through Cornerstone provided work plan, and ensure completion of Client project deliverables.
- Attend and participate in configuration workbook overview, implementation coaching, and administrator training sessions.
- Provide a primary point of contact for Cornerstone during and after the implementation.
- Ensure proper change management communication to end-users during implementation in preparation for rollout.
- The project will be conducted remotely
- Cornerstone and Client agree that changes to key members of implementation team or significant changes in business requirements or decisions, in each case by Client, that cause delays in the project timeline may require a change order to this Statement of Work documenting such changes and the pricing impact, if any, to the original project scope..
- Client is solely responsible for testing all processes during the UAT phase
- Client will utilize the Cornerstone course publisher to upload online content to the portal. All Client content is SCORM v1.2 or AICC v3.5 compliant
- Client is solely responsible for testing (Tracking, Completion, etc.) all content loaded to the Cornerstone portal.
- Any technical integration or service, historical data load, master data load, or data migration not expressly listed in this Statement of Work with an accompanying price will be scoped as a separate work effort and is not included in the scope of this document.

- Requests for application code changes are out of scope
- Retire Client pilot portal within 60 days after implementation; stage and live portals to remain for the term
- Additional contracts may be required to utilize third party (non Cornerstone OnDemand, Inc.) services and integrations such as job board aggregation, video interview, background screening, employee eligibility and citizenship.
- Except where otherwise stated or agreed by the parties, Cornerstone's obligation to perform the Services set forth herein expires at the earlier of: (i) acceptance of the Service by Client; (ii) Twelve months from the purchase date.