



## **PREPARED FOR**

Lewis County ("Subscriber")

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## **PREPARED BY**

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## **PUBLISHED ON**



Q-335975

Lewis County's Sourcewell Contract: ID# 4969 <https://www.sourcewell-mn.gov/node/1513661>  
(<https://www.sourcewell-mn.gov/node/1513661>)

Sourcewell/NJPA purchasing contract

- <https://www.sourcewell-mn.gov/cooperative-purchasing/090320-sdi#tab-contract-documents> (<https://www.sourcewell-mn.gov/cooperative-purchasing/090320-sdi#tab-contract-documents>).
- Contract #090320-SDI
- Expiration date: 11/2/2024

Term: 39 months (06/01/2023 - 08/31/2026)

| Services  |            |           |                             |               |
|---|------------|-----------|-----------------------------|---------------|
| Item  | Start Date | End Date  | Pricing Based On            | Investment    |
| - Facilities/Physical Plant Module  | 6/1/2023   | 8/31/2023 |                             | Included      |
| Asset Essentials Enterprise   | 6/1/2023   | 8/31/2023 | 490,000.00 Sq. Ft.          | 4,634.14 USD  |
| - Asset Essentials Inventory  | 6/1/2023   | 8/31/2023 |                             | Included      |
| - AE Safety   | 6/1/2023   | 8/31/2023 |                             | Included      |
| - Dude Analytics  | 6/1/2023   | 8/31/2023 |                             | Included      |
| 3.0 Month(s) included at no additional cost on the first term 06/01/2023 - 08/29/2023 |            |           |                             | -4,533.40 USD |
|   |            |           | <b>Subtotal: 100.74 USD</b> |               |



| Professional Services                                      |                    |                                |
|--|--------------------|--------------------------------|
| Item   | Pricing Based On   | Investment                     |
| Asset Essentials Enterprise Implementation with Consulting | 490,000.00 Sq. Ft. | 12,310.10 USD                  |
| Consulting Service   | 5.00 Day(s)        | 7,234.25 USD                   |
|  |                    | <b>Subtotal:</b> 19,544.35 USD |
| <b>Total Initial Investment</b>                            |                    | <b>19,645.09 USD</b>           |



| Subscription                          |   |   |   |
|---------------------------------------|---|---|---|
| Item                                  | Investment Year 2<br>Start Date: 09/01/<br>2023 | Investment Year 3<br>Start Date: 09/01/<br>2024 | Investment Year 4<br>Start Date: 09/01/<br>2025 |
| - Facilities/Physical<br>Plant Module | Included  | Included  | Included  |
| Asset Essentials<br>Enterprise        | 18,536.56 USD                                   | 19,278.02 USD                                   | 20,049.14 USD                                   |
| - Asset Essentials<br>Inventory       | Included  | Included  | Included  |
| - AE Safety                           | Included  | Included  | Included  |
| - Dude Analytics                      | Included  | Included  | Included  |
| Total:                                | 18,536.56 USD                                   | 19,278.02 USD                                   | 20,049.14 USD                                   |



# Asset Essentials – Assets and PM Schedules Implementation Consulting Package

## Statement of Work

### Purpose

Brightly's (Company) Asset Essentials is designed to provide our clients with focused guidance by experienced consultants to ensure an effective and efficient implementation and a faster ROI. This includes - meeting with key stakeholders to ensure the set-up and configuration of the system will meet the client's current and future needs; location and category hierarchies are configured appropriately; workflows meet the needs of the business; available data is cleaned, aligned, and imported; and end users are trained and ready for go-live.

### Value

By partnering with Brightly, you are provided expert guidance in the best practice configuration and usage of Asset Essentials. The following are ways in which this value is realized:

- Faster time to value: clients who leverage our focused consulting services see implementation time frames that are up to four times faster than clients who do not utilize our services.
- Expert data management: we work with client data every day and provide guidance on creating good data for reporting. In partnership, we will help clean up and import data for you, allowing you more time to focus on your daily operations, and not the one-time activities necessary to get your account configured effectively.
- Dedicated professional services: the partnership between you and your consultant will align Asset Essentials best practices, configuration, and workflows to best meet your business needs. Our team will bring their thousands of hours of expertise to the table, helping ensure a smooth transition to your new CMMS system.

### Deliverables

- Project kick-off call with a Company Project Coordinator
- Determine specific maintenance related goals and objectives to drive the most effective Asset Essentials configuration to meet the client's current and future needs
- Determine and set-up appropriate workflows and drop-down lists
- Review, cleanse and import available user, location, asset, and scheduled PM data
- Assets, PMs, and Corrective Work Order Processes
- Training for Admins, Leads and Full Users
- Go-Live Support for additional assistance during roll-out
- Unlimited access to Help Site, Virtual Classroom Trainings, and Best Practice webinars – during and after implementation

### Methodology and Approach

Brightly or a qualified Service Provider (Company Service Provider) will interview your key maintenance stakeholders to determine account configurations and settings. With over 12,000 clients successfully using our software, we understand the importance of understanding your goals, objectives, and current workflows, as



well as the importance of getting to know your users. Your professional services implementation will begin with an Orientation Call with a dedicated Project Coordinator. Additional resources will help prepare you for your consulting time through access to a project collaboration tool (Financial Force Community) where a team of implementation specialists will help answer questions and provide access and recommendations for Virtual Classroom Training sessions. Once your data has been collected you will be ready to work with your assigned consultant to understand your workflow, cleanse and import your data, configure your account, and offer user-role based software training sessions.

Below are topics that will be discussed with your Company Service Provider:

- The primary reasons your organization began a CMMS search
- The ideal timeline for completion
- Business deadlines that drive this timeline
- Project team members who will be participating in the implementation, and their roles
- Internal champions for this project
- Sceptics that may require additional change management support
- Issues, barriers, or roadblocks that your organization experienced with previous software implementations
- Resolution of those issues for this implementation/conversion
- Aspects of AE planned for immediate use
- Aspects of AE planned for future use
- Aspects of AE planned not to be used

|                                  | Immediate use | Future use | Not planned |
|----------------------------------|---------------|------------|-------------|
| Mobile App                       |               |            |             |
| Cost Centers/Budgets             |               |            |             |
| Connector Tool Integration       |               |            |             |
| Projects                         |               |            |             |
| Parts and POs                    |               |            |             |
| Capital Forecast/Predictor Core  |               |            |             |
| Citizen Portal                   |               |            |             |
| Mobile profiles                  |               |            |             |
| PM scheduling and best practices |               |            |             |
| AE Reporting                     |               |            |             |

## Goals and Reporting



- Reports/information needed from Asset Essentials for who and how often
- Key maintenance metrics
- Overall goals of your maintenance department
- Goals/needs from Asset Essentials CMMS
- Measures of success for this implementation

### **Users**

- Users who will use Asset Essentials
- Roles for each user
- Responsibilities of each role including unique responsibilities within common roles
- Permissions per role
- Requester access, usage, and approval
- Specialized user needs
- Departments

### **Facilities**

- Multiple site(s)
- Facility layout –
  - Parent-child Locations for Buildings and Rooms
  - Identifying Building-type Locations
  - Management/supervisory responsibilities by functional area
  - Similarities/differences between facilities

### **Assets**

- Asset life cycle process within your operation
- Major types/categories of equipment
- Asset Parent-child relationships
- Meters used
- Key reporting needed to drive effective asset management

### **Maintenance Operations**

- Maintenance department org chart/hierarchy
- Techs specialized or general or both
- Tech service areas (if applicable)
- Departments other than maintenance involved in Asset Essentials -
  - What departments
  - Type of involvement
  - Contractors

### **Workflow**

- WO workflow processes –
- Requests/Corrective WO's
  - Determining factors for who gets assigned each corrective or PM WO
    - Examples include Location, Work Category, Type, Status, Priority, etc.



- Steps in the process -
  - Requester process
  - Approval process, if required
  - Assignment Process
  - Completion requirements
  - Mobile app usage
- PM's
  - Assigned from PM to an individual or flow through a planner/supervisor
  - Asset Essentials creates Location or Asset-based PMs
  - Tasks Library
  - Scheduling cycles and stacking groups
- Overall WO management
  - Prioritization
  - Daily/Weekly needs
  - Cost Tracking
  - Building Views
  - WO Reporting

### **Go Live Support**

- Begin using AE as your primary CMMS
- Provide internal support for basic usability questions
- Up to 4 weekly follow up sessions with your Implementation Specialist to review progress with rollout and user adoption.

### **Implementation Complete!**

- Project Close
- Begin working with Company's Legendary Support Team (LST) for ongoing user questions

### **Sample consulting engagement**

Our primary goal is to assist your team in their transition to a new solution. Through our interviews with key staff, we will identify your objectives to focus on during our stay. Below you'll find an example schedule of a typical consulting engagement. Time invested into each phase varies based on client need.

#### **Discovery Phase**

*The discovery phase is typically a phone or web interview that typically lasts a couple of hours*

- Interview maintenance and operations managers/supervisors, technicians, operators
- Overview of application with key stakeholders
- Define workflow and use-cases within the applications
- Discuss change management and strategy

#### **Data Loading and Configuration**

*Preparing Data is a key component of the service and requires client input, but the consultant will take care of the rest!*





- Data review of existing data from previous CMMS system or data sets
- Map current data into AE setup and format
- Determine priority of data load to meet use-cases
- Review data in AE and discuss data management

### **Use-case setup and PM training**

*Setup workflow to meet use-cases and begin PM training*

- Refinements to configuration, workflow and data as needed
- Build workflow to meet agreed use-cases
- Refine Request/Work Order templates to capture required data
- Training on creating and maintaining PMs with application Admins and Supervisors

### **Hands-on User Training**

*User training sessions by user role or function and typically last up to 90 minutes for up to 10-15 users*

- Train end users – supervisors, technicians, and requestors
- Hands on training of reactive workflow with Supervisors
- Mobile or Desktop training available for most user roles

### **Evaluation**

At the conclusion of the consulting service, the consultant will forward notes to your project coordinator capturing what was accomplished and any recommended next steps. The project coordinator will schedule a follow-up call within 2 weeks of the consulting service. Ongoing communication until the project is complete will be through your Financial Force Community project.

### **Post Enablement Support**

After data is loaded, the account configured, and users are trained the system is ready to roll-out

- Support go-live – adjust configuration, provide additional training and data entry support
- Review aspects of AE planned for future use
- Define follow-up tasks and next steps
- Define Post Launch Support point of contact

### **Project Assumptions**

Company has made the following general assumptions in this SOW to derive the estimated cost for this project. It is the responsibility of Client to validate these assumptions and responsibilities before signing the Acceptance. Deviations from these assumptions may impact Company's ability to successfully complete the project. Any changes in scope, schedule, or costs will be documented by the Project Coordinator, whether there is a cost impact or not.

- Company is not responsible for delays caused by missing data or other configuration information that is required to be available prior to the consulting service. Having the requested data and configuration information available prior to the consulting service may minimize delays so progress can be made quickly.

### **Client Assumptions**

- Configuration and data options may vary based on the version of Asset Essentials and the



corresponding service level that was purchased.

- Client IT department is responsible for ensuring access to mobile devices, internet connections, email access and web link access to the application(s)
- The client will schedule time for the appropriate resources to be available to the consultant for all scheduled consulting activity. The success of this process is dependent on the attendance and full engagement of the key stakeholders. The client will also provide a dedicated room or area with adequate technology for a successful consulting service, including but not limited to monitor/projector, computers/tablets, quality phone connection, and wireless internet access.
- All key stakeholders who will take part in the goals and objectives and data portions of the consulting service have attended the recommended virtual classroom trainings prior to the service.
- Prior to the consulting service, the client will provide data for each record type in Excel or CSV format in one file and one sheet with one record and its associated information per row.
- If there is no existing Asset data, the consultant will guide the client to focus on safety and location-based PMs and inspections.
- Rescheduling or cancellation of the service within 2 weeks of the scheduled delivery date will result in a \$500 rescheduling fee.



# Virtual Consulting Services - Statement of Work

## Purpose

Brightly's (Company) virtual consulting service is designed to provide our clients with focused guidance by experienced consultants to ensure an effective and efficient deliverables to aid their utilization and achieve a faster ROI. This may include meeting with key stakeholders to ensure the set-up and configuration of the system will meet the client's current and future needs; workflows meet the needs of the business; available data is cleaned, aligned and imported; and end users are trained and ready for go-live.

## Value

By partnering with Brightly, you are provided expert guidance in the best practice configuration and usage of your Brightly applications. You will experience faster time to value. Focused virtual consulting services allow a client to focus on their day to day operations and let us take on the burden of one-time tasks related to data, configuration and training. Our team will bring their thousands of hours of expertise to the table, helping ensure a smooth transition to their new Brightly application or adoption of new functionality.

## Deliverables

The following list is of categories of outcomes that can be achieved through. The specific deliverables included in your service will be documented and presented to you by your Project Coordinator. If additional services are requested, a new Consulting Services SOW may be required. Virtual services are delivered in a minimum of 2 hour increments, or until the desired outcome is reached.

### Discovery:

- Virtual Interviews and requirements gathering of current process and desired outcomes. Virtual sessions to review desired outcomes and change management process around configured data, categorizations, end-user provided values and reporting needs.

### Data Loading and Account Configuration:

- Data Loading of Pick List values or primary record data (e.g. work orders, events, PM schedules) in your applications. Reviewing, removing duplicates, making recommendations for best alignment of data categories and aligning with Company Import templates for inclusion in your solution.

### User Training:

- Administrator and/or Role based user training to include functions associated to specific role permissions. Including maintaining current data in your account, basic or advanced workflow function and non-administrators' recurring activity regarding creation and processing of records.

\*\* Service outcomes may be dependent on the version of the solution the client owns. Verify that your desired outcomes can be achieved with your current application subscription.

## Evaluation



At the conclusion of the service, the consultant will forward notes to your project coordinator capturing what was accomplished and any recommended next steps. The project coordinator will schedule a follow-up call within 2 weeks of the service. Ongoing communication until the project is complete will be through your Financial Force Community project if the service is incorporated into a larger implementation project, or via email.

### **Client Assumptions**

- Data should be provided in an Excel or CSV format in one sheet or workbook with unique records in each row. Multi-tab spreadsheets or multiple rows of data per record will not import successfully and will require additional services. Company cannot access or extract data from other systems or locations.
- Not all data from a legacy system or database will have a one for one match in your Company solutions. We will work with the client to determine the best approach to capture and map this data.
- Client is responsible for providing login information ahead of time to users, as well as provide devices where the mobile app(if applicable) or web browser is downloaded and up to date.
- Client is responsible for troubleshooting any issues related to their IT infrastructure including network and device management.
- The client will schedule time for the appropriate resources to be available to the consultant for the duration of any confirmed virtual meeting(s). The success of this process is dependent on the attendance and responsiveness of the key stakeholders.
- Client will verify with their Company Project Coordinator that they have the correct versions of applications to allow for requested changes to their data or account configuration.
- The client will also provide a dedicated room or area with adequate technology for successful virtual training, including but not limited to monitor/projector, computers/tablets and wireless internet access.
- Client acknowledges rescheduling or cancelling services within 2 weeks of the confirmed date will require rescheduling based on current availability which may result in delays to the larger implementation project.
- Rescheduling or cancellation of the service within 2 weeks of the scheduled delivery date will result in a \$500 rescheduling fee.



### **Order Form terms**

- By accepting this Order Form, and notwithstanding anything to the contrary in any other purchasing agreement, Subscriber agrees to pay all relevant Fees for the full Services Term defined above.
- Payment terms: Net 30
- The "Effective Date" of the Agreement between Subscriber and Company is the date Subscriber accepts this Order Form.
- This Order Form and its Services are governed by the terms of the Brightly Software, Inc. Master Subscription Agreement found at <http://brightlysoftware.com/terms> (<http://brightlysoftware.com/terms>) ("Terms"), unless Subscriber has a separate written agreement executed by Brightly Software, Inc. ("Company") for the Services, in which case the separate written agreement will govern. Acceptance is expressly limited to these Terms. Any additional or different terms proposed by Subscriber (including, without limitation, any terms contained in any Subscriber purchase order) are objected to and rejected and will be deemed a material alteration hereof.
- To the extent professional services are included in the Professional Services section of this Order Form, the Professional Services Addendum found at <http://brightlysoftware.com/terms> (<http://brightlysoftware.com/terms>) is expressly incorporated into the Terms by reference.
- During the Term, Company shall, as part of Subscriber's Subscription Fees, provide telephone and email support ("Support Services") during the hours of 8:00 AM and 6:00 PM EST, (8:00 am – 8:00 pm EST for Community Development Services) Monday through Friday ("Business Hours"), excluding Company Holidays.
- Company maintains the right to increase Subscription Fees within the Services Term by an amount not to exceed the greater of prices shown in the investment table or the applicable CPI and other applicable fees and charges every 12 months. Any additional or renewal Service Terms will be charged at the then-current rate.
- Acceptance of this Order Form on behalf of a company or legal entity represents that you have authority to bind such entity and its affiliates to the order, terms and conditions herein. If you do not have such authority, or you do not agree with the Terms set forth herein, you must not accept this Order Form and may not use the Service.
- Proposal expires in sixty (60) days.
- Subscriber shall use reasonable efforts to obtain appropriation in the full amount required under this Order Form annually. If the Subscriber fails to appropriate funds sufficient to maintain the Service(s) described in this Order Form, then the Subscriber may terminate the Service(s) at no additional cost or penalty by giving prior written notice documenting such non-appropriation. Subscriber shall use reasonable efforts to provide at least thirty (30) days prior written notice of non-appropriation. Subscriber agrees non-appropriation is not a substitute for termination for convenience, and further agrees Service(s) terminated for non-appropriation may not be replaced with functionally similar products or services prior to the expiration of the Services Term set forth in this Order Form. Subscriber will not be entitled to a refund or offset of previously paid, but unused Fees.

### **Additional information**

- Prices shown above do not include any taxes that may apply. Any such taxes are the responsibility of



Subscriber. This is not an invoice. For customers based in the United States, any applicable taxes will be determined based on the laws and regulations of the taxing authority(ies) governing the "Ship To" location provided by Subscriber. Tax exemption certifications can be sent to [accountsreceivable@brightlysoftware.com \(mailto:accountsreceivable@brightlysoftware.com\)](mailto:accountsreceivable@brightlysoftware.com).

- Billing frequency other than annual is subject to additional processing fees.
- Please reference Q-335975 on any applicable purchase order and email to [accountsreceivable@brightlysoftware.com \(mailto:accountsreceivable@brightlysoftware.com\)](mailto:accountsreceivable@brightlysoftware.com)
- Brightly Software, Inc. maintains the necessary insurance coverage for its products and professional services, including but not limited to liability and errors & omissions coverage. Proof of insurance can be provided upon request.



## Signature

Presented to:

Q-335975

Accepted by:

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**Printed Name**

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**Signed Name**

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**Title**

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**Date**