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Statement of Work

Productivity Governance and Compliance

Prepared for

Prepared by

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This Statement of Work (SOW) and any exhibits, appendices, schedules, and attachments to it are made pursuant to Work Order **FY20-7-TRAUUNWCB** and describes the work to be performed (Services) by Microsoft (“us,” “we”) for (“Customer,” “you,” “your”) relating to Productivity Governance and Compliance (project).

This SOW and the associated Work Order expire 30 days after their publication date, unless signed by both parties or formally extended in writing by Microsoft.

# Project objectives and scope

## Objectives

The standard **Productivity Governance and Compliance Offer** is a eight engagement that is delivered on site with the Customer to develop specific, prescriptive governance guidance for the Customer’s intended use of Microsoft Office 365—with a particular focus on the collaborative capabilities available through Microsoft SharePoint Online and related Office 365 collaboration functionality. It is intended to:

* Cover traditional governance and identify directive (and configuration specifications, as appropriate) topics that are oriented to the current online version of SharePoint Online and related collaboration functionality, including Office 365 Groups and Microsoft Teams.
* Produce governance directives that the Customer can use to control, administer, and manage Office 365 collaboration capabilities according to its specifications.

The project will include the following components.

| ID | Component name |
| --- | --- |
| OIA-01 | Office 365 Information Architecture |
| SCG-01 | Office 365 Security and Compliance Governance |
| OAG-01 | Office 365 Applications Governance |
| OOG-01 | Office 365 Operations Governance |

## Areas in scope

### General project scope

The Productivity Governance and Compliance project components and scope are specified in the following table.

| Component (ID) | Description | Assumptions |
| --- | --- | --- |
| Office 365 Information Architecture (OIA-01) | * Delivery of up to 4 Office 365 information architecture assessment and planning workshops related to the development of information architecture directives that define how different service workloads will be used by the organization for various business and technical purposes. Timeboxed at 40 hours * Definition of the pre-requisites and support for Skype and Exchange Hybrid enablement; * Assistance with additional Office 365 information architecture-related planning beyond the scope of the baseline component (for example additional time needed, or additional topic coverage). Such assistance is limited to 40 hours over no longer than 1 weeks). | The organization plans to use Office 365 for at least 1 collaborative workload. |
| Office 365 Security and Compliance Governance (SCG-01) | * Delivery of up to 7 Office 365 security and compliance assessment and planning workshops related to the development of Office 365 security and compliance governance directives that define how different service workloads will be secured by the organization for various business and technical purposes. Timeboxed at 40 hours. * Assistance with additional Office 365 security and compliance–related planning beyond the scope of the baseline components (such as additional time needed or additional topic coverage). Such assistance is limited to up to 40 hours over a duration of no longer than 1 weeks). | The organization plans to use Office 365 security and compliance control capabilities (in addition to Exchange Online and OneDrive for Business, preferably SharePoint Online, Groups and Teams) for at least 1 collaborative workload. |
| Office 365 Applications Governance  (OAG-01) | Delivery of up to 6 Office 365 application governance assessment and planning workshops related to the development of Office 365 applications governance directives that define how core workloads (Groups, Exchange, SharePoint, OneDrive for Business, and Teams) will be controlled by the organization for various business and technical purposes. Timeboxed at 40 hours.   * Assistance with additional Office 365 applications planning beyond the scope of the baseline components (such as additional time needed or additional topic coverage). Such assistance is limited to 40 hours over no longer than 1 weeks). | The organization plans to use at least 3 of the following Office 365 workloads or applications:  Groups  Exchange  SharePoint  OneDrive for Business  Teams |
| Office 365 Operations Governance  (OOG-01) | * Delivery of up to 5 Office 365 operations–related assessment and planning workshops and the development of Office 365 operational governance directives that define how different service workloads will be managed by the organization for various business and technical purposes. Timeboxed at 24 hours. * Assistance with additional Office 365 operations governance-related planning beyond the scope of the baseline component (such as additional time needed or additional topic coverage). Such assistance is limited to 40 hours over no longer than 1 weeks. | The organization plans to manage its Office 365 operations as part of an overarching governance program. |

### Software products and technologies

The products and technology that are listed in the following table are required for project delivery. The Customer is responsible for obtaining all identified licenses and products. Microsoft assumes that any product version used during the project is either in mainstream support or is covered by an extended support agreement procured by the Customer.

| Component ID | Product and technology item | Version | Ready by |
| --- | --- | --- | --- |
| All | Office 365 | Current release | Workshop activities can be completed prior to tenant availability, but having one available—even if a test tenant—will be helpful during workshops. |

## Areas out of scope

Any area not explicitly included in the Areas in scope section is out of scope for Microsoft during this project. Areas out of scope for this project are listed in the following table.

| Component ID | Area | Description |
| --- | --- | --- |
| All components | Product licenses and subscriptions | Product licenses (Microsoft or non-Microsoft) and cloud service subscriptions are not included. |
| Hardware | Microsoft will not provide hardware for this project. |
| Product bugs  and upgrades | Product upgrades, bugs, and design change requests for Microsoft products are out of scope. |
| Source code review | The Customer will not provide Microsoft with access to non-Microsoft source code or source code information. For any non-Microsoft code, Microsoft Services will be limited to the analysis of binary data, such as a process dump or a network monitor trace. |
| Detailed site and solution design | Creating detailed designs for the configuration and setup of the Office 365 environment is out of scope. |
| Process reengineering | Designing functional business components of the solution is not included. |
| Organizational change management | Designing—or redesigning—the Customer’s functional organization is not included. |
| Cloud strategy | Developing the Customer’s cloud strategy and roadmap is out of scope. Review of existing cloud strategy during the Office 365 Information Architecture workshops is permissible. |
| Service management | Detailed service management and support program design is out of scope. |
| Training | Formal user training related to products or technology that includes workshops, classrooms, and books is not in scope. |
| Detailed product overviews | Product overviews beyond what is provided in the first workshops are out of scope, because this sort of education material is available from other Microsoft sales and Premier resources. |
| Office 365 Information Architecture  (OIA-01) | Non-Office 365-related information architecture (IA) planning | IA planning for non-Office 365 entities is out of scope. |
| Detailed information classification, taxonomy, and advanced content management planning | Advanced planning of IA elements, such as planning related to the following: content type, managed metadata, and Office 365 labels. |
| Classic site IA planning | This component focuses only on "Modern site" IA given that these are the direction forward and they underpin other workload types (e.g. Teams and Groups). |
| Office 365 Security and Compliance Governance  (SCG-01) | Non-Office 365-related security and compliance planning | Security and compliance planning for non-Office 365 entities is out of scope. |
| Detailed Office 365 security and compliance implementation planning | Development of detailed specifications related to Office 365 security and compliance controls, such as detailed policy specifications, is out of scope. |
| Classic controls | This component focuses on modern forms of security and compliance controls; for example, those that focus on the Microsoft 365 Security and Compliance Center admin console. Classic forms of records management, for example, are out of scope, because Microsoft uses the retention label capability available from the Microsoft 365 Security and Compliance Center. |
| Office 365 Applications Governance (OAG-01) | Non-Office 365-related applications governance planning | Application governance planning for non-Office 365 entities is out of scope. |
| Detailed Office 365 applications implementation planning | Development of detailed specifications related to Office 365 applications controls, such as detailed configuration settings, is out of scope. |
| Classic controls | This component focuses only on "Modern" forms of applications governance controls, e.g. those focusing on "modern" sites in SharePoint Online. |
| Office 365 Operations Governance (OOG-01) | Non-Office 365-related operational capability planning | Operational governance planning for non-Office 365 entities is out of scope. |
| Detailed Office 365 operations planning | Development of detailed specifications related to Office 365 operations planning is out of scope. This includes detailed support capability planning, change management planning, etc. |

# Project approach, timeline, and deliverable acceptance

## Approach

Microsoft Services uses the Online Solution Lifecyle delivery methodology, which consists of four distinct phases: Assess, Remediate, Enable, and Migrate. This particular engagement includes the Assess phase only; distinct activities and deliverables are described in the following sections. During the Assess phase, a project plan will be produced that documents the project schedule.



Microsoft reserves the right to delay the start of individual project components, when necessary, for the purposes of work prioritization or staffing optimization.

As part of this project, various deliverables will be created. If a deliverable requires formal review and acceptance (a process described in the Deliverable acceptance process section), this is indicated in the following sections.

### Engagement initiation

Before beginning the project, the following prerequisites must be completed.

| Category | Description |
| --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | Conduct a preinitiation call to initiate team formation and communicate expectations.  Conduct a detailed SOW walk-through with the Customer to agree on an initial project schedule and approach. |
| **Customer activities** The activities to be performed by the Customer | Attend and participate in the preinitiation call.  Staff the project with the required Customer resources, based on the time frames agreed upon in the preinitiation call. |

### General project activities

The following table describes the general activities for the project, organized by phase. These activities will be combined with the activities defined for in-scope [project components](#_Project_components_and) to establish the overall project approach.

| Category | Description |
| --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | **Assess phase**   * Prepare for, and conduct, the project kickoff meeting. * Document, discuss, and review conditions of satisfaction and define critical success factors of the project. * Create a preliminary project status report to be reviewed with the Customer project manager and refine it as necessary based on that person’s input. |
| **Customer activities** The activities to be performed by the Customer | **Assess phase**   * Provide project manager resources to work with the Microsoft project manager and manage Customer resources and assigned project activities. * Manage scheduling and logistics. * Provide project resources and subject matter experts to participate in workshops. * Make necessary design and planning decisions in a timely fashion to facilitate completion of the Assess phase within the timelines documented in the [Timeline](#_Timeline_1) section. * Review the Assess phase deliverables. * Produce and manage the project plan for the Customer project activities. * Participate in the introduction meeting; answer questions from Microsoft related to business objectives, requirements, and important dates; and provide high-level environmental information. |

#### General project component deliverables:

Microsoft will produce the following project deliverables; they include content from in-scope project components with the Assess phase. Not all components will be covered in all deliverables, and the [Project components](#_Project_components_and) section documents how each component will be covered in these project deliverables. Deliverables will either be prepared as combined documents with content for all in-scope components, or multiple component-specific instances of these deliverables will be produced. During the Assess phase of the project, Microsoft and the Customer will mutually agree on a consolidated or per-component deliverable structure and use that structure for deliverable acceptance.

Additional component-specific deliverables might be produced for the project and any such deliverables are described in the Project components and deliverables section.

| Name | Description | Phase | Acceptance required? | Responsibility |
| --- | --- | --- | --- | --- |
| Project plan | A list of key Microsoft activities, milestones, dependencies, and durations for this engagement | Assess | Yes | Microsoft |
| Governance plan | A document that captures directives produced during the workshops | Assess | Yes | Microsoft |
| Delivery summary | A Microsoft Word document that summarizes the work completed, , and documents recommended next steps | Assess | No | Microsoft |

### Project components and deliverables

The following subsections describe the activities related to the in-scope project components, organized by overall project phase. These activities will be combined with the [general project activities](#_General_project_activities) to establish the overall project approach. The unique deliverables for each component, and the project deliverables to which each component contributes, are also described in the following table.

#### Office 365 Information Architecture (OIA-01)

| **Category** | **Description** |
| --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | **Assess phase**   * After a kickoff meeting, provide a series of assessment and planning workshops, focusing on the following:   + Discovery supporting Office 365 overview, current state assessment, and requirements   + Modern Office 365 communication and collaboration reference architecture and future state Information Architecture   + Modern site Information Architecture * Develop directives, documentation, and the report out. * Provide time-boxed assistance with additional Office 365 Information Architecture planning activities. |
| **Customer activities** The activities to be performed by the Customer | **Assess phase**   * Participate in the workshops. * Communicate business and technical requirements. * Participate in decision making related to the production of directives. * Codevelop directives * Participate in the report-out meeting. * Work with Microsoft resources providing additional assistance related to Office 365 Information Architecture planning. |
| **Key assumptions** | Customer stakeholders have working knowledge of Office 365 and are able to provide requirements and drive decisions related to the production of the directives and output. |
| **Project deliverables** Content for this project component will be included in these project deliverables | Project plan  Governance plan  Delivery summary |

#### Office 365 Security and Compliance Governance (SCG-01)

| **Category** | **Description** |
| --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | **Assess phase**   * After a kickoff meeting, provide a series of assessment and planning workshops, focusing on the following:   + Microsoft 365 Security and Compliance Center overview, current state assessment, and requirements   + Office 365 labels and retention policies   + Office 365 message and file encryption   + Office 365 conditional access   + Office 365 data loss prevention   + Office 365 external sharing   + Office 365 investigations, including eDiscovery, auditing, and supervision policies * Develop directives, documentation, and the report out. * Provide time-boxed assistance with additional Office 365 security and compliance governance planning activities. |
| **Customer activities** The activities to be performed by the Customer | **Assess phase**  Participate in logistics planning.  Participate in workshops.  Communicate business and technical requirements.  Participate in decision making, related to the production of directives.  Codevelop directives.  Participate in the report-out meeting.   * Work with Microsoft resources who are providing additional assistance related to Office 365 security and compliance governance planning. |
| **Key assumptions** | Customer stakeholders have working knowledge of Office 365 security and compliance capabilities and are able to provide requirements and make decisions related to the production of the directives and output. |
| **Project deliverables** Content for this project component will be included in these project deliverables | Project plan  Governance plan  Delivery summary |

#### Office 365 Applications Governance (OAG-01)

| **Category** | **Description** |
| --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | **Assess phase**  After a kickoff meeting, provide a series of assessment and planning workshops, focusing on the following:   * + Office 365 (core) applications overviews, current state assessment, and requirements   + Office 365 Groups   + Exchange Online   + SharePoint Online   + OneDrive for Business   + Microsoft Teams   Develop directives, documentation, and the report out.   * Provide time-boxed assistance with additional Office 365 applications governance planning activities. |
| **Customer activities** The activities to be performed by the Customer | **Assess phase**  Participate in logistics planning.  Participate in the workshops.  Communicate business and technical requirements.  Participate in decision making related to the production of directives.  Codevelop directives.  Participate in the report-out meeting.   * Work with Microsoft resources providing additional assistance related to Office 365 applications governance planning. |
| **Key assumptions** | Customer stakeholders have working knowledge of Office 365 application governance capabilities and are able to provide requirements and make decisions related to the production of the directives and output. |
| **Project deliverables** Content for this project component will be included in these project deliverables | Project plan  Governance plan  Delivery summary |

#### Office 365 Operations Governance (OOG-01)

| **Category** | **Description** |
| --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | **Assess phase**   * After a kickoff meeting, provide a series of assessment and planning workshops, focusing on the following:   + Office 365 operations governance overview, current state assessment, and requirements   + Office 365 service management and support   + Office 365 training and adoption   + Office 365 monitoring and reporting   + Office 365 roles and responsibilities * Develop directives, documentation, and the report out. * Provide time-boxed assistance with additional Office 365 operations governance planning activities. |
| **Customer activities** The activities to be performed by the Customer | **Assess phase**  Participate in logistics planning.  Participate in the workshops.  Communicate business and technical requirements.  Participate in decision making that is related to the production of directives.  Codevelop directives.  Participate in the report-out meeting.   * Work with Microsoft resources that are providing additional assistance related to Office 365 operations governance planning. |
| **Key assumptions** | Customer stakeholders have working knowledge of Office 365 security and compliance capabilities and are able to provide requirements and make decisions related to the production of the directives and output. |
| **Project deliverables** Content for this project component will be included in these project deliverables | Project plan  Governance plan  Delivery summary |

## Timeline

During project planning, a detailed timeline will be developed. All dates and durations are relative to the project start date and are estimates only.

**Important:** these timelines assume continuous full-time delivery and should thus be interpreted as the minimum number of days required for delivery. The timeline might be extended at Microsoft discretion to accommodate part-time resource availability or scheduling conflicts for important meetings and workshops.

## Deliverable acceptance process

During the project, Microsoft will submit certain deliverables (listed in the Approach section as deliverables with “Acceptance required?” equal to “Yes”) for the Customer’s review and approval.

Within three business days of the date of submittal, the Customer is required to:

* **Accept the deliverable** by signing, dating, and returning a service deliverable acceptance form, which can be sent by email, or by using (or partially using) the deliverable.

Or

* **Reject the deliverable** by notifying Microsoft in writing; the Customer must include a complete list of reasons for rejection.

Deliverables shall be deemed accepted unless the written rejection notification is received by Microsoft in the time frame specified.

If a rejection notification is received, Microsoft will correct problems with a deliverable that are in scope for the project (and documented in this SOW), after which the deliverable is deemed accepted.

Problems that are outside the scope of this SOW, and feedback provided after a deliverable has been accepted will be addressed as a change request, managed as described in the Change management process section.

## Project governance

The governance structure and processes the team will adhere to for the project are described in the following sections.

### Project communication

The following will be used to communicate during the project:

* **Communication plan**: this document will describe the frequency, audience, and content of communication with the team and stakeholders. It will be developed by Microsoft and the Customer as part of project planning.
* **Status reports**: the Microsoft team will prepare and issue regular status reports to project stakeholders according to the frequency defined in the communication plan.

### Risk and issue management

The following general procedure will be used to manage active project issues and risks during the project:

* **Identify**: identify and document project issues (current problems) and risks (potential problems that could affect the project).
* **Analyze and prioritize**: assess the potential impact and determine the highest priority risks and problems that will be actively managed.
* **Plan and schedule**: determine the strategy for managing priority risks and issues and identify a resource who can take responsibility for mitigation and remediation.
* **Track and report**: monitor and report the status of risks and problems.
* **Escalate**: escalate to project sponsors the high impact problems and risks that the team is unable to resolve.
* **Control**: review the effectiveness of risk and issue management actions.

Active issues and risks will be regularly monitored during the project.

### Change management process

During the project, either party is able to request modifications to the Services described in this SOW. These changes only take effect when the proposed change is agreed upon by both parties. The change management process steps are:

* **The change is documented**: All change requests will be documented by Microsoft in a Microsoft change request form and submitted to the Customer. The change request form includes:
  + A description of the change.
  + The estimated effect of implementing the change.
* **The change is submitted**: the change request form will be provided to the Customer.
* **The change is accepted or rejected**: the Customer has three business days to confirm the following to Microsoft:
  + Acceptance—the Customer must sign and return change request form.
  + Rejection—if the Customer does not want to proceed with the change or does not provide an approval within three business days, no changes will be performed.

### Escalation path

The Microsoft project manager will work closely with the Customer project manager, sponsor, and other designees to manage project issues, risks, and change requests as described previously. The Customer will provide reasonable access to the sponsor or sponsors in order to expedite resolution. The standard escalation path for review, approval, or dispute resolution is as follows:

* Project team member (Microsoft or the Customer)
* Project manager (Microsoft and the Customer)
* Microsoft delivery manager
* Microsoft and the Customer project sponsor

## Project completion

Microsoft will provide Services defined in this SOW to the extent of the fees available and the term specified in the Work Order. If additional Services are required, the Change management process will be followed and the contract modified. The project will be considered complete when at least one of the following conditions has been met:

* All fees available have been utilized for Services delivered and expenses incurred.
* The term of the project has expired.
* All Microsoft activities and in-scope items have been completed.
* The Work Order has been terminated.

# Project organization

## Project roles and responsibilities

The key project roles and the responsibilities are as follows.

#### Customer

| Role | Component ID(s) | Responsibilities |
| --- | --- | --- |
| Project sponsor | All | Provide the estimated project commitment: 16h per week  Make key project decisions.  Serve as a point of escalation to support clearing project roadblocks. |
| Project manager | All | Provide the estimated project commitment: 8h per week  Serve as the primary point of contact for the Microsoft team.  Manage the overall project.  Deliver the project on schedule.  Take responsibility for Customer resource allocation, risk management, and project priorities.  Communicate with executive stakeholders. |
| Office 365 (or related communication or collaboration) product manager | OAI-01, SCG-01, OAG-01, OOG-01 | Participate in workshops and provide requirements related to the organization's existing and planned communication and collaboration service offerings.  Assist with decision making and directives development. |
| Office 365 (or related communication or collaboration) infrastructure lead | OAI-01, SCG-01, OAG-01, OOG-01 | Participate in workshops and provide requirements related to the organization's existing and planned communication and collaboration infrastructure, and operations.  Assist with decision making and directives development. |
| Office 365 (or related communication or collaboration) security (or compliance) lead | OAI-01, SCG-01, OAG-01, OOG-01 | Participate in workshops and provide requirements related to the organization's high-level security and compliance requirements.  Assist with decision making and directives development. |
| Office 365 (or related communication or collaboration) IA lead | OAI-01, SCG-01, OAG-01, OOG-01 | Participate in workshops and provide IA-specific requirements.  Assist with decision making and directives development. |
| Business representative or liaison | OAI-01, SCG-01, OAG-01, OOG-01 | Participate in workshops and provide business requirements.  Optionally, assist with decision making and directives development. |

#### Microsoft

| Role | Component IDs | Responsibilities |
| --- | --- | --- |
| Microsoft delivery manager | All | Manage and coordinate the overall Microsoft project.  Serve as a single point of contact for escalations, billing issues, personnel matters, and contract extensions. |
| Microsoft project manager | All | Manage and coordinate Microsoft project delivery.  Take responsibility for issue and risk management, change management, project priorities, status communications, and status meetings.  Coordinate Microsoft and Microsoft subcontractor resources but not Customer resources. |
| Microsoft architect | All | Provide guidance based on Microsoft-recommended practices. |
| Microsoft senior. consultant | All | Lead workshops, provide technical expertise, drive decision making and directives development, and provide or deliver documentation and report out. |
| Microsoft consultant | All | Assist the lead consultant with coordination or logistics, product overviews (as required), requirements documentation, workshop output (directives) documentation, and report-out production. |

# Customer responsibilities and project assumptions

## Customer responsibilities

In addition to the Customer activities defined in the Approach section, the Customer is also required to:

* Provide information.
  + This includes accurate, timely (within three business days or as mutually agreed upon), and complete information.
* Provide access to people and resources.
  + This includes access to knowledgeable Customer personnel, including business user representatives, and access to funding if additional budget is needed to deliver project scope.
* Provide access to systems.
  + This includes access to all necessary Customer work locations, networks, systems, and applications (remote and onsite).
* Provide a work environment.
  + This consists of suitable work spaces, including desks, chairs, and Internet access.
* Manage non-Microsoft resources.
  + The Customer will assume responsibility for the management of all Customer personnel and vendors who are not managed by Microsoft.
* Manage external dependencies.
  + The Customer will facilitate any interactions with related projects or programs in order to manage external project dependencies.

## Project assumptions

The project scope, Services, fees, timeline, and our detailed solution are based on the information provided by the Customer to date. During the project, the information and assumptions in this SOW will be validated, and if a material difference is present, this could result in Microsoft initiating a change request to cover additional work or extend the project duration. In addition, the following assumptions have been made:

* Work day:
  + The standard work day for the Microsoft project team is between 9 AM and 6 PM, Monday through Friday.
* Standard holidays:
  + Observance of consultants’ country-of-residence holidays is assumed and has been factored into the project timeline.
* Remote working:
  + The Microsoft project team may perform Services remotely.
  + If the Microsoft project team is required to be present at the Customer location on a weekly basis, resources will typically be on site for three nights and four days, arriving on a Monday and leaving on a Thursday.
* Language:
  + All project communications and documentation will be in English. Local language support and translations will be provided by the Customer.
* Staffing:
  + If necessary, Microsoft will make staffing changes. These can include, but are not limited to, the number of resources, individuals, and project roles.
* Informal knowledge transfer:
  + Customer staff members who work alongside Microsoft staff will be provided with information knowledge transfer throughout the project. No formal training materials will be developed or delivered as part of this informal knowledge transfer.